

Lawson Business Intelligence (LBI) Reporting

Reports in LBI run off of the Reporting Services platform. For those who are new to this reporting tool, it is straight-forward. Pulling a report is as easy as selecting the parameters and running the report to pull the data.

Important: when logging into Lawson, not all users see the same dashboard report listings. Employees have different roles, so access to different sections is given to different employees. Most employees will have access to the “Daily Admin” tab. Contact your manager for further information.

CURRENT DASHBOARD LAYOUT (02/01/2016)

Lawson Dashboards								
Tools	Financial Services	FSIS	Enterprise Management	Executive	Payroll	Facilities Reporting	Daily Admin	Strategic Sourcing

LBI - Daily Admin Reports

SELECTING PARAMETERS ON A REPORT

Lawson Dashboards					
Tools	Financial Services	FSIS	Enterprise Management	Executive	Payroll
Daily Admin					
Daily Admin					
FINANCIAL REPORTS					
↓ -----SUMMARY----- +					
↗ FR-BI01 - General Ledger Budget vs. Actual 🔍 +					
↗ FR-BI02 Activity Budget vs. Actual 🔍 +					
↗ FR-BI03 School Remaining Balance 🔍 +					
↗ FR-BI04 General Ledger Account Detail 🔍 +					
↗ FR-BI05 Company 13 Carryover Balances 🔍 +					

Daily Admin

Daily Admin

FINANCIAL REPORTS

- ✦ -----SUMMARY----- ✦
- ✦ FR001 - General Ledger Budget vs. Actual 🔍 ✦
- ✦ FR002 - Activity Budget vs. Actual 🔍 ✦
- ✦ FR003 - School Remaining Balance 🔍 ✦
- ✦ FR004 - General Ledger Account Detail 🔍 ✦
- ✦ FR005 - Company 13 Carryover Balances 🔍 ✦

1. Select a report to run off of the dashboard.
2. We will run the “FR001 - General Ledger Budget vs Actual” report. Click the report link as shown above.
3. Sometimes reports will open up with defaults (such as Fiscal Year), but these can be changed when needed.
4. Report parameters should be selected left to right, top to bottom.
5. In this report, select the appropriate “Fiscal Year” first.
6. Use the “Select BR” drop down to select one or more BR’s.
7. Use the drop downs to select the “Starting Period” and “Ending Period”.
8. Select the appropriate “Company”.
9. “Location” will auto-fill based on the previous selections.
10. Click “View Report” when done to view results of the chosen parameters.

Daily Admin > FR001 - General Ledger Budget vs. Actual

Select Fiscal Year: 2015 Select BR(s): 0150

Select Starting Period: 5 - Nov Select Ending Period: 5 - Nov

Select Company: 10 Select Location(s): 0150

1 of 1 100% Find | Next [Print] [Export] [PDF]

 **GL - Budget to Actual** GL Transaction Summary
GL Transaction Detail

Updated: 12/3/2015 2:56:01 PM

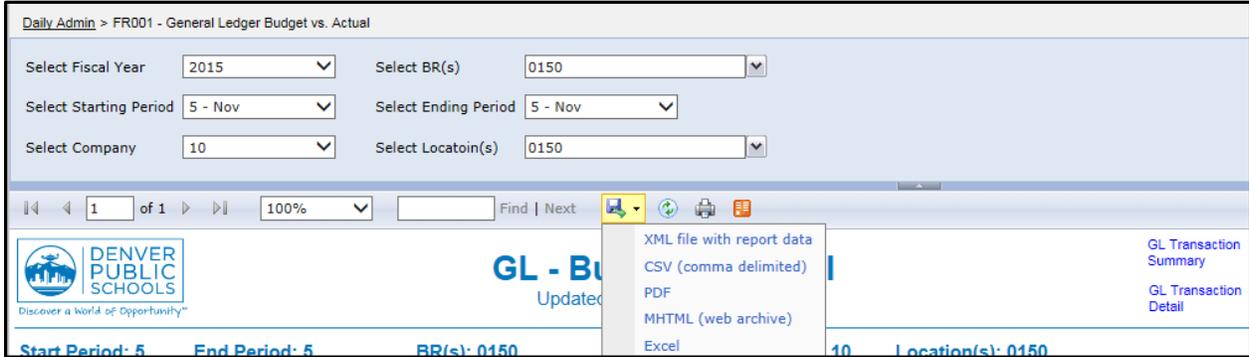
Start Period: 5 End Period: 5 BR(s): 0150 Company: 10 Location(s): 0150

	BUDGET	ACTUALS	ENCUMB	TOTAL EXPENSE	REMAINING	% REMAINING
TOTAL SALARY & BENEFITS	\$2,335,072	\$192,252	-	\$192,252	\$2,142,820	91.77%
TOTAL NON-SALARY	\$224,714	\$14,114	-	\$14,114	\$210,600	93.72%
TOTALS	\$2,559,786	\$206,366	-	\$206,366	\$2,353,420	91.94%

EXPORTING THE REPORT

1. After the report has been run, the data can easily be exported.
2. Click the File Save drop down and choose the format you wish exported.
Usually, files are exported to Excel but can also be exported to CSV or PDF.

- Once you select the export type, the report will automatically open in that program.
- From there you can save the file to the appropriate location.



REQUESTING NEW REPORTS OR REPORT CHANGES

If the Lawson system does not have an existing form or report available to our end users, FSIS will work with the end user to create a new dashboard report (or tweak existing reports if possible). FSIS Management will have to sign off on the report before it is deployed.

- Go to the Finance Reports Request page, located at: <https://departments.dpsk12.org/hr/sysproc/reports/Pages/default.aspx>
- Click on the “Finance Report Requests” link on the left side of the page.



3. Click on the “Add New Item” link.



4. Fill out all fields with an * in the “Financial Reports - New Item” pop up form. Please fill out the form to the best of your ability. This will be a first draft so that we can better understand your needs. Financial Services will review the form and contact you to discuss in further detail.

The screenshot shows a 'Financial Reports - New Item' form window. It has a menu bar with 'Edit' and a toolbar with icons for Save, Cancel, Paste, Copy, Attach File, and Spelling. The form contains four input fields, each with a red asterisk indicating it is required:

- Report Name ***: A single-line text input field.
- Requestor Name ***: A single-line text input field.
- Target Audience ***: A large multi-line text area. Below the field, there is a blue instruction: 'Which users need this info; who is the intended audience; make sure it's clear who has access and who doesn't'.
- Search Criteria ***: A large multi-line text area. Below the field, there is a blue instruction: 'What is required; what is optional for the users to enter'.

5. Additional Steps for report deployment:

Action Item	Action Responsibility	
	Requestor	FSIS
1. Submit Request at HR/Finance Share Point Site with report example: https://departments.dpsk12.org/hr/sysproc/reports/Pages/default.aspx	X	
2. Verify receipt of request with any questions and additional information on available reporting if pertinent and send Quick Reference Guide (QRG) template to requestor with instructions		X
3. Complete QRG and return to FSIS report developer	X	
4. Develop report and stage to testing area		X
5. Complete Report Testing and final sign-off	X	
6. Move report to production and attach final QRG		X