Web Report Library User Guide

Prepared for:

Finance & Administration Budget Administrators

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Request Access to the WRL

Before you can begin using the WRL, you need to request access to it.

Mac Users: The software used to process the access request form (OnBase) only functions properly when you use Firefox. InfoView, the program that runs the Web Report Library, can be used with any browser on the Mac.

PC Users: The software used to process the access request form (OnBase) only functions properly when you use Internet Explorer. InfoView, the program that runs the Web Report Library, can be used with any browser.

1. Login to MyBGSU and click on the Employees link in the top menu. For security purposes, you are only able to submit the request form on your own behalf.

2. In the bottom right hand corner, click on the FMS Web Report Library Access Form link.

3. Complete the access form and click Submit.

4. Your request will be reviewed by the associated Data Custodians and you will receive an email once the form has been processed. This process typically takes a day or two to complete.

5. If necessary, you will be asked to provide an email approval from your supervisor to the Data Custodian before final access can be granted. You will receive a notification if this is required.

Login to the WRL

1. After you have been granted access, login to InfoView at the following address:
   https://ods.bgsu.edu/
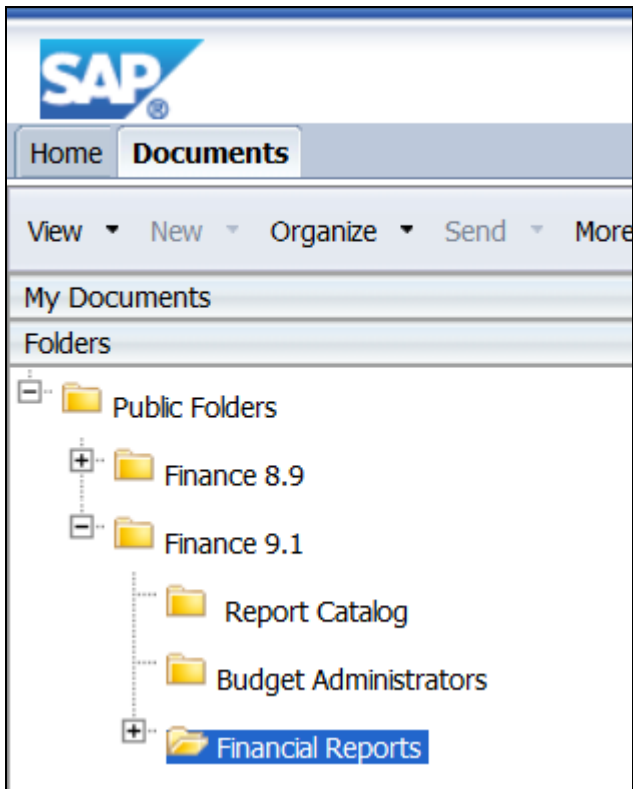2. Use your BGNet user name and password.
3. Select LDAP as the Authentication
4. Click Log On
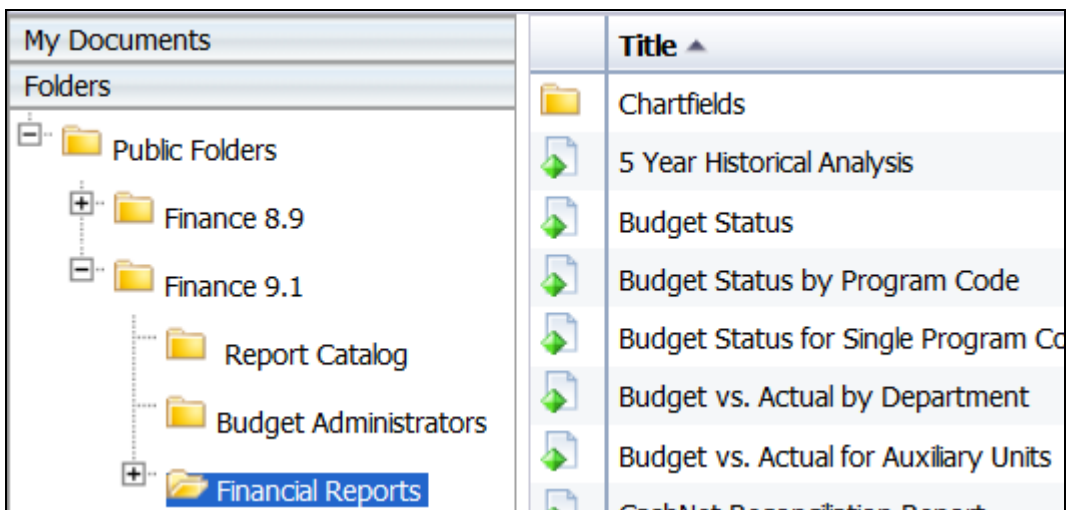
Find Your Reports

1. Expand Public Folders

2. Expand the Finance 9.1 folder

3. Select the Financial Reports folder to view the reports in that folder.

4. Hold your mouse over the title or the description in order to read the complete text.

5. Double click on the desired report to open it.

NOTE: Don't forget to check the navigation at the top right corner of the window to see if there are additional pages of reports available.
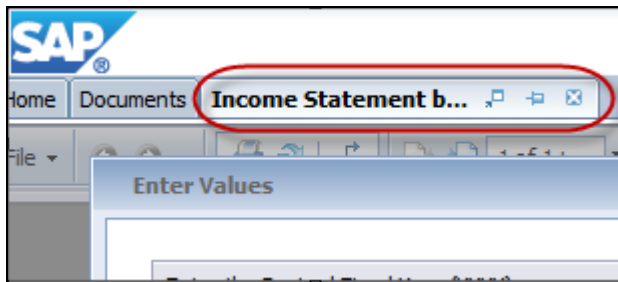
BGSU
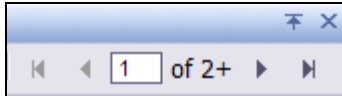
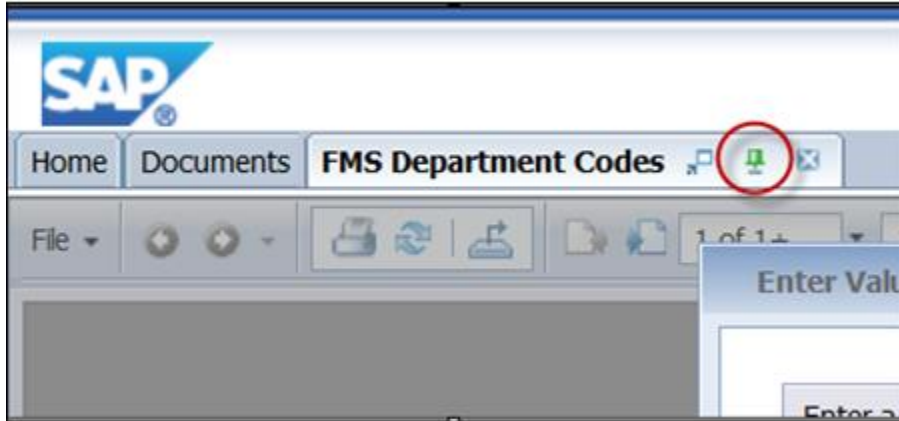## EXAMPLE 1: EXPORT A REPORT AS A PDF

Navigate to the Income Statement by Fund and Account report within the Finance 9.1/Financial Reports folder. Double click to open the report.
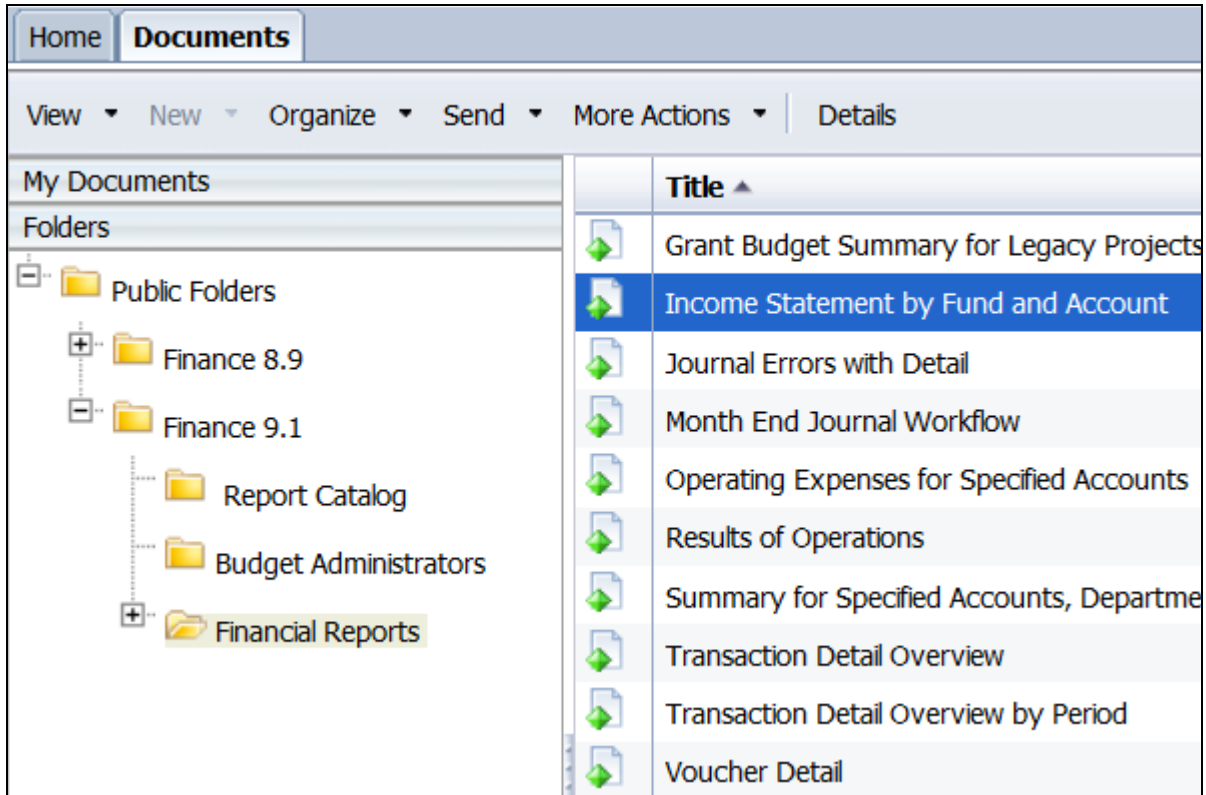
Notice that the report opened in a new tab at the top. You can switch between tabs and open several reports at once. Click on the Documents tab to return to the full list of reports.

Another option offered with the tab is the ability to "pin" a tab. When a tab is pinned, that report will be available on the menu bar whenever the user logs in to BI Launch Pad.

Enter the following parameters:

These next selections are known as dynamic parameters. Each selection that you make will populate the available selections in the following boxes. Make the first selection, wait for the next box to populate, and then make your next selection. For this type of parameter, you can select more than one value. Select the value on the left and then use the > or >> in the middle to move the value to the right.

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In this example, the report offers two different methods of display:


The Report Format display is the formal presentation version. Most often used when exporting the report as a PDF, this version is useful when you need a "pretty" view of the report. We will select Report Format for this example. The next example will explain the purpose of the Data Extract version.

Once you've filled in the parameters, click OK and the report will run.

Bowling Green State University
Income Statement by Fund and Account
7/1/2014 - 8/31/2014

	2015		2014	
	Budget	**Actual**	**Budget**	**Actual**
Education and General				
REVENUE				
State Appropriations	60,411,205	10,068,534	64,391,394	10,687,464
Student Fees	154,512,366	83,180,464	155,469,887	85,429,092
General Fees	26,333,098	13,944,117	26,023,198	14,209,055
Non Resident Fees	19,411,045	10,540,520	19,730,660	10,523,654
Other Income	10,571,487	1,988,872	11,881,019	3,506,410
Investment Income	3,025,000	5,781	3,025,000	5,284
TOTAL REVENUE	**274,264,201**	**119,728,289**	**280,521,158**	**124,360,959**
EXPENSE				
PERSONNEL				
Salaries	126,284,651	15,530,898	127,974,275	16,555,281
Fringes	36,280,345	5,009,598	36,216,533	5,293,450
Total PERSONNEL	162,564,996	20,540,497	164,190,808	21,848,730
OPERATING				
Supplies	5,255,173	2,069,606	4,980,317	977,626

To export the report, click the "Export this report" button in the upper left corner of the screen:
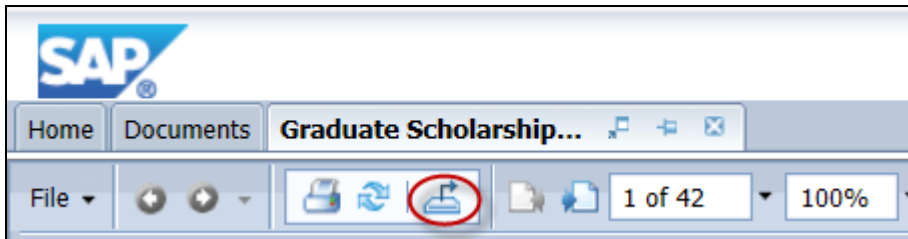
Because we selected the Report Format display option we're going to export the report as a PDF.
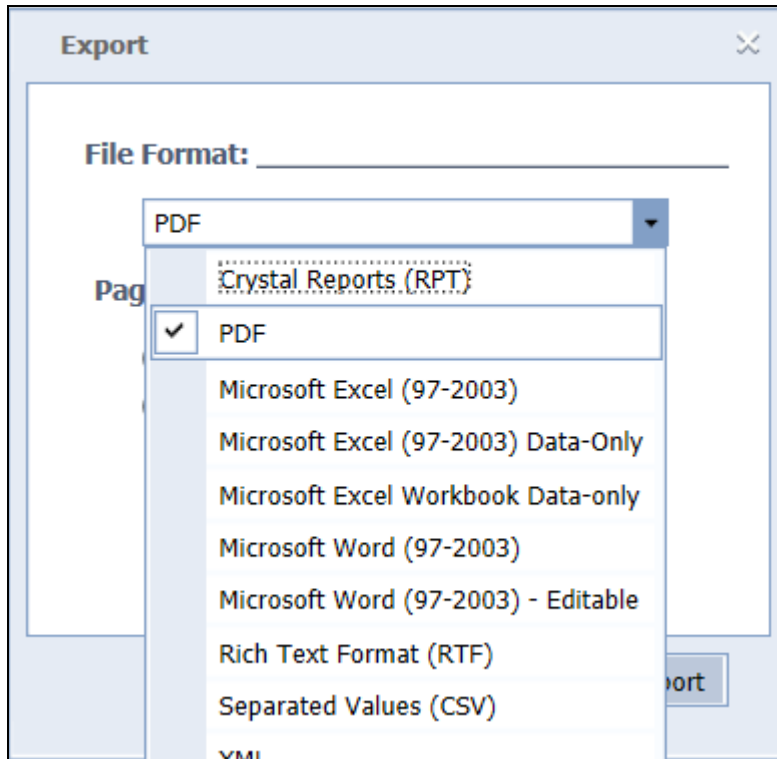
NOTE: If you try to export the file in the Crystal Reports (RPT) format you will receive an error.
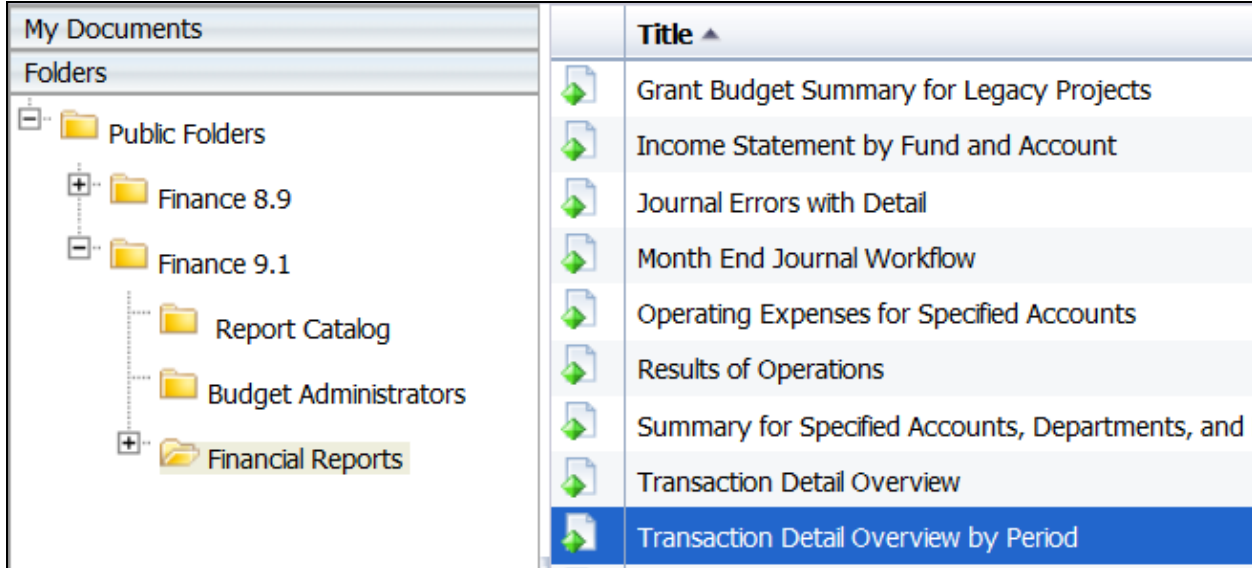
Upon opening the report in Acrobat, note that you can use the bookmarks in the left menu to quickly navigate to any area in the report.
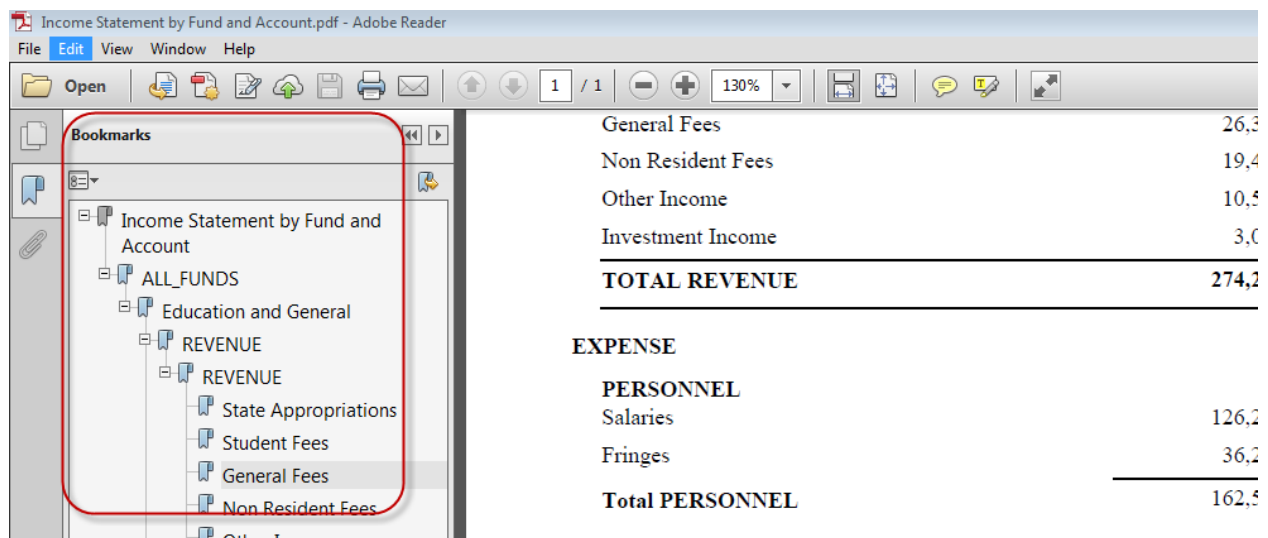
Example 2: Export a Report to Excel

Sometimes, you may want to be able to sort and manipulate the raw data. Most reports can accommodate this need.

Navigate to the Transaction Detail Overview by Period report within the Finance 9.1/Financial Reports folder. Double click to open the report.

Enter the following parameters:

In order to export the data in a format that works well in Excel, we'll select the Data Extract display option.

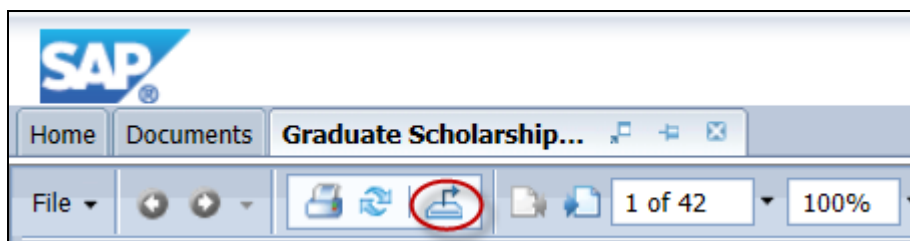This will strip out all of the "pretty" features of the report and just provide the raw data and simple column headings. The report is meant to be viewed from Excel.

To export the report, click the "Export this report" button in the upper left corner of the screen:

Because we selected the Data Extract display option we're going to export the report using the Data-Only version of Microsoft Excel.
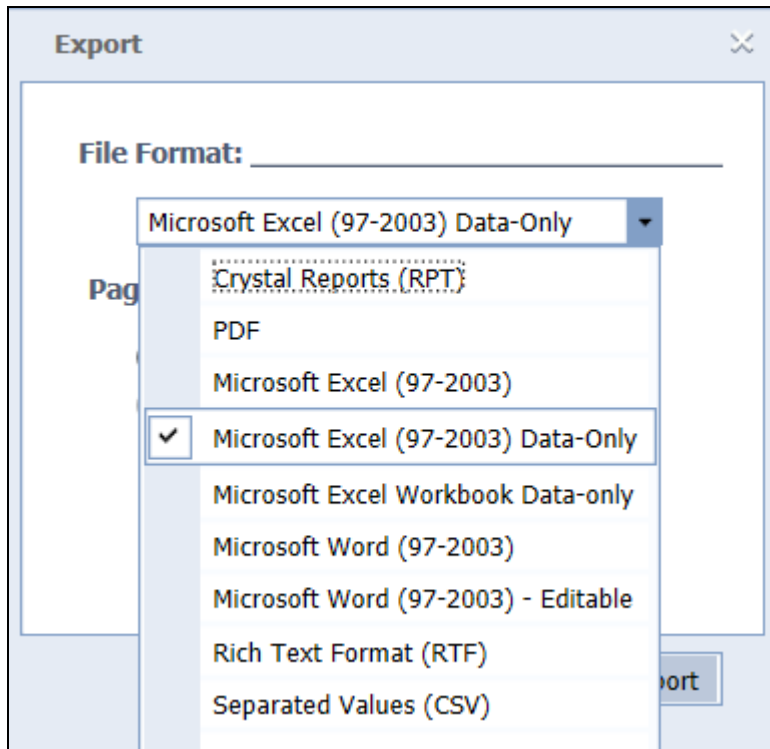
You'll be asked whether you'd like to save or open the spreadsheet. Please note that this information may appear at the top or the bottom of your screen depending on what browser you are using. Select open.

You'll see that the spreadsheet has no formatting except for the column titles. From here, the report can be expanded and sorted as desired.

	A	B	C	D	E	
1	Transaction Date	Journal ID	Description	Department	Account	Account De
2	1/7/2015	CNE0571750	CBA eMarket	114000	43410	Special Eve
3	1/8/2015	CNE0571809	CBA eMarket	114000	43410	Special Eve
4	1/9/2015	CND0571882	CashNet Deposit	114000	44440	Bgsu Foun

Example 3: Report Navigation and Searching

Navigate to the Budget Status report within the Finance 9.1/Financial Reports folder. Double click to open the report.

Enter the following parameters:

Search

To search for a specific word or phrase within a report, use the search box on the left side of the screen. Click the binoculars icon to open the search window. For this example, we'll search for the word "supplies."
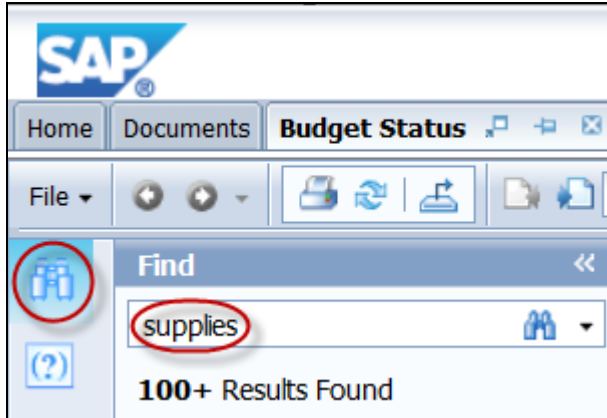
After typing the word or phrase into the search box, click the small binocular icon to the right of the phrase or press Enter.

Next, either select the top result in the list of results found to review the results individually or review the list of results for the specific result that you need.
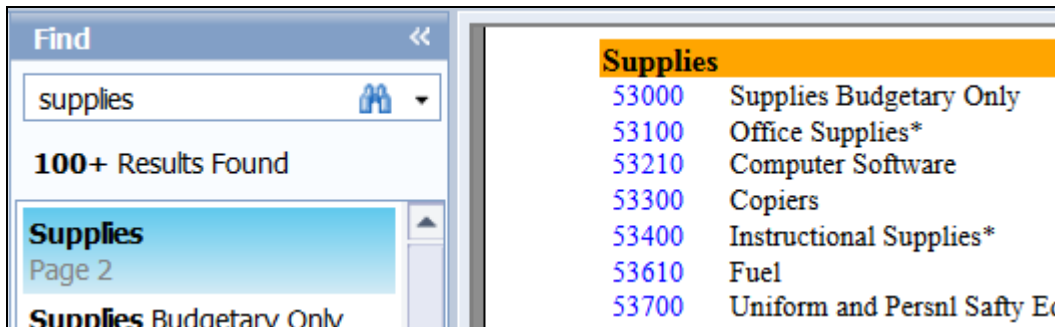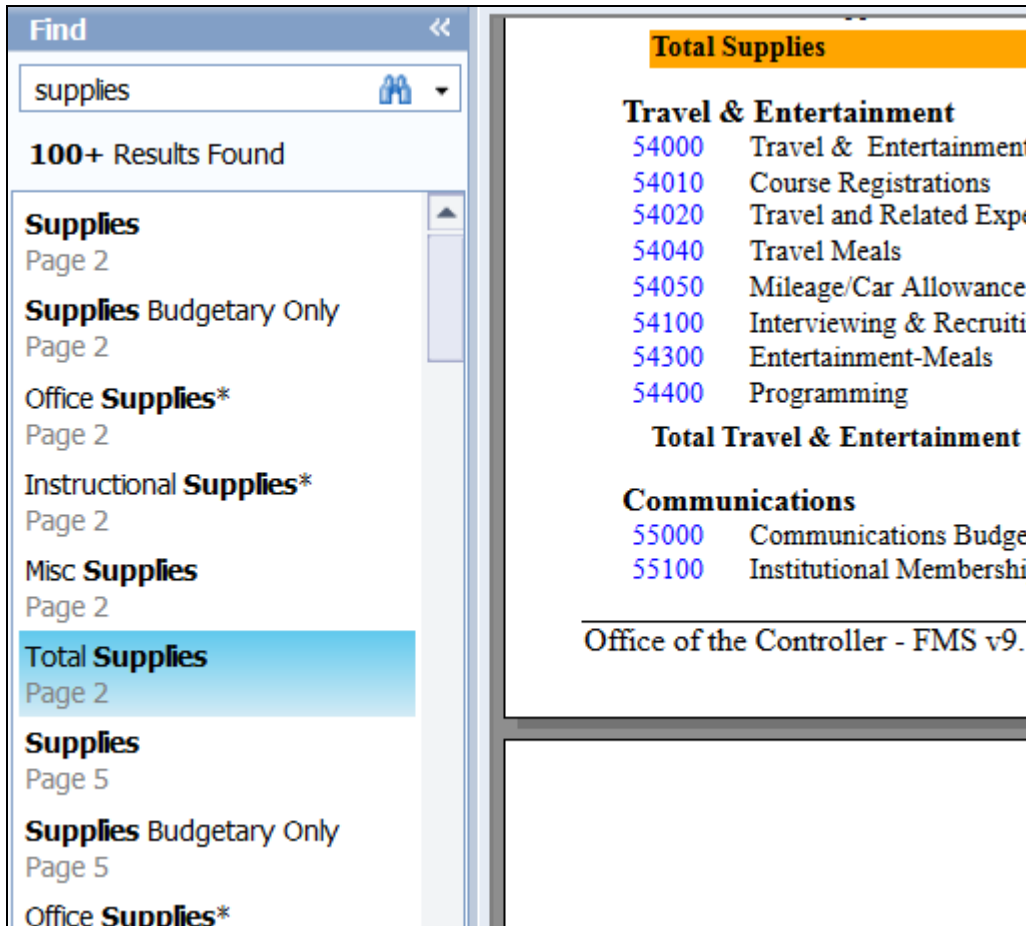
The system will highlight each instance of the word or phrase in question.

Report Navigation

To move from page to page within a report, use the page navigation.
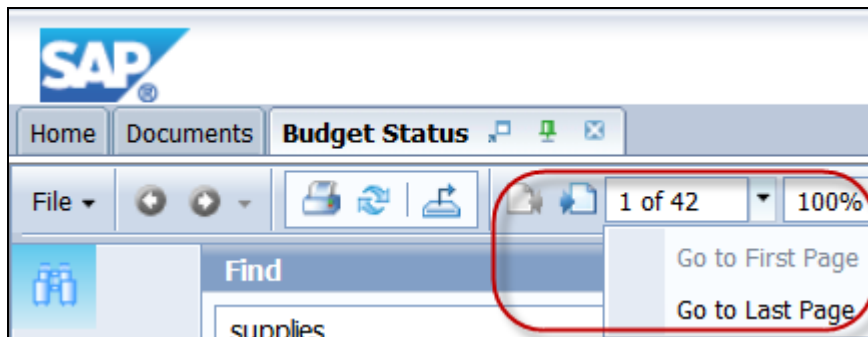
The arrows on the left will move you to the previous page and the arrows on the right move you to the next page. You can also type the number of a specific page into the box to move directly to that page. Or, you can use the drop down menu to select the first or last page.

Using the Group Tree

The Group Tree provides a hierarchical view of the main sections of the report.
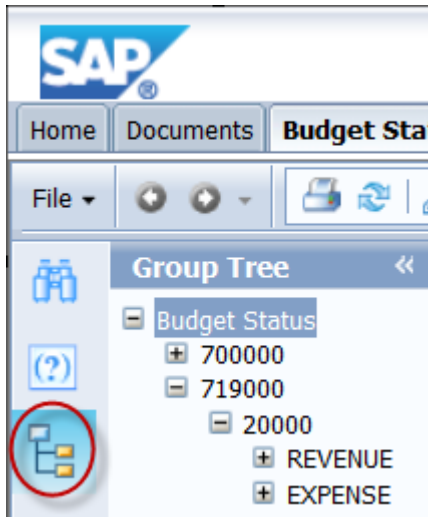
By highlighting any of the available categories, you can move directly to that section.
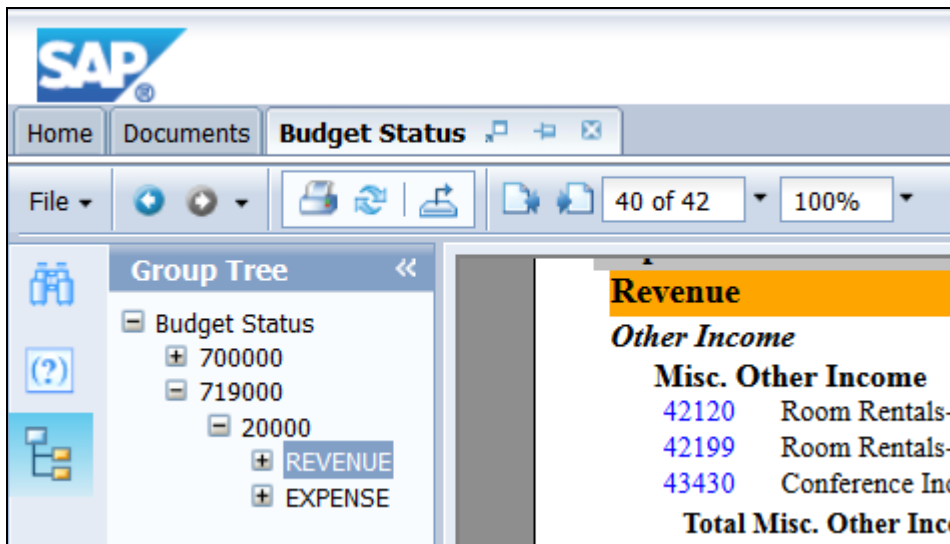
Changing Parameters

Sometimes, you'll need to change your selected parameters while viewing a report. The Web Report Library allows you to change parameters on the fly – without having to re-enter the entire report. Select the Parameters tab.
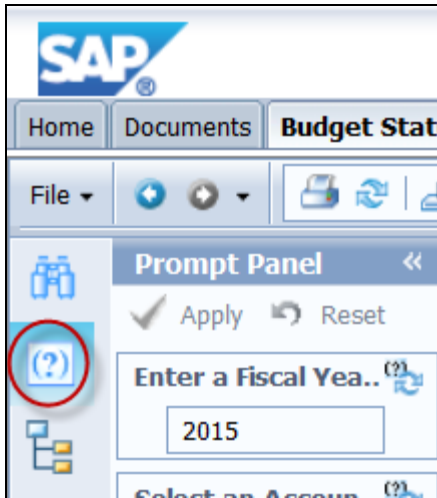
In this example, change the report to look at the prior month instead of the current month. Select the down arrow at the right side of the Parameters pane to access the drop down menu. You can change as many parameters as you wish. Click the green check marked Apply button to re-submit the report.
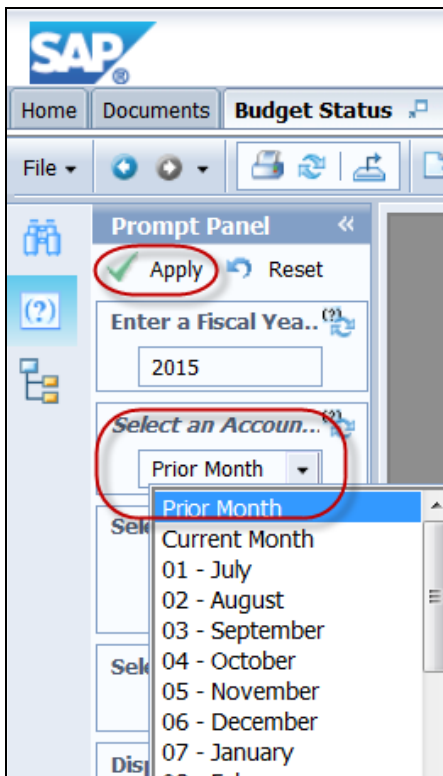
Drill Down to Detail

Some reports provide the opportunity to drill down to a finer detail. In this example, we're going to click on the Operating Fund Code 53000 - Supplies to view the sub-activity report. Click on the blue text next to the title "Supplies Budgetary Only" to open the sub-report.

The sub report displays its own Group Tree that is specific to the drill down level. Clicking on a category in the Group Tree moves you directly to that category within the report.

Example 4

Navigate to the Department Payroll Expense report within the Finance 9.1/Budget Administrators folder. Double click to open the report.

Select a College / Office:

Available Values:
- AVP Student Affairs
- Center for Health
- Dean of Students
- Recreation & Wellness
- Residence Life
- Student Media
- Student Organizations

Selected Values:
- AVP Student Affairs
- Dean of Students
- Residence Life

Remove   Remove All

Select One or More Departments:

Available Values:
- 200000 - VP Student Affairs
- 201000 - President's Leadership Academy
- 207000 - Office of Multicultural Affrs
- 207500 - TRIO Programs
- 208000 - Office of the Dean of Students
- 210000 - New Student Orientation
- 700000 - Office of Residence Life
- 708000 - Office of Campus Activities

Selected Values:
- 200000 - VP Student Affairs
- 201000 - President's Leadership Academy
- 207000 - Office of Multicultural Affrs
- 207500 - TRIO Programs
- 208000 - Office of the Dean of Students
- 210000 - New Student Orientation
- 700000 - Office of Residence Life
- 708000 - Office of Campus Activities

Remove   Remove All

Select One or More Funds: pFun

Available Values:
- ALL - All Departmental Funds
- 10000 - BGSU - BG Campus
- 11000 - BGSU - Firelands Campus
- 12000 - Public Service
- 13000 - Course Fees - BG Campus
- 14000 - Student Organization-BG Campus
- 14500 - Student Organization-Firelands
- 15000 - F&A Recovery

Selected Values:
- ALL - All Departmental Funds

Remove   Remove All

Group by: pGroup1

Department

then Group By   pGroup2

Account

Display results in the: pReportFormat

Report Format

WRL Advanced Training Class Contents

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5. My Preferences

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7. How to get answers to your questions

Find lots of helpful information here:

FMS 9.1 Reports – Web Report Library web page
http://www.bgsu.edu/content/bgsu/en/its/services/peoplesoft/fms/wrl.html

If you are encountering additional issues or your questions are not directly addressed in this material please contact the TSC either by email TSC@bgsu.edu or phone 2-0999.