LaGov Core Component ECC Navigating & Reporting

This course is intended to be a learning resource for employees who will use the modules that reside in the Core Component (ECC) of the LaGov ERP system.

Course Objectives

Upon completing this course, participants should be able to:

- Identify the modules included in the Core Component (ECC)
- Access LaGov ERP
- Log on and off the Core Component (ECC)
- Define the SAP Easy Access Menu key terms and concepts
- Navigate through the menus, toolbars and status bar
- Explain the difference between the SAP Menu and User Menu
- Customize the Core Component (ECC) with the User Options
- Identify the key elements of a transaction
- Successfully execute, search for, and end a transaction
- Identify system alert messages
- Navigate and execute reports in the Core Component (ECC)

Logging into LaGov

Before logging on, you must have a valid user ID and password.

LEO is actually a subsystem of LaGov, so you have only 1 user ID and password to remember. Use this same ID and password whether logging into the

- LaGov ERP portal
- LEO employee portal or
- When logging in using the LaGov ECC icon 

on your desktop

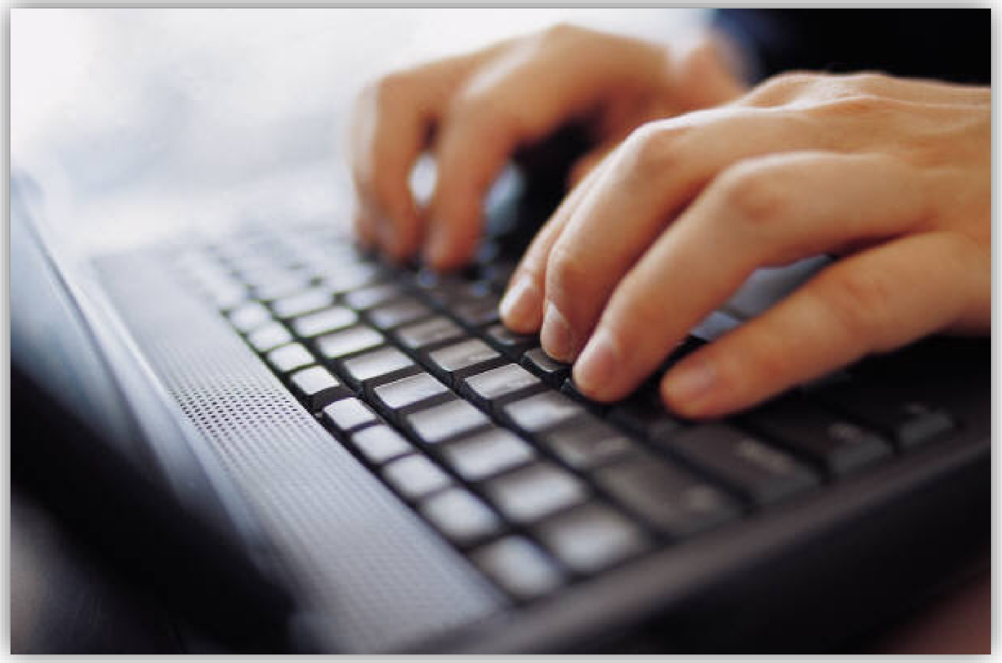
Need to change your password?

Locate the Forgot Password? Locked? link on either the LaGov ERP or LEO login page to change it OR click the New password button on the SAP GUI login screen (shown on Screen 6).

How to Access LaGov

There are multiple ways to access the LaGov system:

1. LaGov ECC shortcut.
2. LaGov ECC WebGUI link in LaGov ERP Single Sign-on Portal.
3. LaGov ECC WebGUI link in LEO.

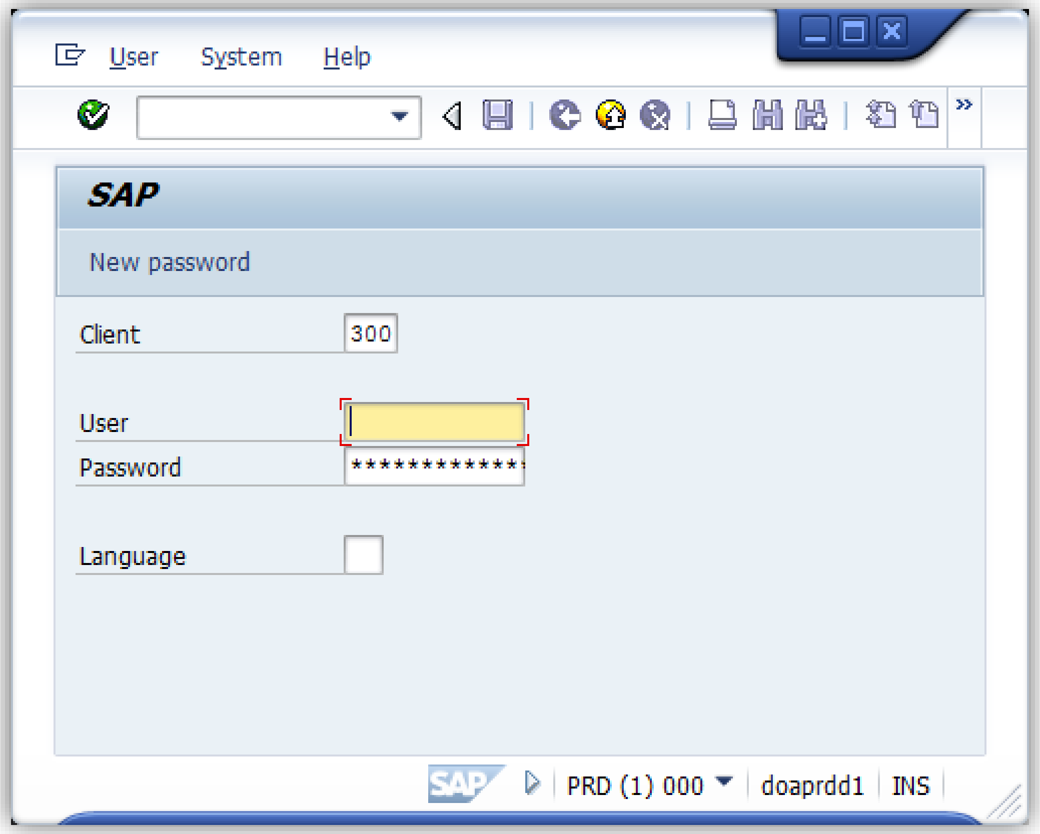


LaGov ECC Shortcut

- **Method #1** – LaGov ECC shortcut on your desktop.
  Please note that this requires the SAP GUI and Launch LaGov software to be installed on your PC.

1. Double click on the LaGov ECC icon on your desktop.

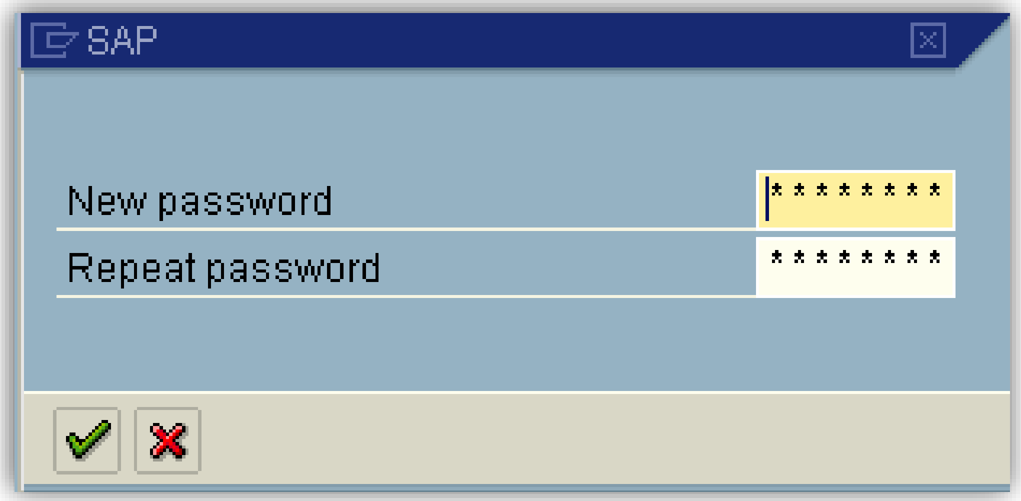
2. Type in your Personnel ID number in the *User* field and your password in the *Password* field and press the **Enter** key.



Changing Your Password

- If your password has expired, you will be prompted to change your password upon logon. Type a new 8 character password in both fields and click Enter.

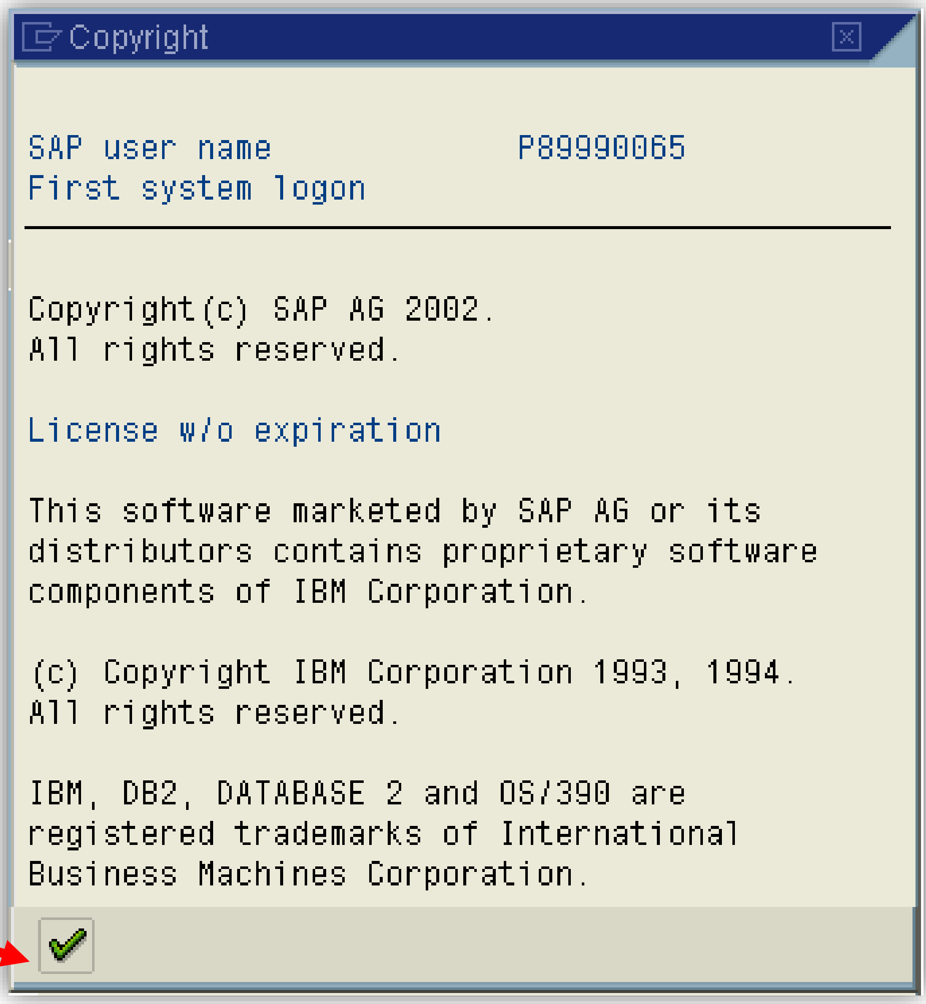
- The password selection rules and restrictions are detailed in LEO and available for your review.



First Time Logon

- The first time you logon, you will see the message on the right. This is a copyright message that will not be displayed on subsequent logons.

- To close the box, click Enter.



Course Objectives

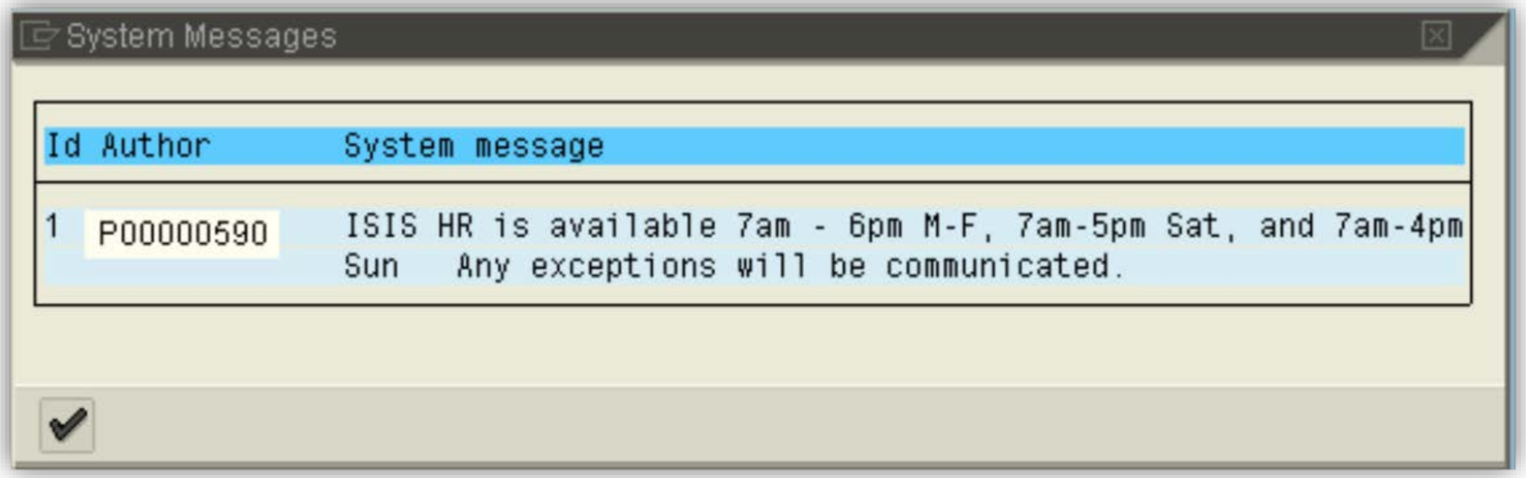
When **Broadcast Messages** exist, they will appear in a pop-up box after each logon. Broadcast messages contain important information and instructions.

Always read these messages carefully and follow the instructions.

Click Enter to close the message.

Caution!

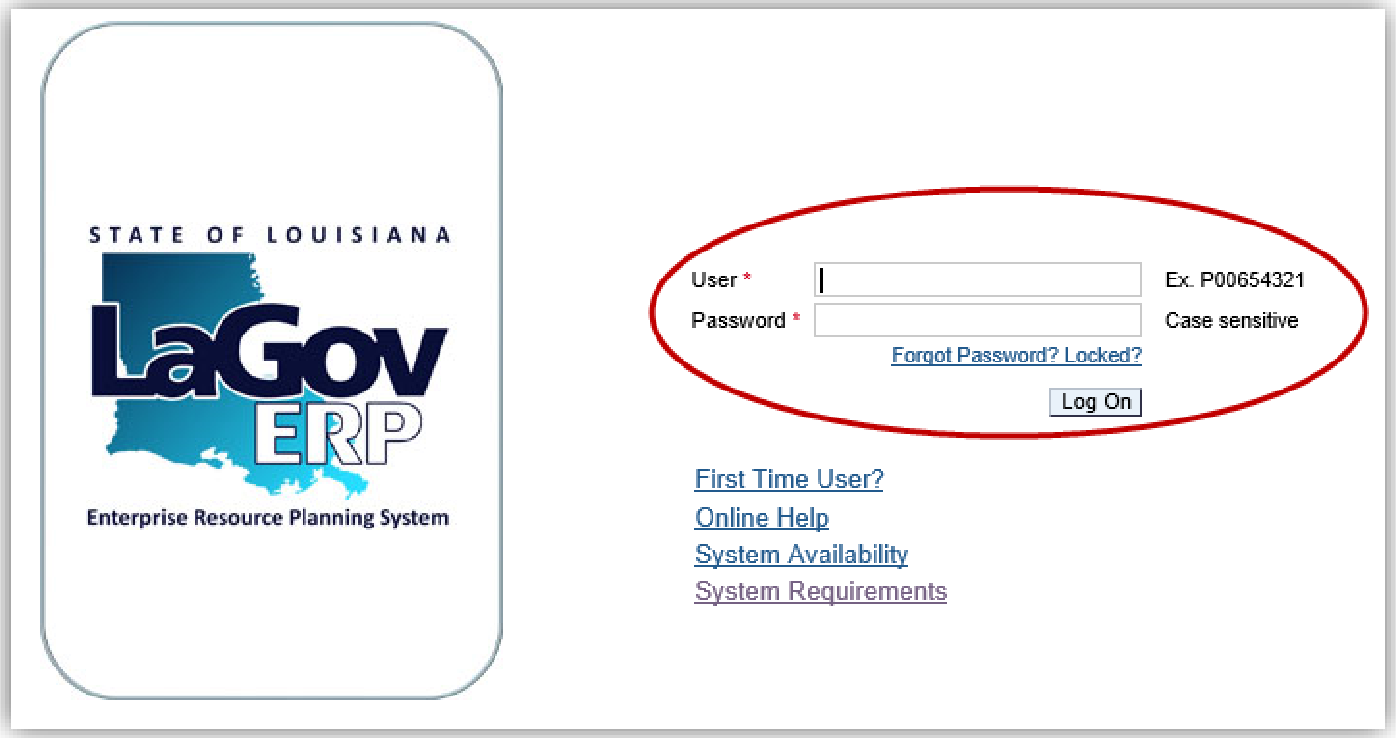
You will not have an opportunity to see the message again until the next time you logon.



LaGov ECC WebGUI link in LaGov ERP Portal

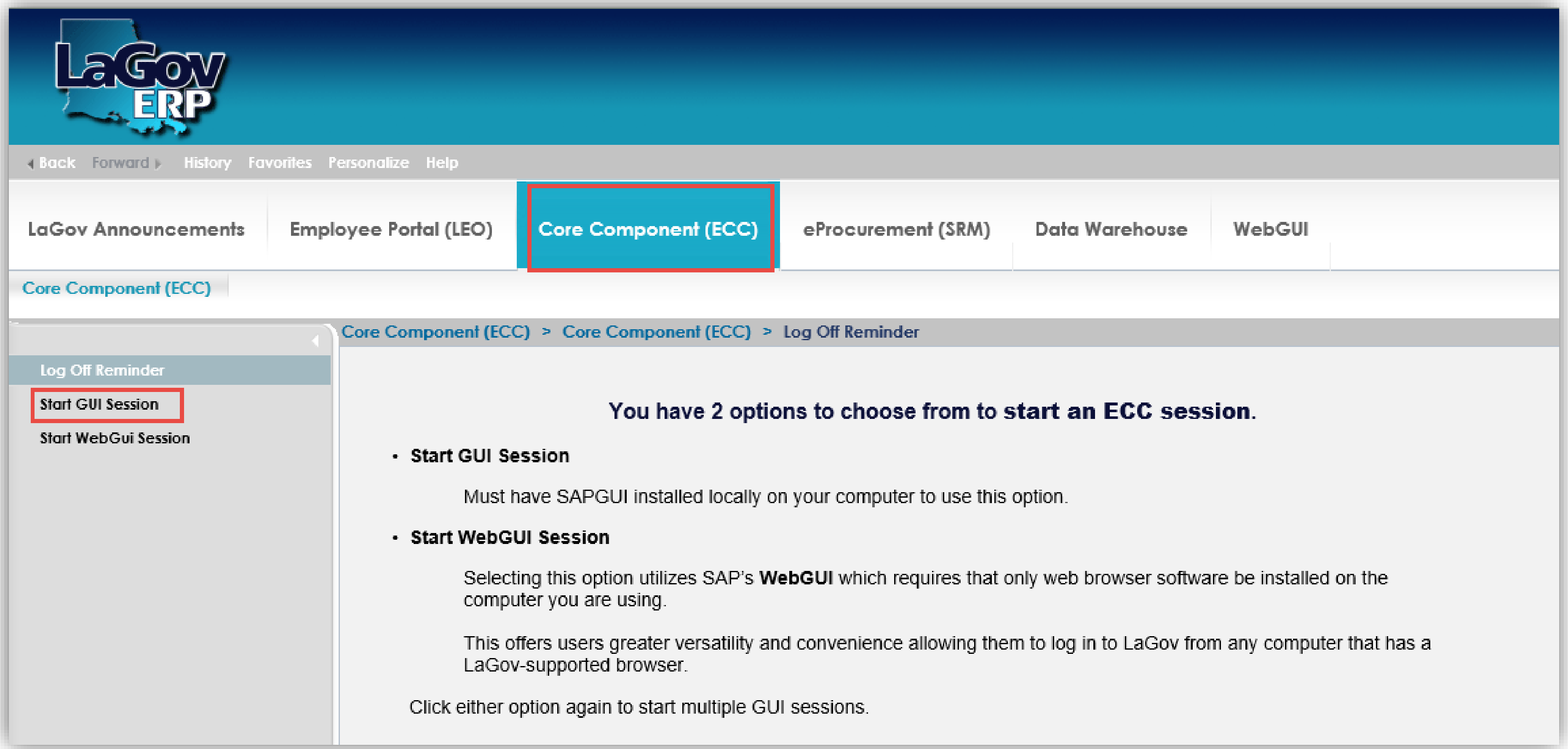
Method #2 – LaGov ECC WebGUI link in LaGov ERP Portal.
Please note that this requires the SAP GUI and Launch LaGov software to be installed on your PC. This may be the preferred method for some LaGov ERP agencies.

1. Click on the LaGov Portal icon on your desktop and login.



LaGov ECC WebGUI link in LaGov ERP Portal-cont'd

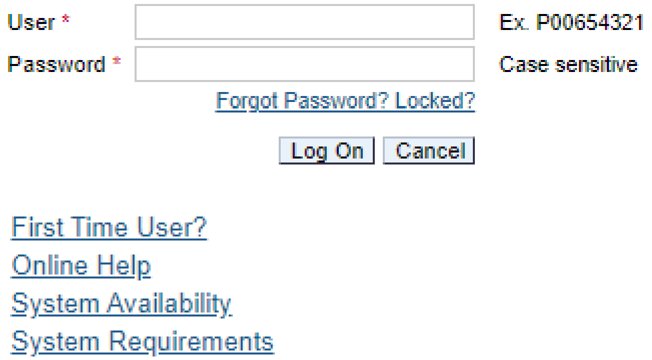
2. Navigate to the LaGov ECC WebGUI link via **Core Component (ECC)→Start GUI Session**



LaGov ECC WebGUI link in LEO

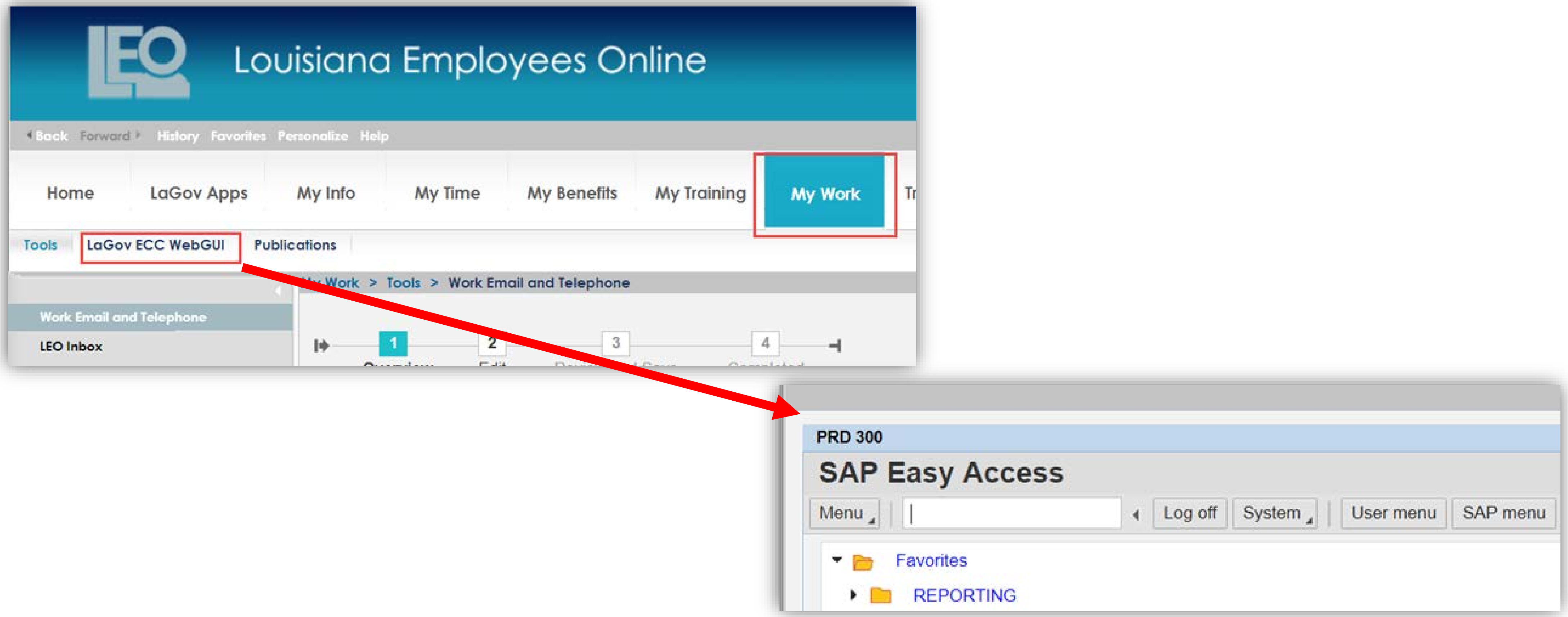
Method #3 – LaGov ECC WebGUI link in LEO.
This method does NOT require SAP software to be installed and provides an alternative method of accessing the system when away from your office PC (such as in an emergency office closure situation).

1. Login to Louisiana Employees Online (LEO)



LaGov ECC WebGUI link in LEO – cont'd

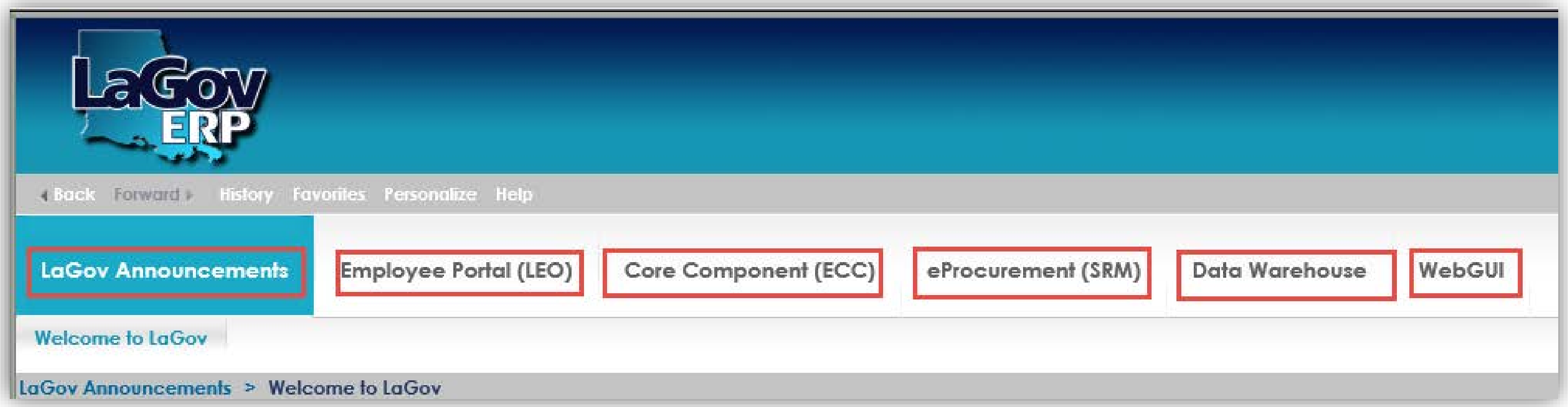
2. Navigate to the LaGov ECC WebGUI link via **My Work→LaGov ECC WebGUI**



Logging In

Once within the LaGov ERP portal, movement between major system components is accomplished by simply clicking on the appropriate tab.

(Note: If you do not see a tab displayed, your position does not have access to that particular functionality.)



First Level Navigation Tabs

Single Sign-on portal utilizes the following 1st level navigation tabs:

- LaGov ERP Announcements
- Employee Portal (LEO)
- Core Component (ECC)
- eProcurement (portal)
- Linear Assets
- Data Warehouse (portal)

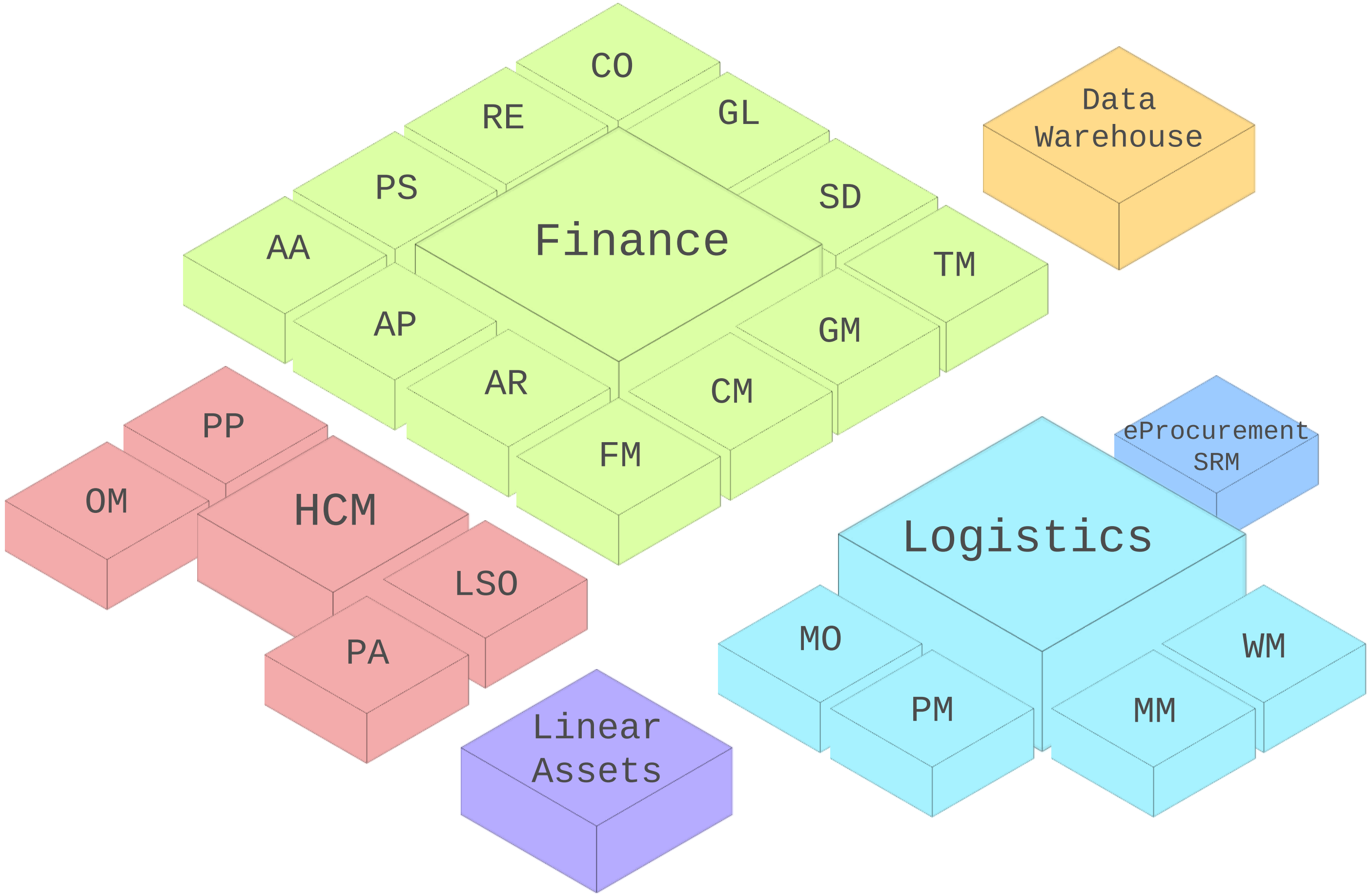
Functions of ECC

This lesson is designed to familiarize you with the functions of the **ECC**. It will provide information so that you should be able to:

- Define key ECC terms and concepts
- Identify the ECC module structure and how modules relate to each other
- Log on and off of ECC

LaGov ERP Overview

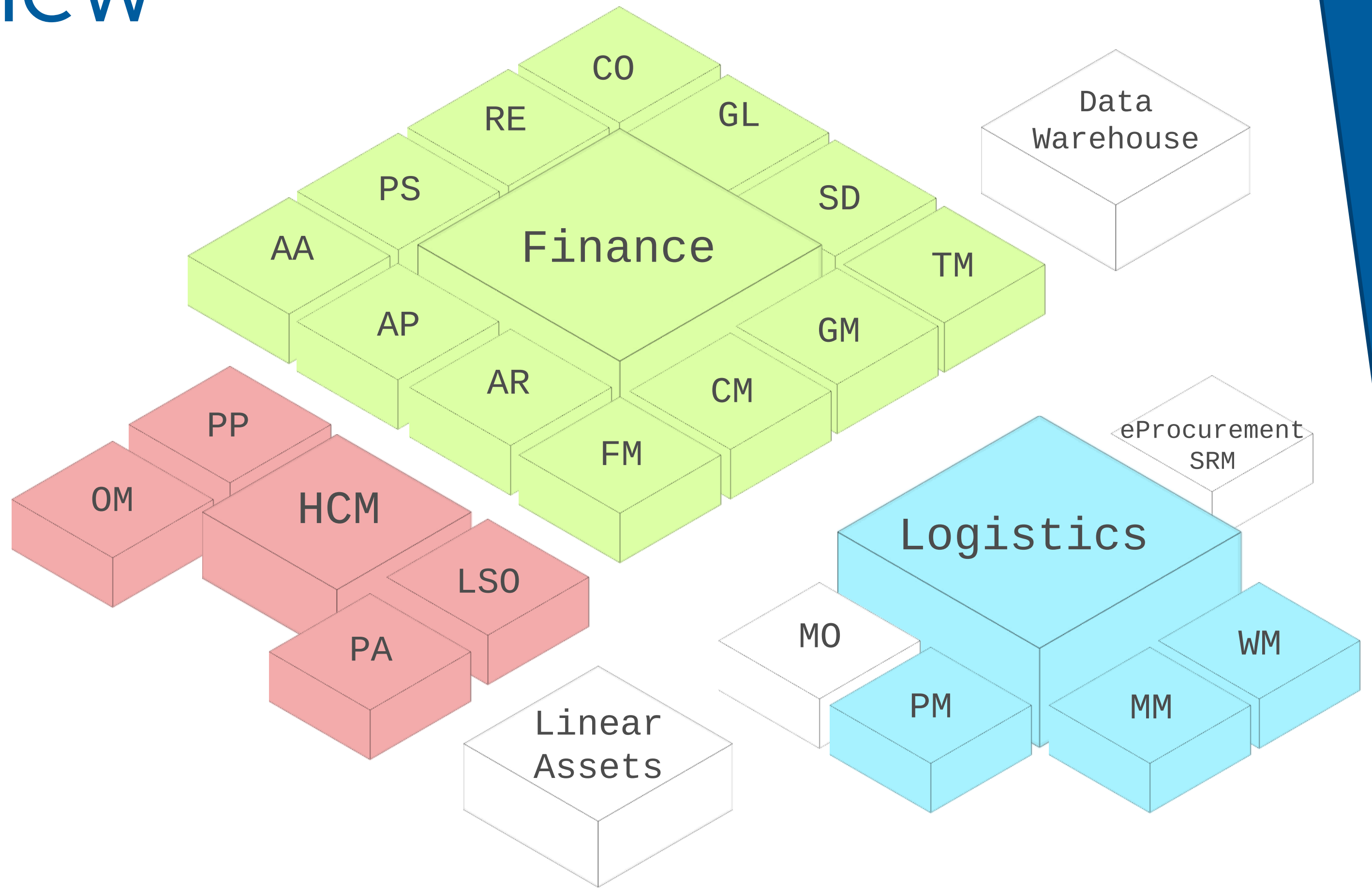
The LaGov ERP system consists of several integrated modules.



LaGov ERP Overview

The ECC is a group of modules in the LaGov ERP system that function under the foundation of the central component and enable a portion of the system to share master data.

Recall that *Master Data* allows for the integration of data across modules as well as open communication within and between LaGov functions.



Non-ECC modules have been grayed out

LaGov ERP Overview

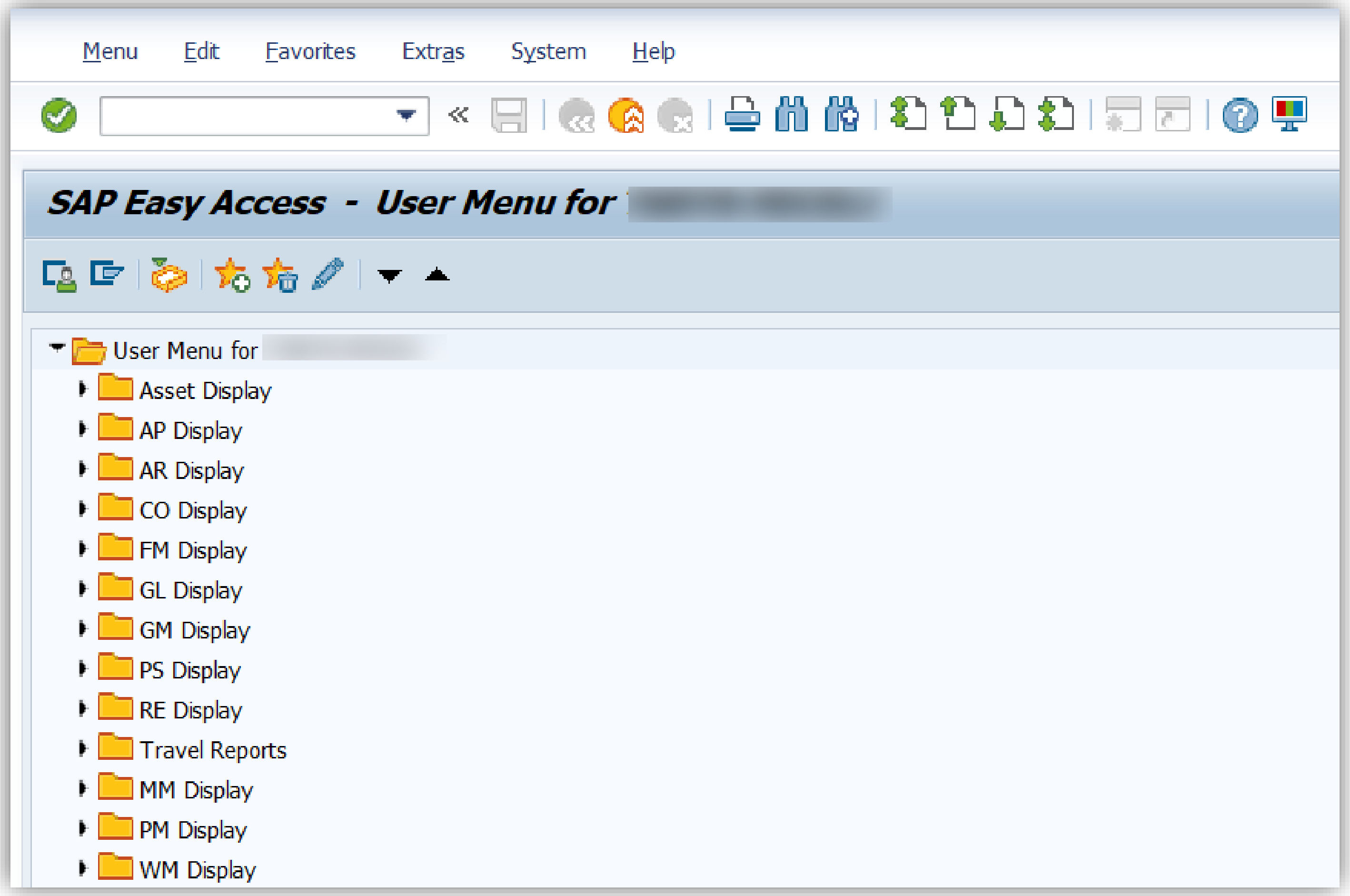
Remember that the ECC is like a department in a store:

- The ECC is one of the store 'entrances' to the LaGov ERP system.
- Even if you enter the 'store' through the ECC entrance, you can still access any of the 'merchandise', or data housed in other 'departments' or modules.
- Some of the 'merchandise' in the ECC is shared by other modules and can be accessed at any location, though one location will house the merchandise on their ‘shelves’.

Log In

The ECC will open in a new browser window.

- Since you are logged in to the LaGov ERP portal, you are automatically signed in to the ECC.



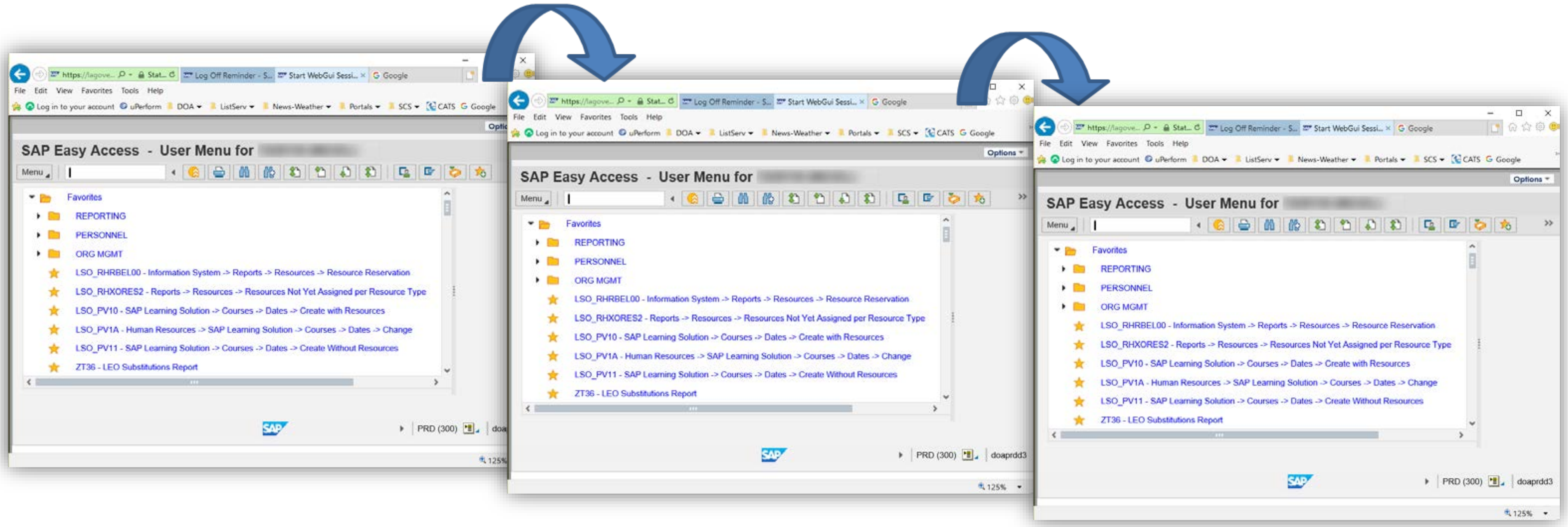
Sessions

A **session** is the term for the LaGov ERP screen that is in use

- A user can open more than one session at one time – no more than 6 is recommended to conserve system resources.

Having multiple sessions can be beneficial because it:

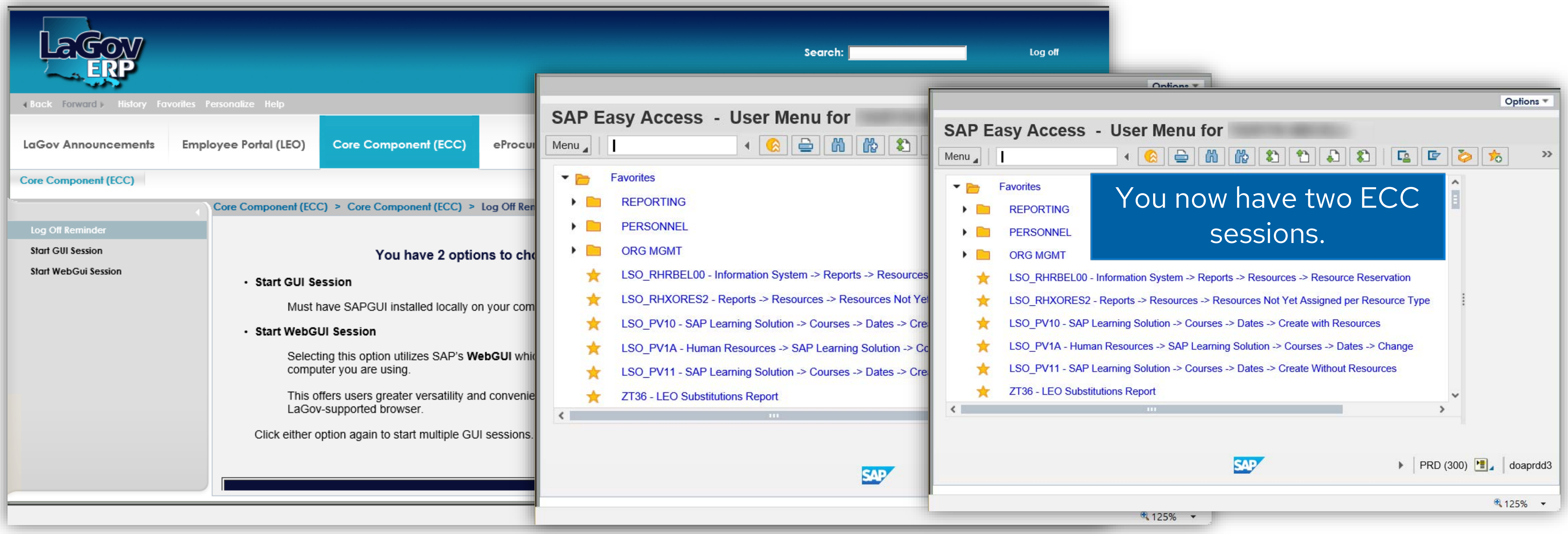
- Enables the user to perform multiple transactions within the ECC at one time (e.g. entering an invoice and viewing a PO).
- Reduces the need to jump from screen to screen.
- Locates key information during a transaction without having to cancel.



Create a New Session

You can create a session at any time and will not lose any data in a session that is already open.

To create a new session click the *"Start GUI Session"* option in the LaGov single sign-on portal.



Ending a Session

It is a good idea to end inactive sessions.

- Each session uses system resources that can affect how fast the ECC responds to your requests.
- The sessions are independent of each other and closing one will not close the others or remove their data.
- However, the system does **NOT** prompt you to save your data so click save before closing.

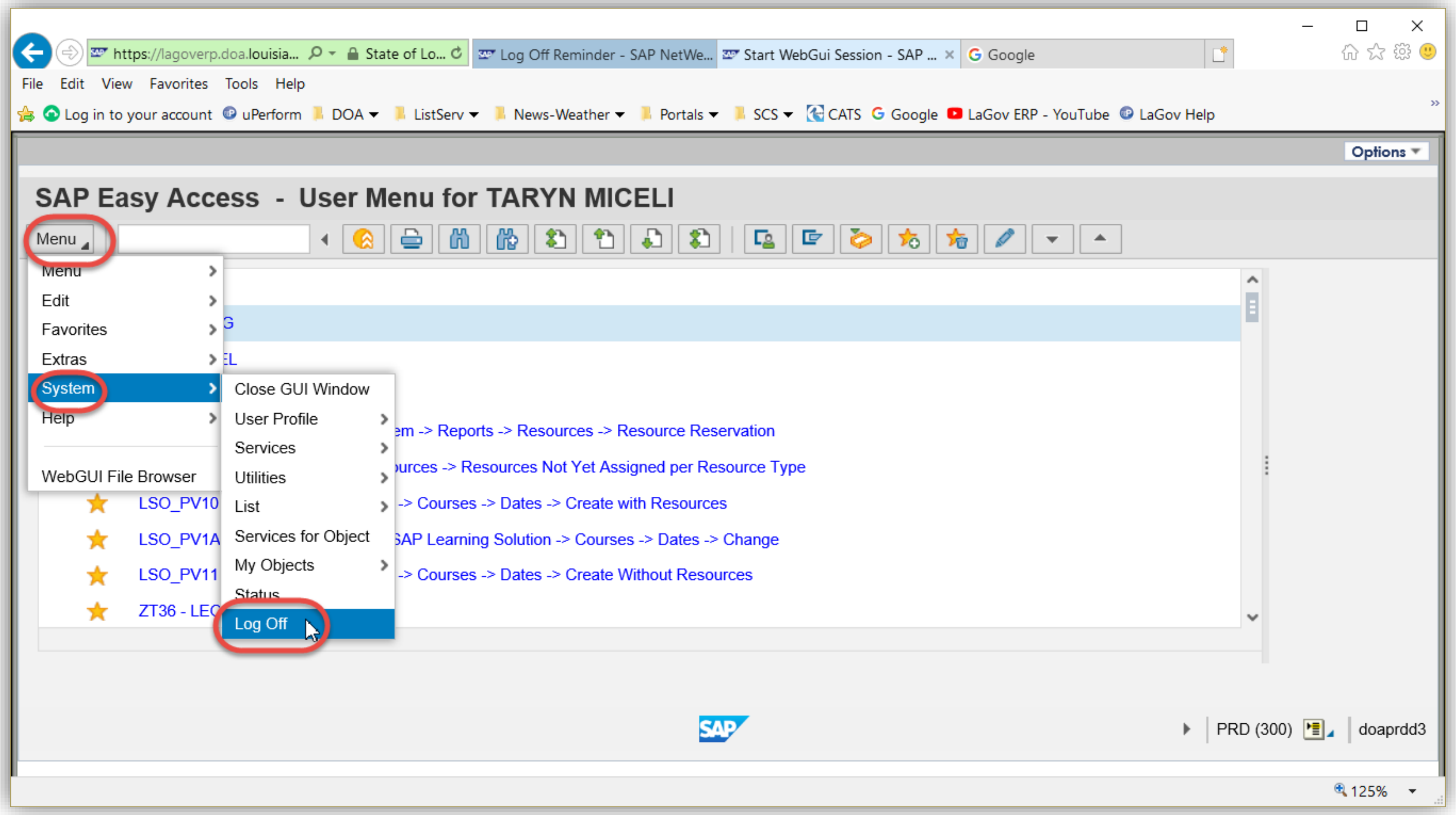
To close a session:

- Choose *System -> Logoff* from the Menu Bar, or
- Click the **Close** button  in the upper right-hand corner of the Internet Explorer window you wish to close.

Logging Out

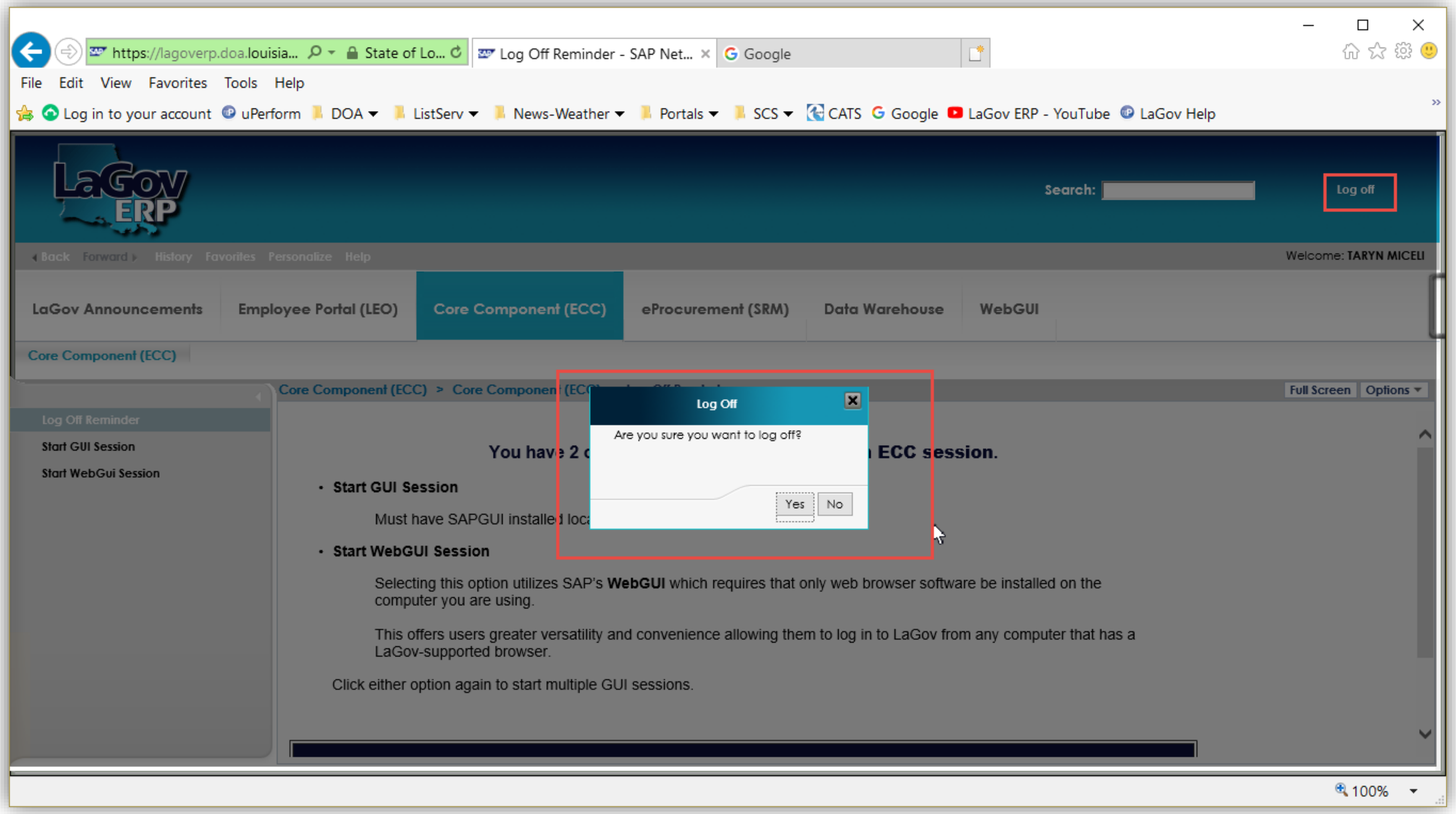
To **log out** of the ECC:

1. Click menu in the top navigation.
2. Select System, then *Logoff* from the drop-down menu.



Logging Out (cont'd)

3. Alternatively, you can select Log off on the top right and select Yes when you receive the Log off pop up box.



Logging In and Out

Some important details to know about logging in and out of the ECC:

- The ECC portal is independent of the other portals.

  NOTE: Starting an ECC session will not affect any other active session you may have open, e.g. an Employee Self Service session.

- Closing the ECC will not close the other active session you may have open.

- Closing the ECC will not close your LaGov ERP system access.
  - You must log out of the LaGov ERP system separately.

Maintaining Passwords

Keep in mind that data created, changed or deleted in LaGov ERP can be traced back to the user ID that performed the activity.

For this reason, it is very important for system users to keep their password confidential.

It's also important, once logged on, to never leave an active session unattended. Lock your computer if you have to briefly step away from your computer.

And when you finish your work, as suggested in the previous lesson, be sure you terminate all active LaGov sessions.

SAP Easy Access Menu

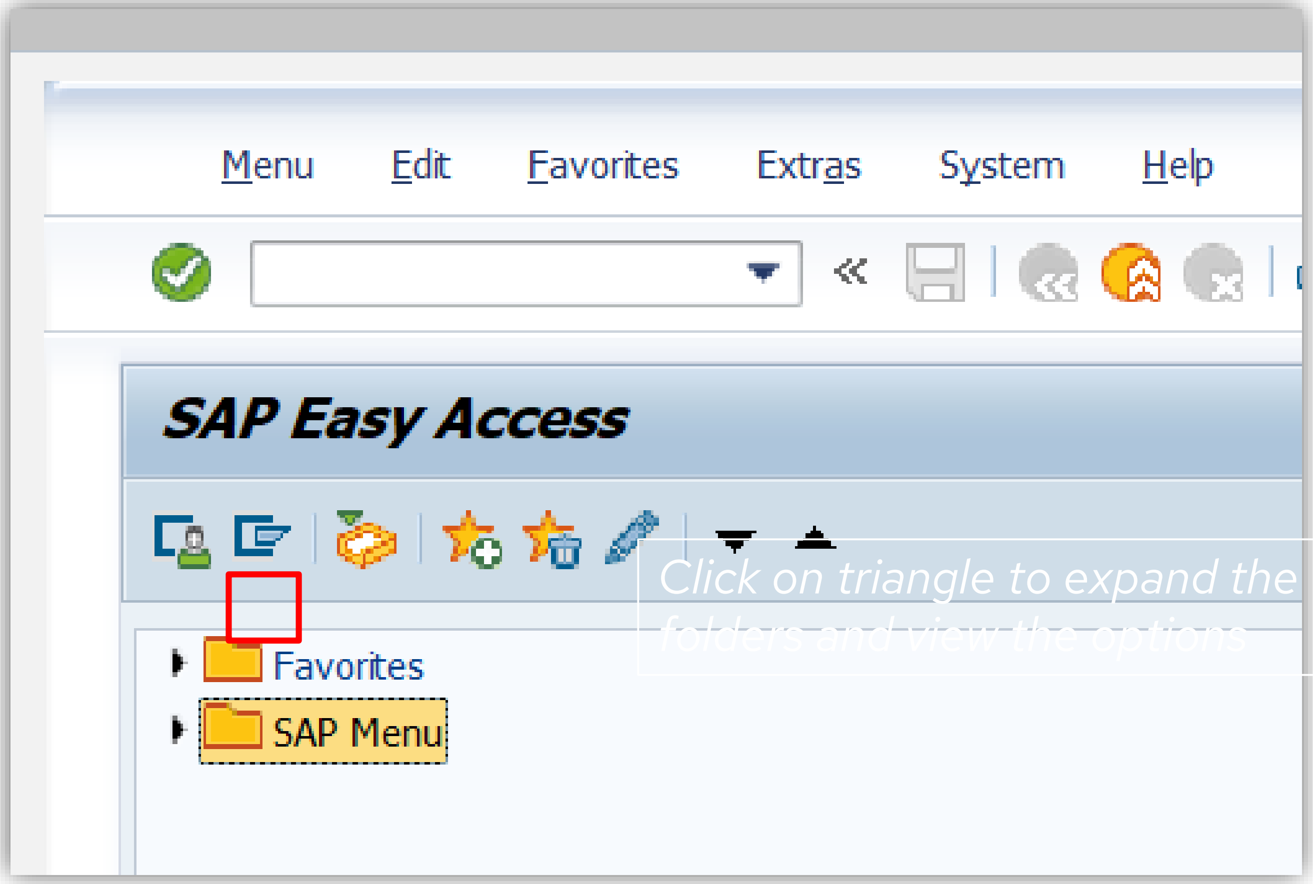
This lesson has been designed to familiarize you with the functions of the **SAP Easy Access Menu**. It will provide information so that you should be able to:

- Define key terms and concepts.
- Identify the menus and toolbars.
- Navigate through SAP Menu and User Menu.
- Create, Navigate and close a session.
- Identify Status Bar messages and functions.

Navigation Area

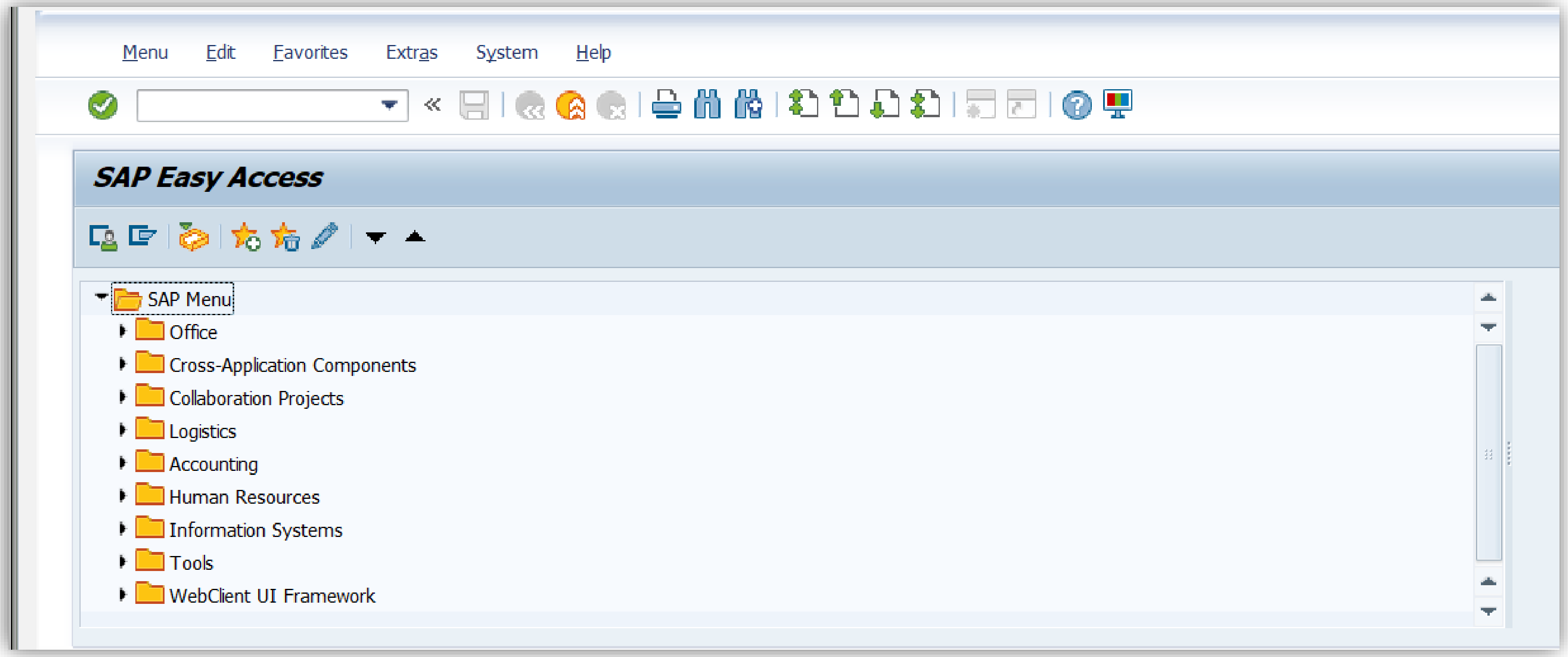
The **Navigation Area** is where the activity occurs in the ECC.

- Here is where you will see either the **SAP Menu** or the **User Menu.**
- Transactions are also performed in this area.



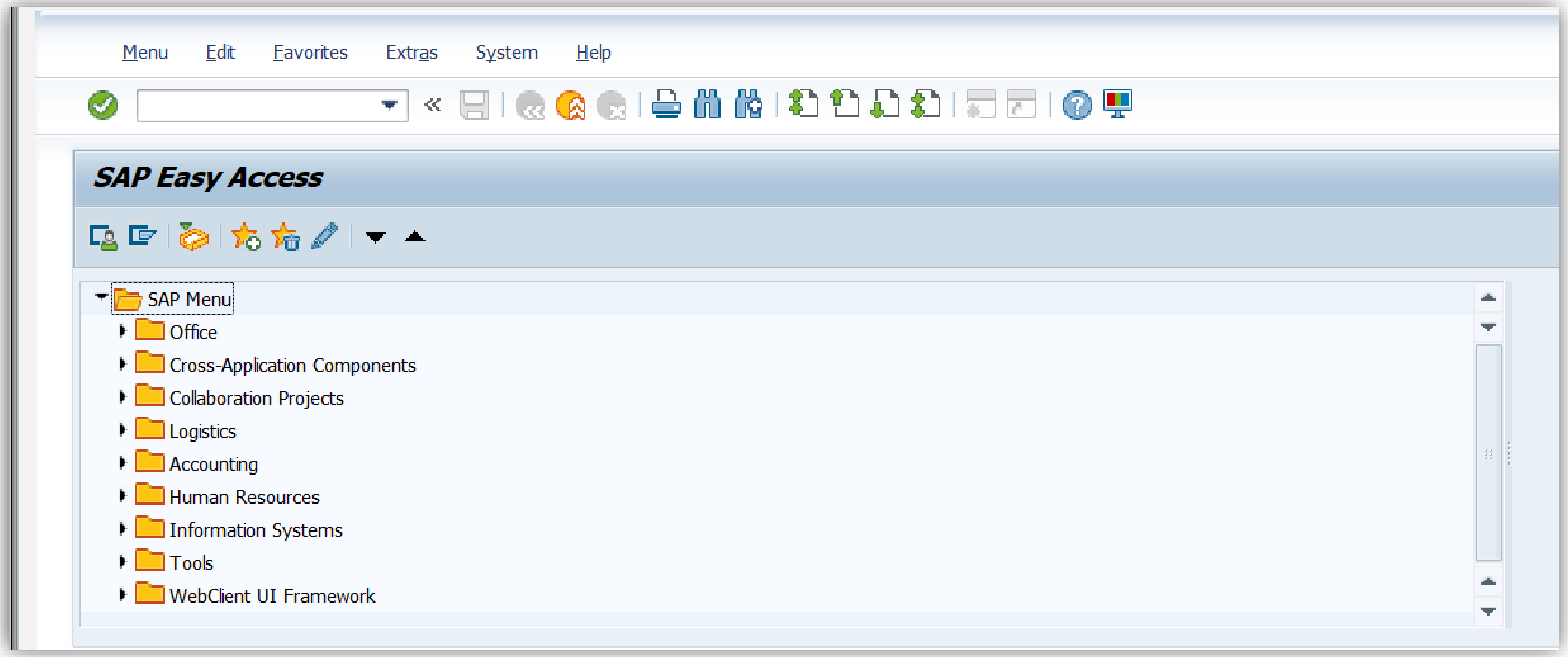
SAP Easy Access Menu Elements

The Menu Bar includes both generic and transaction specific menu items - These items change according to active screen.



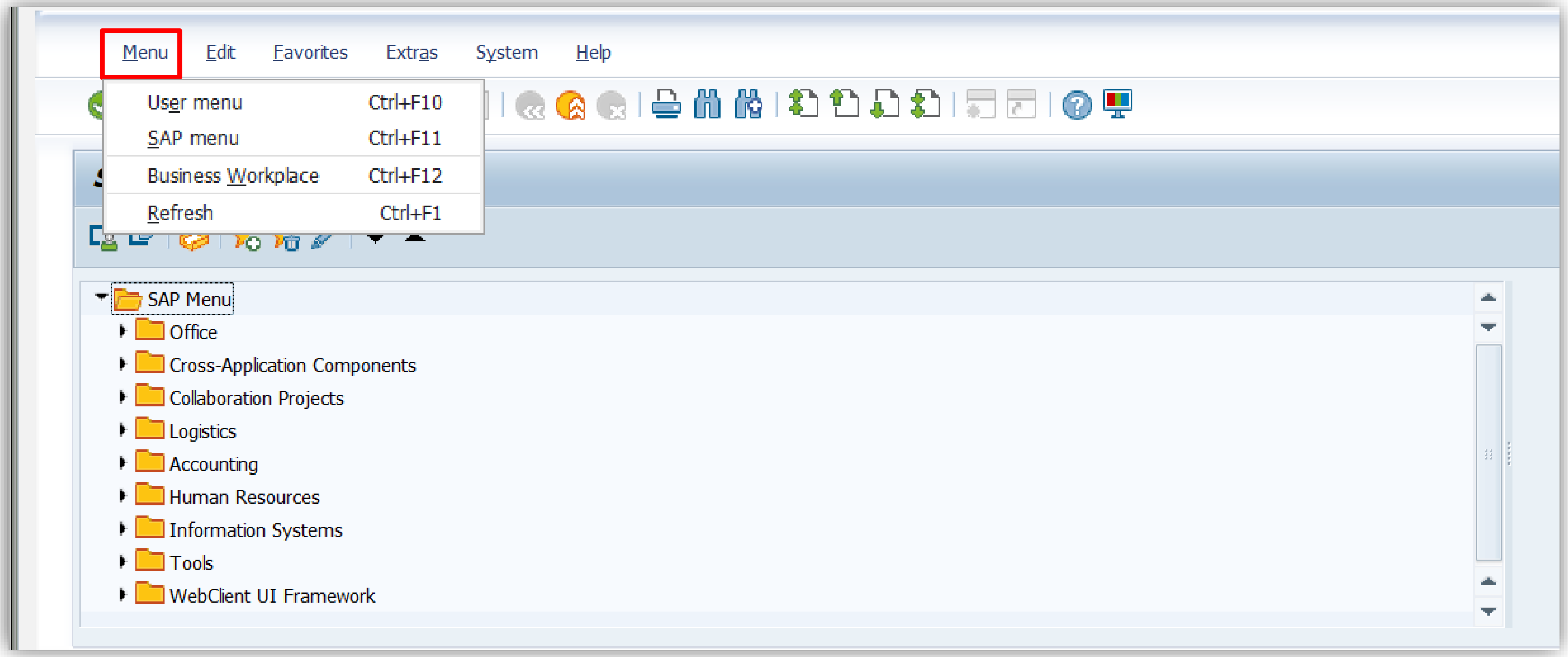
SAP Easy Access Menu Elements

Let’s explore the different elements on the screen!



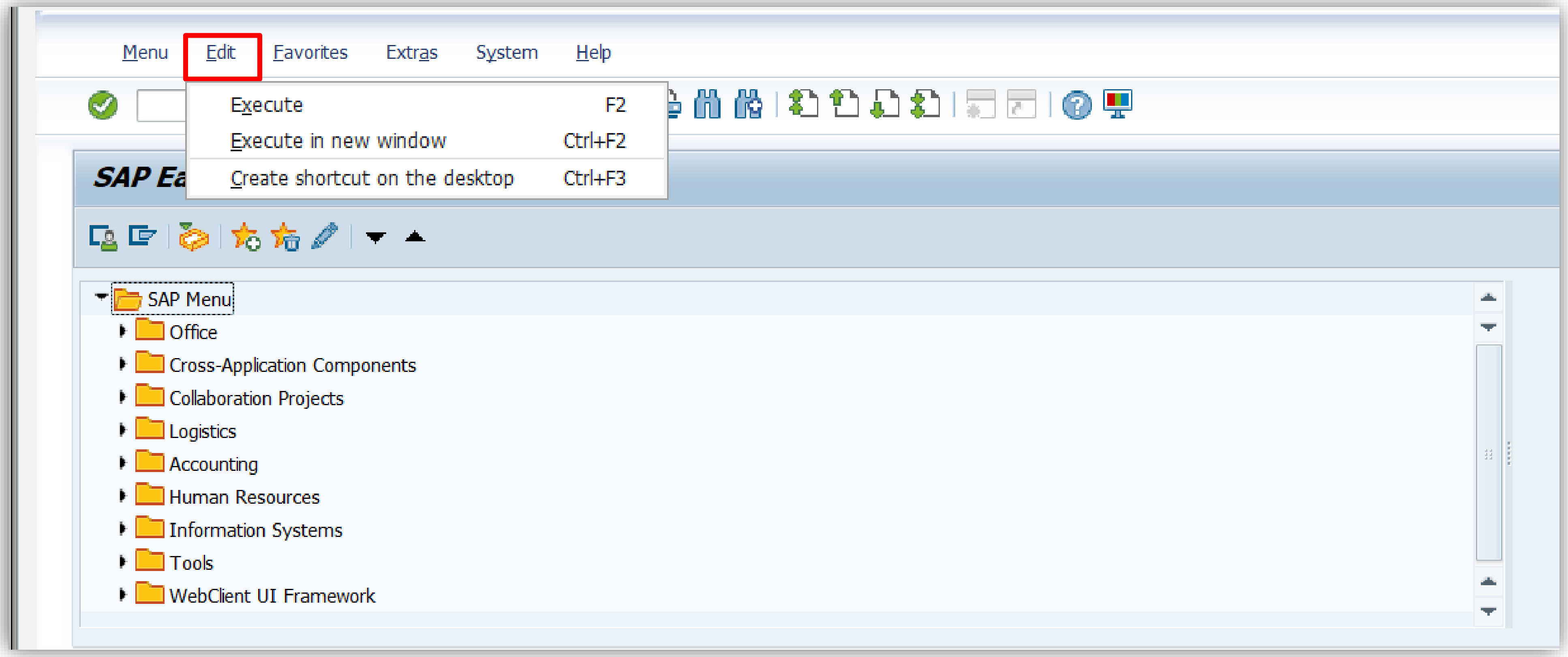
Menu

Menu offer another way to switch between the User menu and the SAP menu.



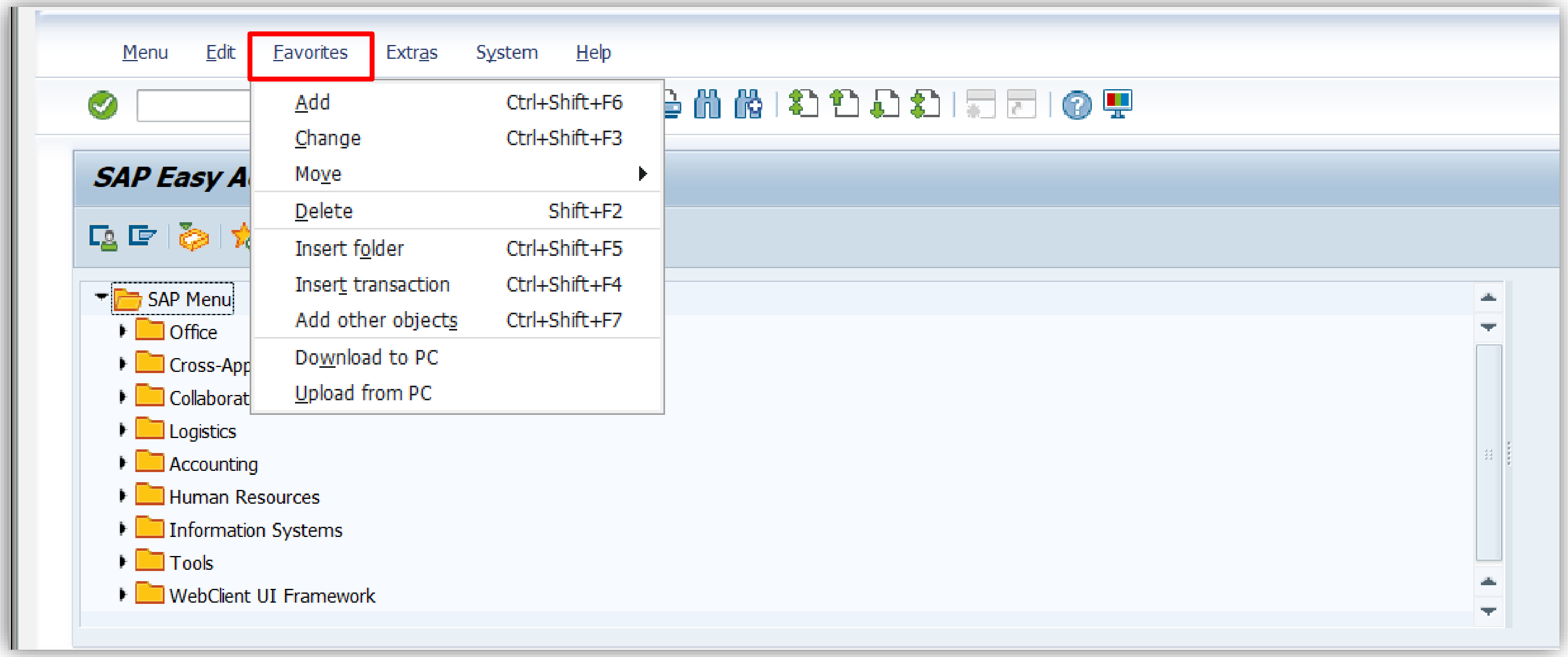
Edit

Edit includes Execute, Execute in new window, and Create shortcut on the desktop.



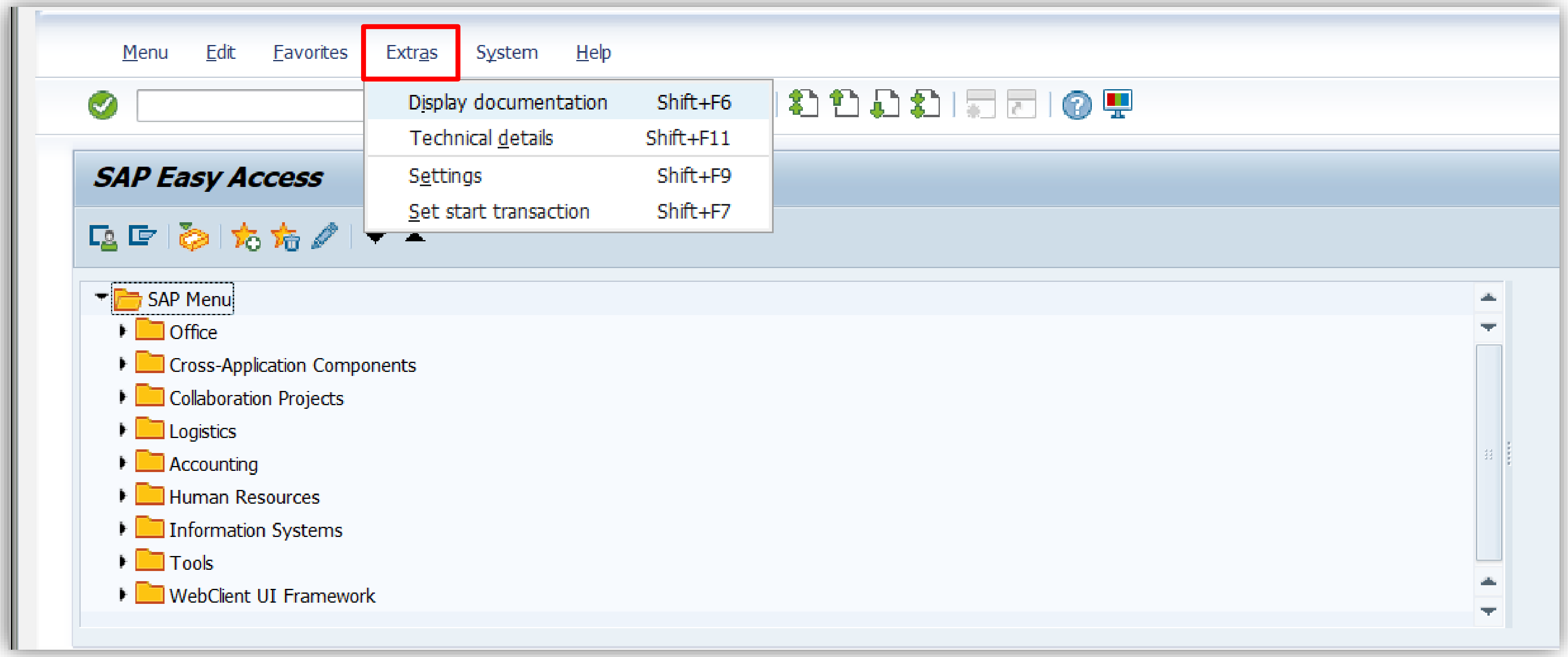
Favorites

Favorites is where you can add, remove, and manage your favorites.



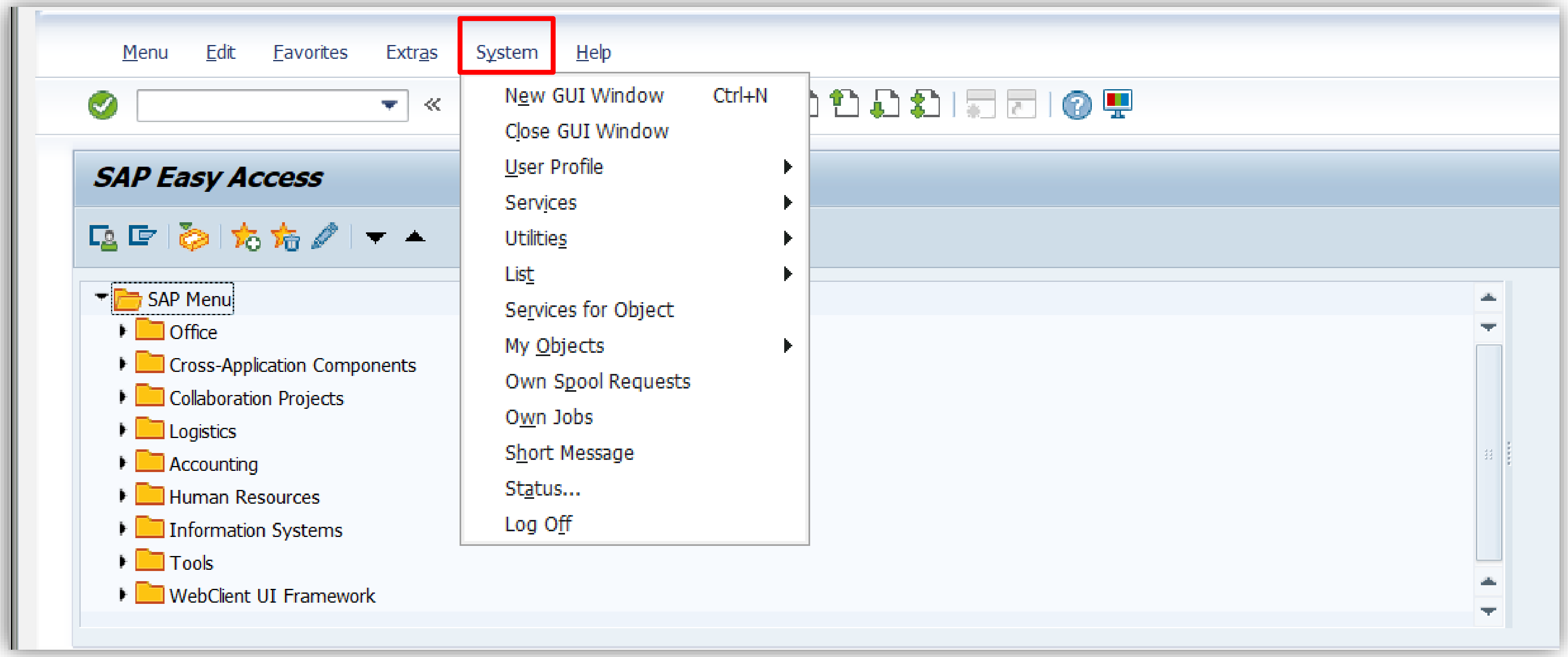
Extras

Extras include Display documentation, Technical details, and Settings.



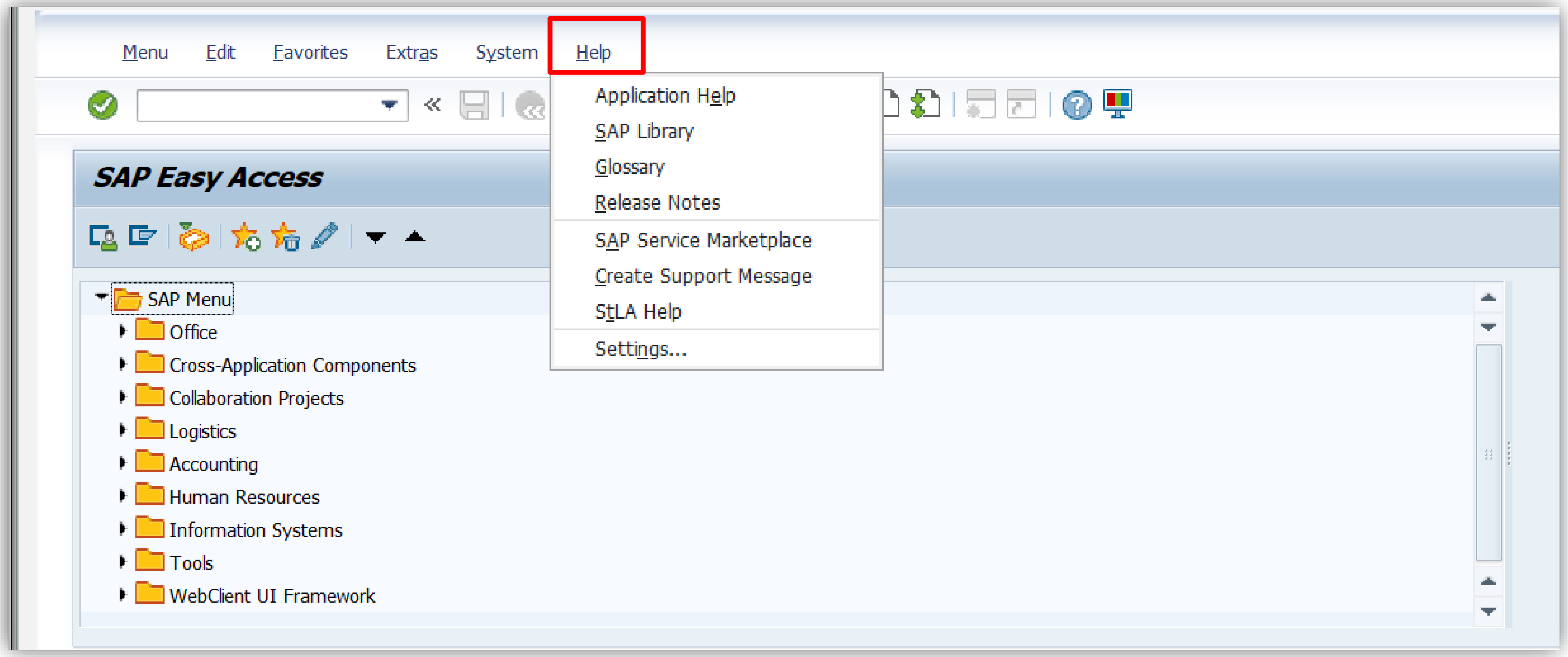
System

System includes a number of commands, such as New GUI Window, Close GUI Window, and Log Off.



Help

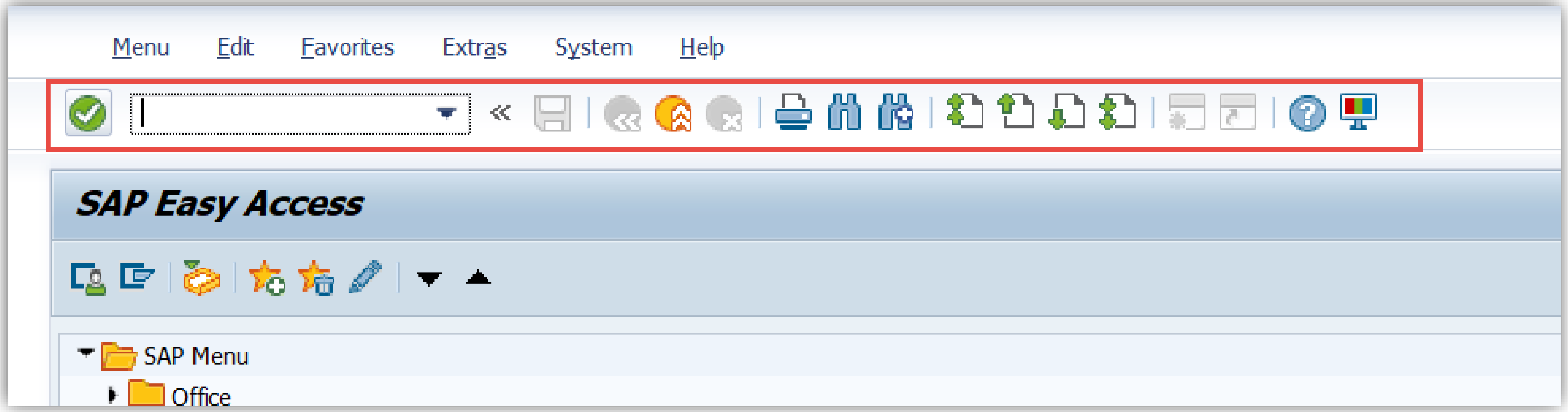
StLA Help is located under Help. It contains resources specifically developed for LaGov ECC.



Standard Toolbar

The **Standard Toolbar**, located below the Menu Bar, provides shortcuts for executing transactions and navigating within the ECC such as:

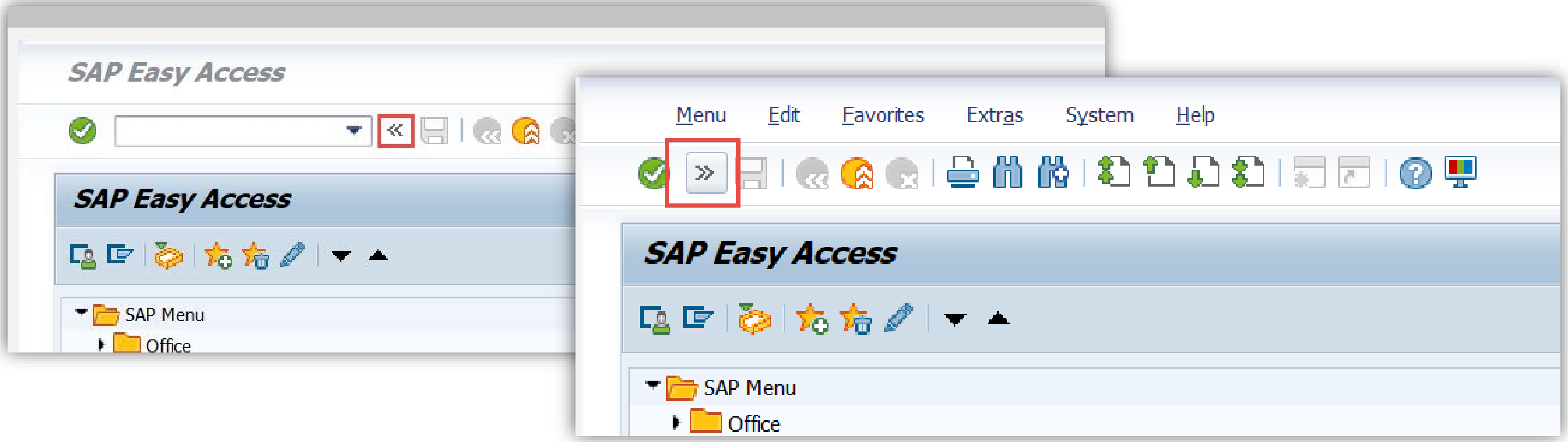
- Execute, exit, go back and cancel a transaction.
- Move through the screens.
- Customize the layout.



Command Field

The command field located on the standard toolbar to the right of the **Enter** button, allows users to access a transaction without drilling down through the menus.

- You can expand and collapse the command field by clicking the arrow to the right of it. Clicking the highlighted arrow expands and collapses the command field.



Standard Toolbar Buttons

The Enter Icon

Click on this button to confirm entries made in the input fields. Clicking on this button has the same effect as clicking on the ENTER button on the keyboard.

**This button does not save your work.

The Command Field

Allows you to enter commands and transaction codes to directly initiate tasks in the ECC.

The Save Icon

Click on this icon to save the entries made to a transaction, sometimes as the final step to complete the transaction.

The Exit Icon

Click on this icon to leave the current transaction. If you have not saved your data, you will be asked to save or exit without saving.

The Back Icon

Click on this icon to return to the previous screen. If you have not saved your data, you will be asked to save or go back without saving.

Standard Toolbar Buttons

Other buttons and their uses:

The Cancel Icon

Click on this icon to exit the current transaction without saving your data.

The Print Icon

Click on this icon to print the SAP document displayed on the screen.

The Find and Find Next Icons

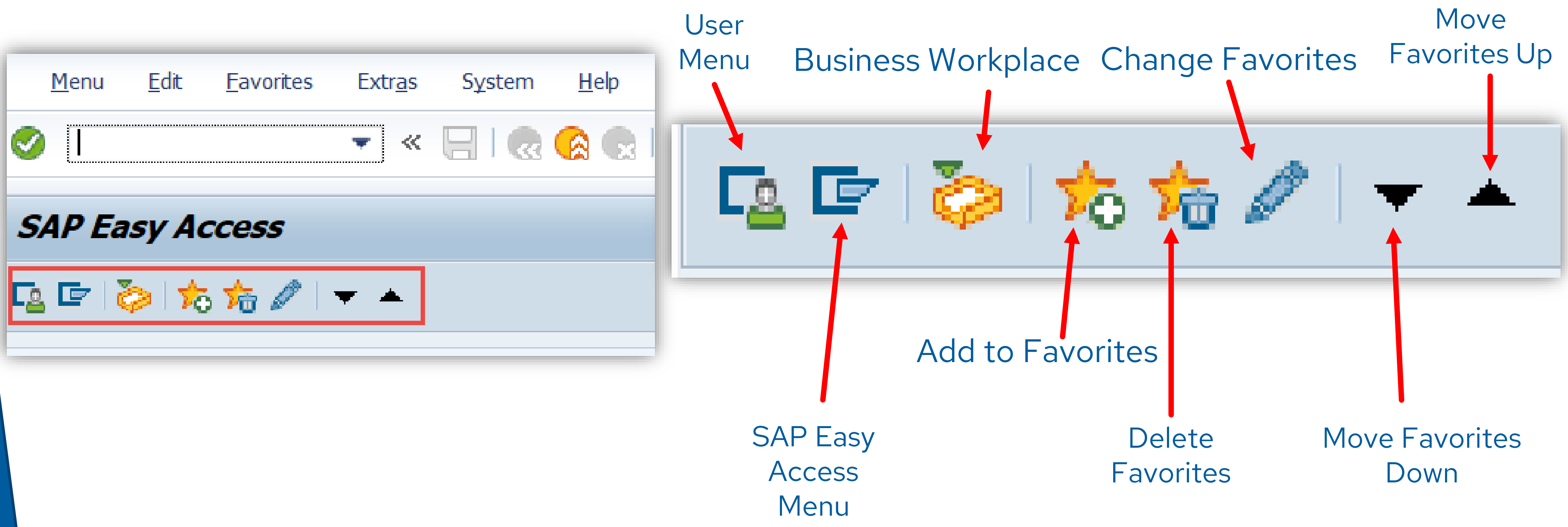
Click on these buttons to search for required data.

The Paging Keys

Use these keys to go to the first, previous, next and last screens of a transaction.

Application Toolbar

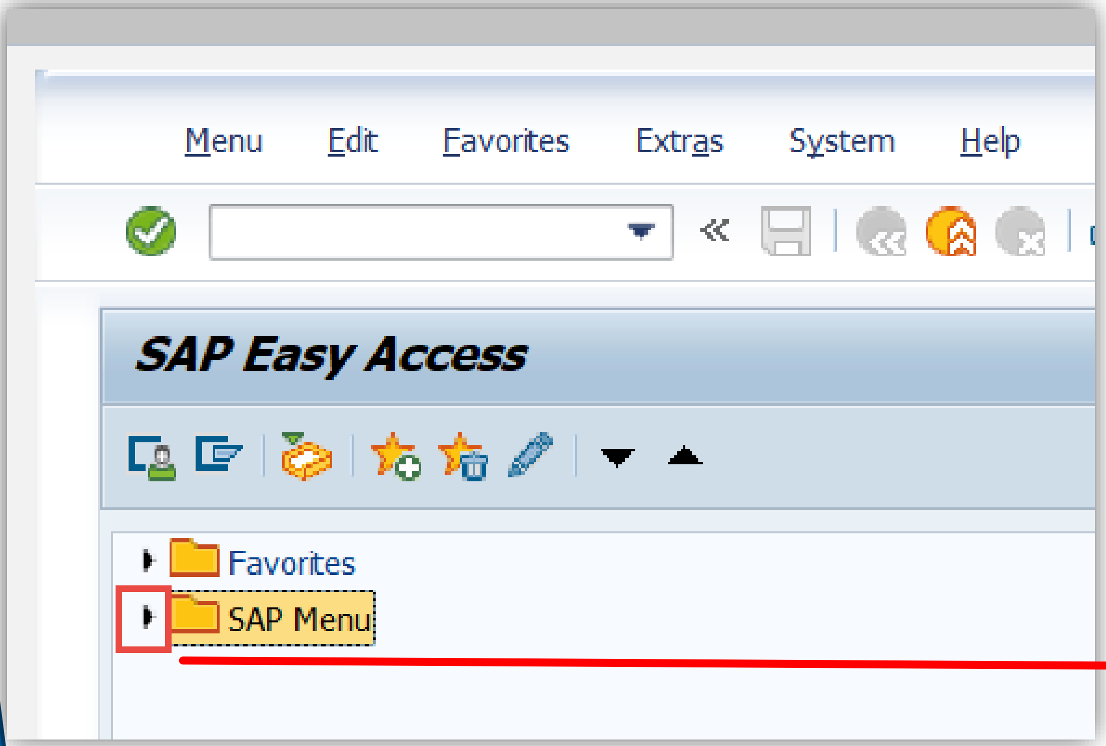
The **Application Toolbar** allows users to customize navigation of the system using shortcuts including adding tasks to the Favorites menu. (We will cover the Favorites menu later in the course).

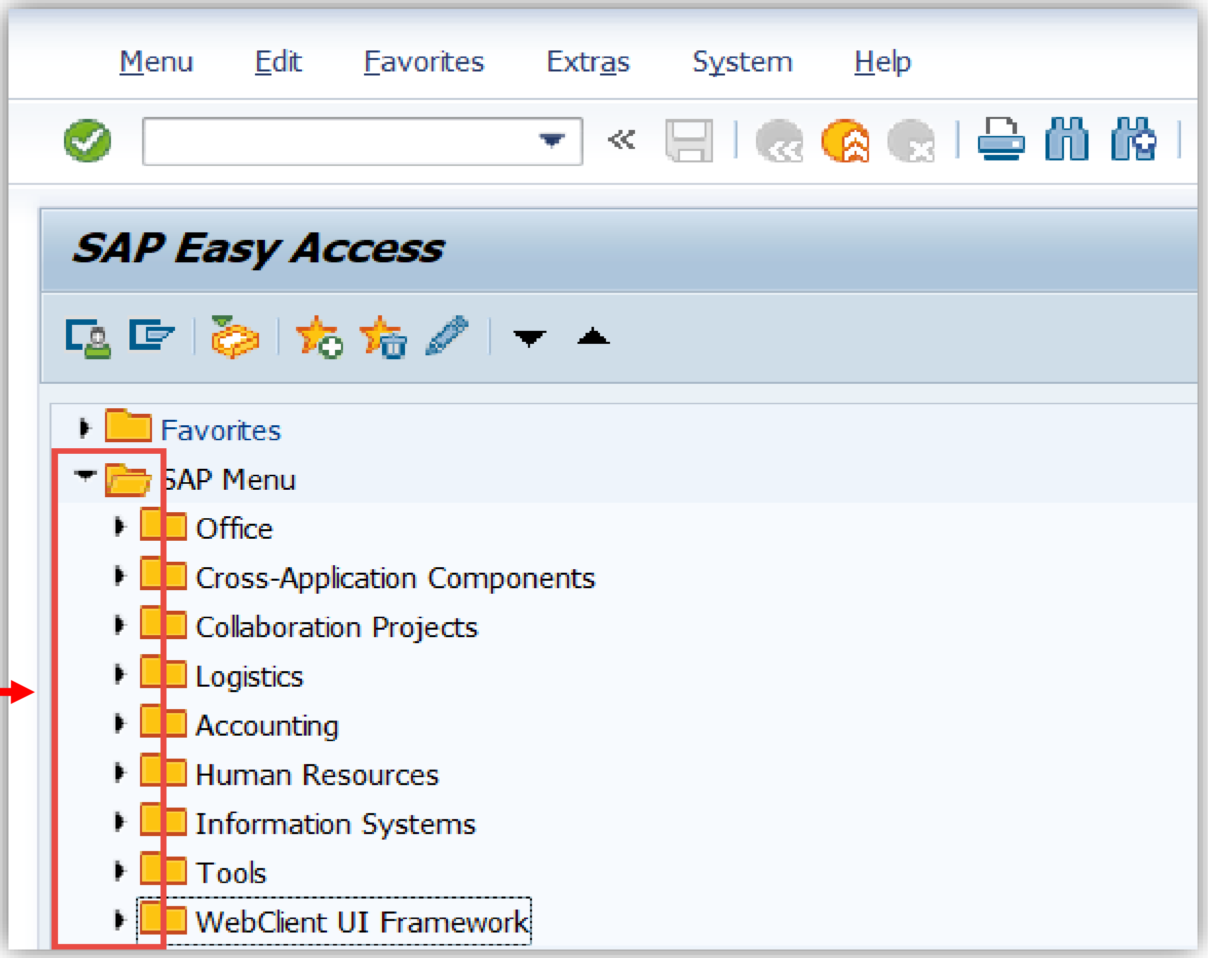


SAP Easy Access Menu

The **SAP Easy Access Menu** is the users point of entry into the ECC.

Clicking the arrow will expand or collapse the SAP Menu.



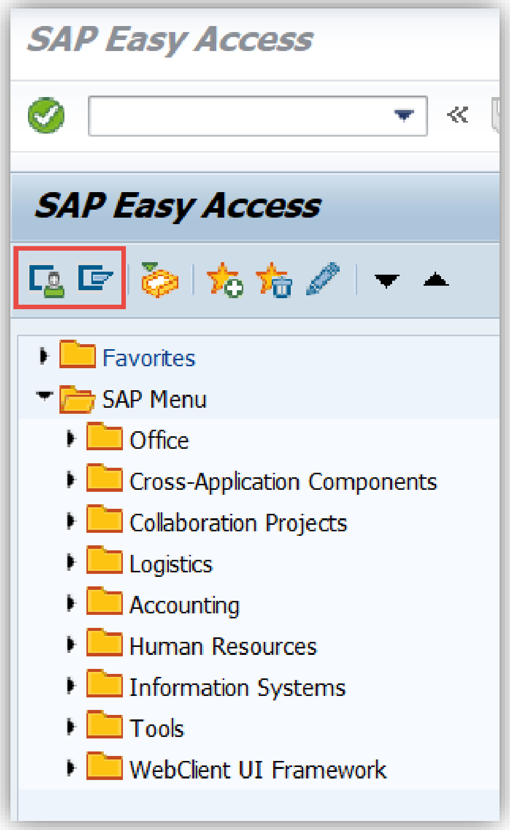


Toggle Between Menus

You can toggle between the User Menu and the SAP menu by clicking on the respective button.

Toggle between the screens by clicking the

SAP Menu button and the **User Menu** button.

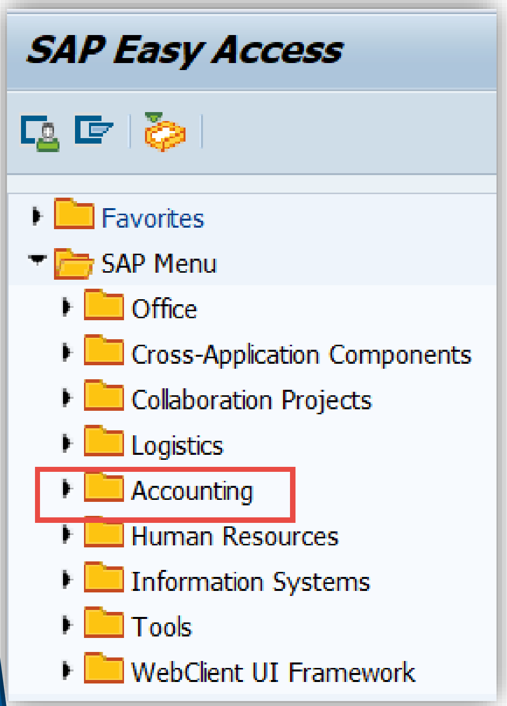


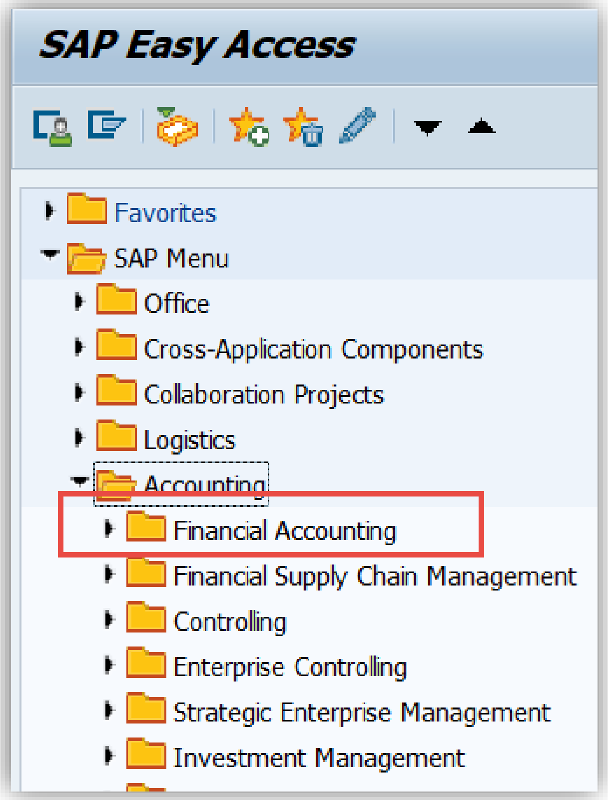
SAP Menu Functions

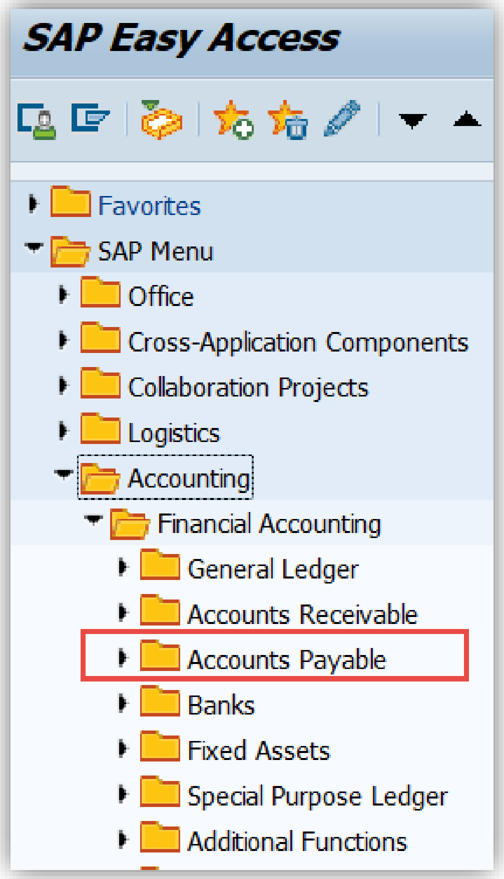
The **SAP Menu** lists the transactions or tasks that can be performed in LaGov ERP

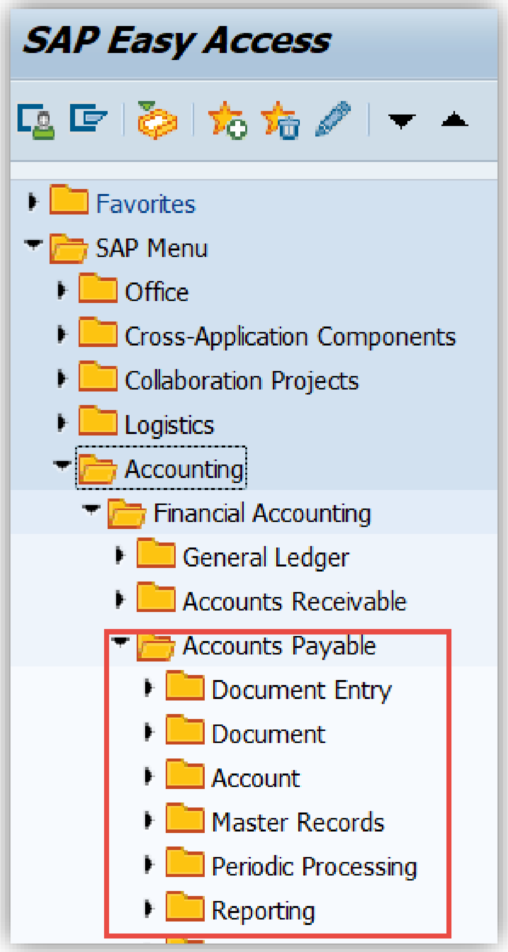
- Transactions are organized in folders and sub-folders.

You can drill down to the desired folder or transaction by clicking on the triangles to the left of the folders.





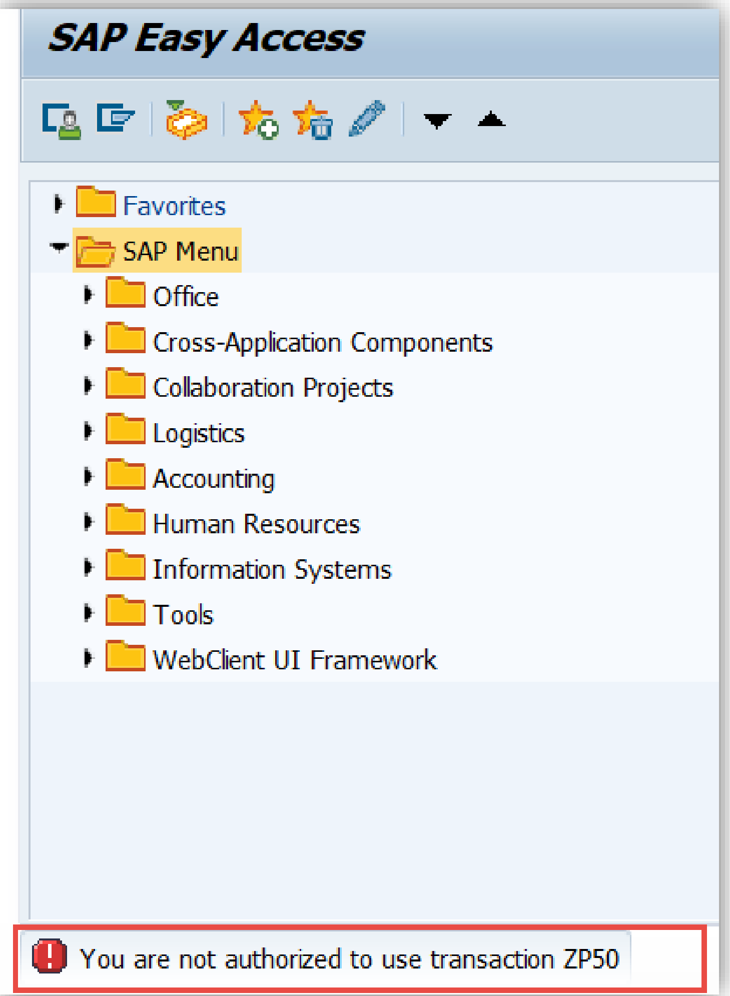


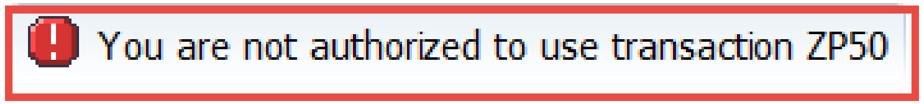


Status Bar

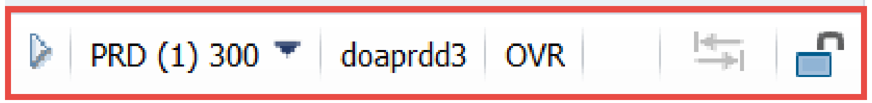
The **Status Bar** provides general system information related to:

- System notifications in the Message Area
- The ECC and Current transaction information in the Status Fields





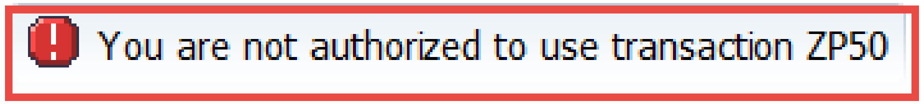
Message Area

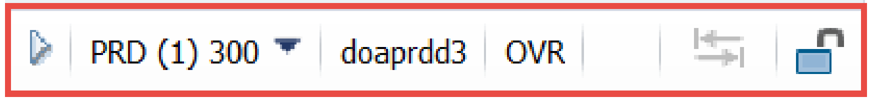


Status Fields

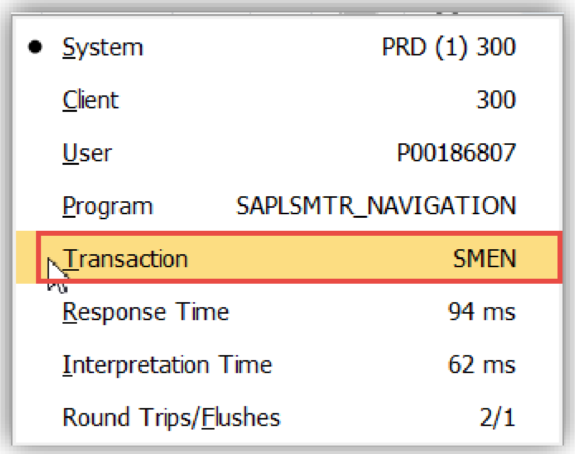
Status Bar Elements

Elements of the **Status Bar** include:





- Message indicators
  - identifies error messages that prevent you from proceeding
  - identifies warning or informational messages
  - identifies success, confirmation and notification messages
- Display arrows
  - hides (or displays) the status fields
  - displays the system information in the first status field such as:
    - System
    - Client
    - User
    - Program
    - Transaction
    - Response time



Customizing the User Menu

This lesson has been designed to familiarize you with **Customizing the User Menu**. It will provide information so that you should be able to:

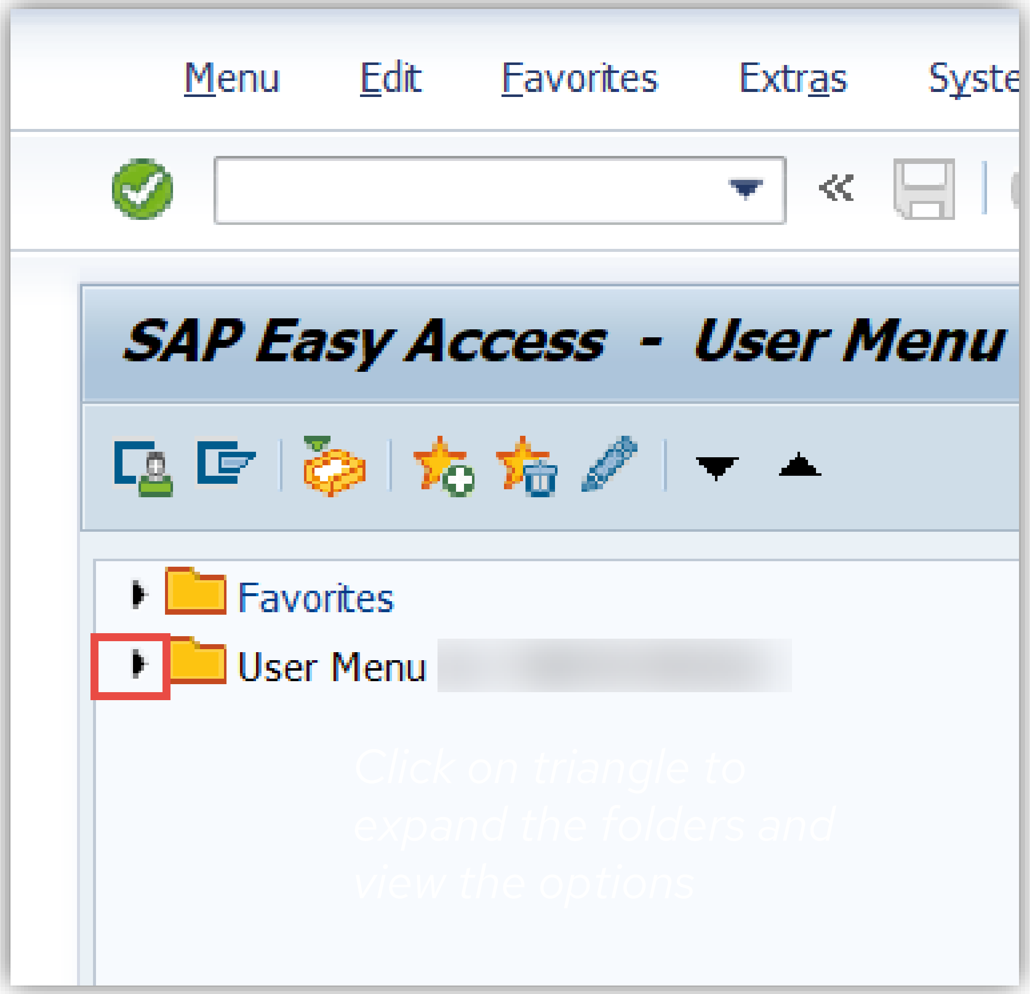
- Identify the User Menu
- Set Technical Names
- Create, Rename, Organize and Delete Favorites
- Insert a Favorites Folder
- Identify the **Customize Local Layout button and its functions**
- Modify the Design Settings, Font and Interface Color Scheme

User Menu

The User Menu reflects a user's working environment and consists of transactions, displays and/or reports.

Menu groupings are created based on the users' security roles in the ECC.

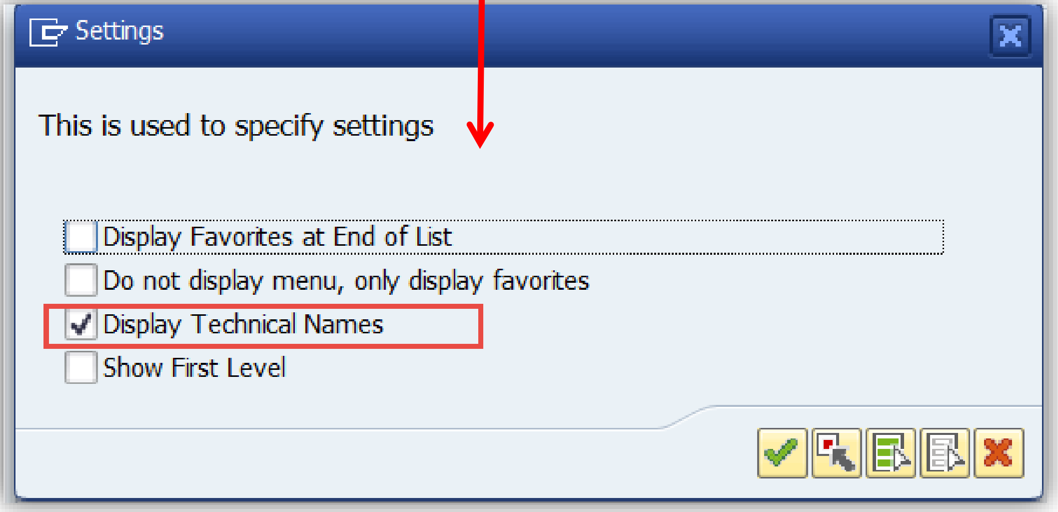
- If the user's role changes, the required changes will be made by a system administrator.

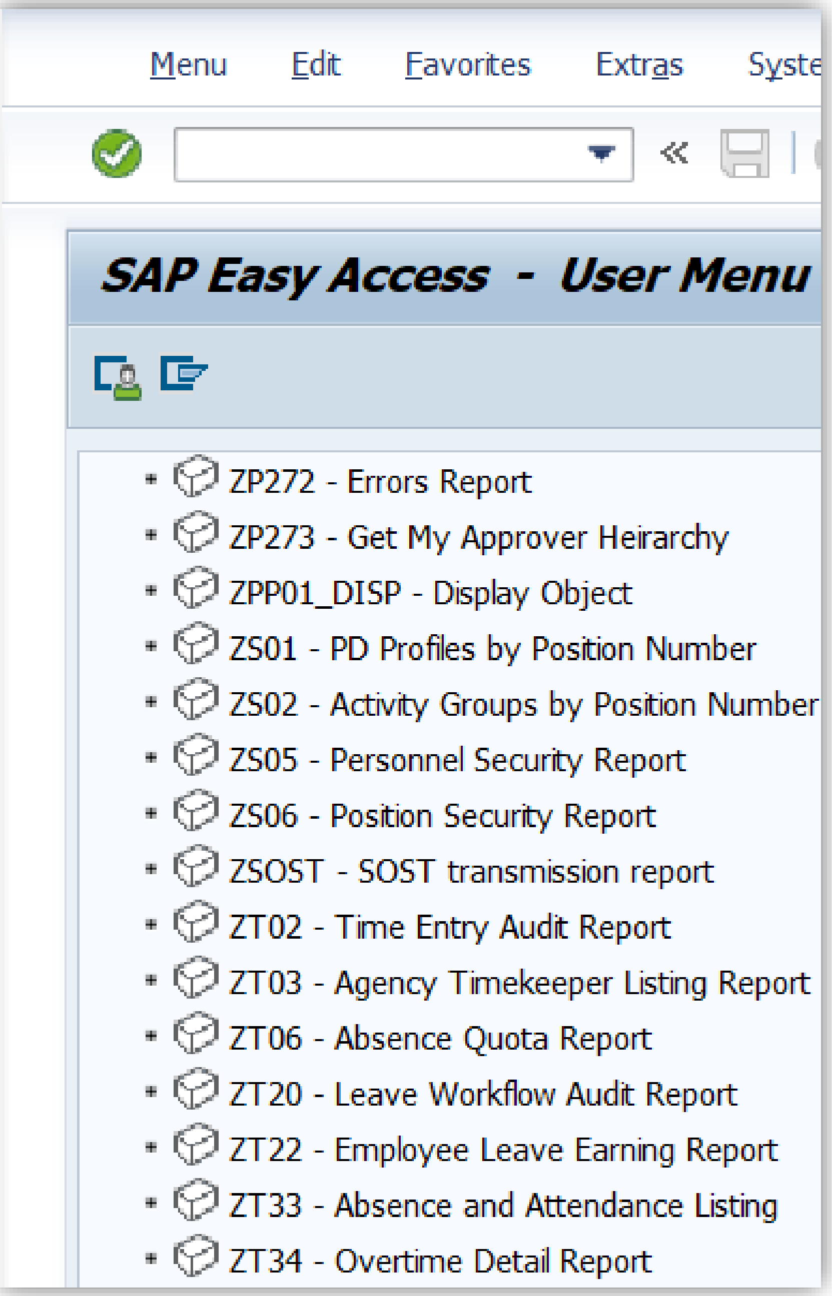


Technical Names

Tasks in the User Menu can be displayed with the ***name and transaction code.***

- You can do this by changing a setting in the User Menu to **Display Technical Names**

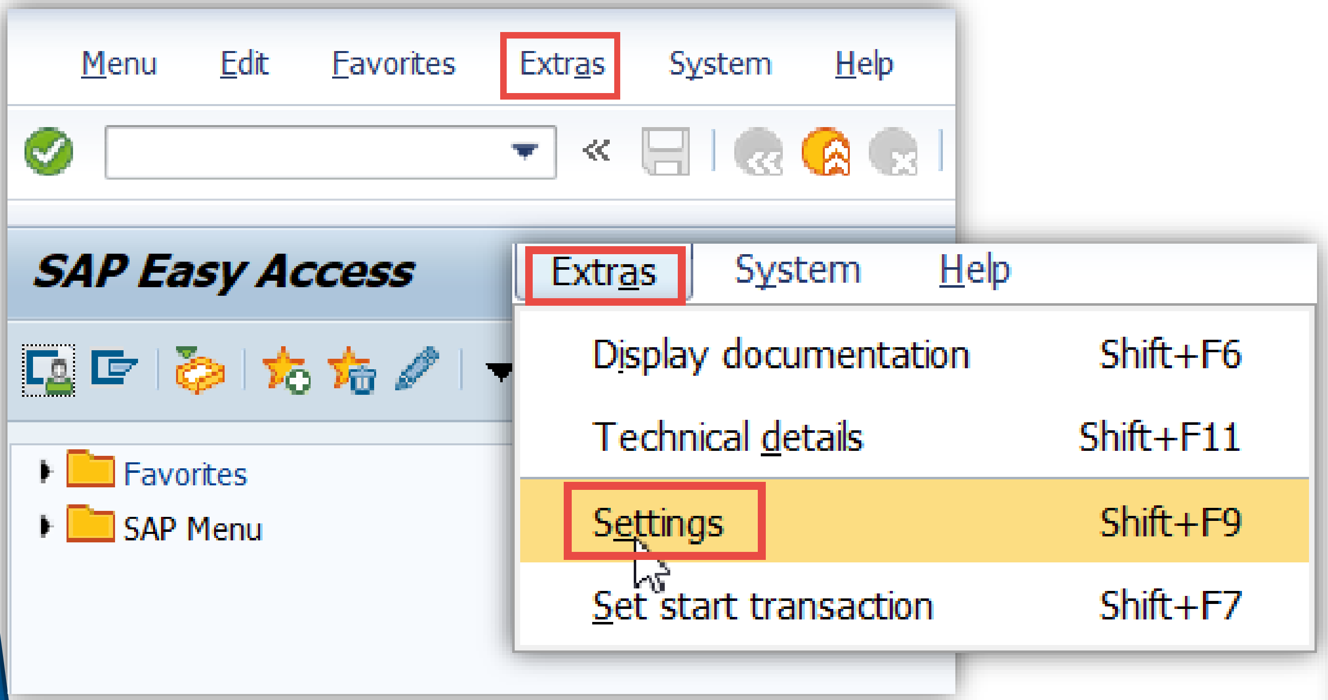


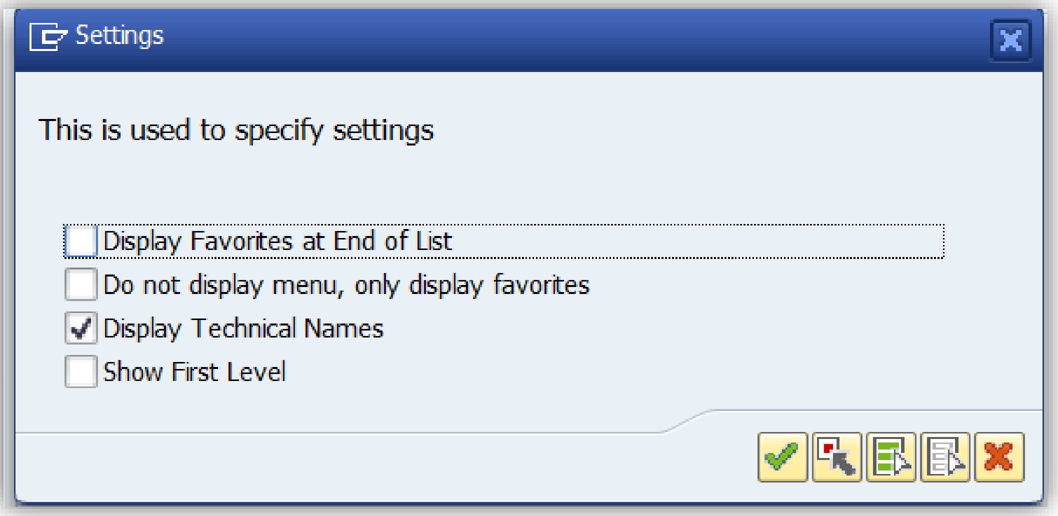


Set Technical Names

To set the technical name, use the menu path *Extras -> Settings.*

Once the Settings pop-up box is displayed, check *"Display technical names"* and press ***Enter*** or click the (Execute) button to save your changes.





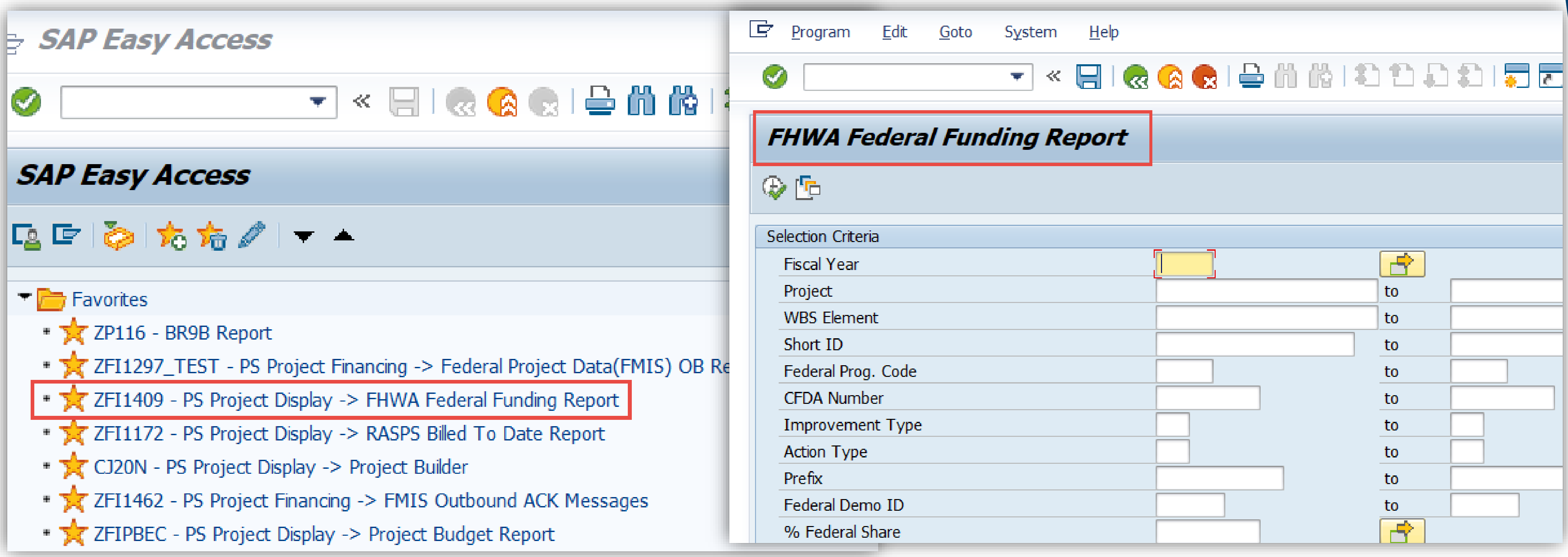
Favorites

The **Favorites Menu** can be used to store a list of your "favorites"; i.e., frequently used transaction codes or reports.

The “**Favorite”** transactions placed in this section become shortcuts to launching the transaction.

Favorites Menu

Instead of searching for the transaction in a folder or having to remember the transaction code and typing it in the command field, you can double-click on an item in the Favorites Menu to launch the transaction:

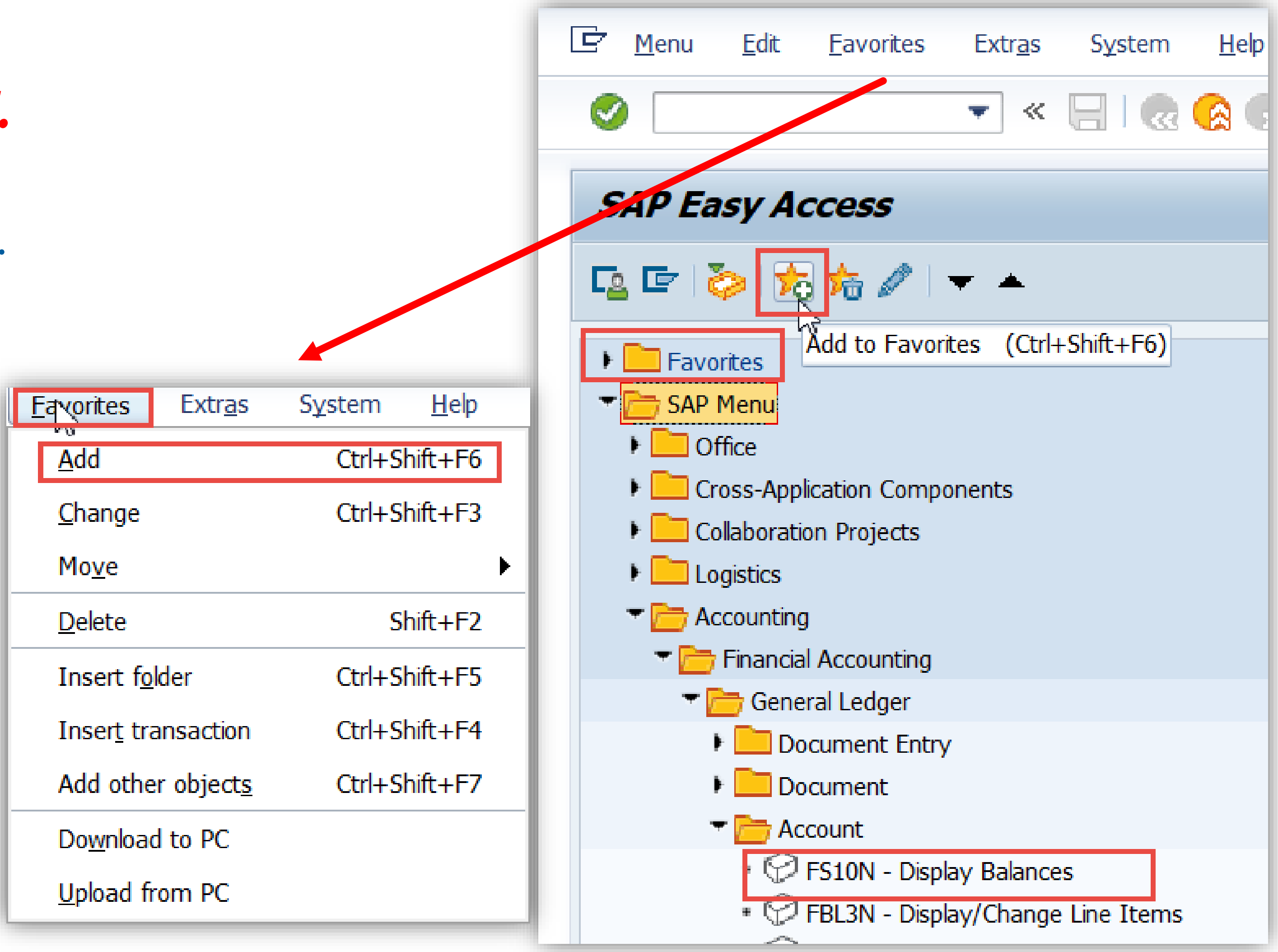


Add Favorites

Transactions may be easily added as a **Favorite** 4 different ways after selecting the transaction from your menu:

1. Go to the menu bar and follow the menu path ***Favorites > Add.***
2. Click the **Create Favorites** button in the application toolbar.
3. Highlight the transaction in the menu, **right click** it and select "Add to Favorites" from the list.
4. Drag-and-drop the transaction directly into your Favorites folder.

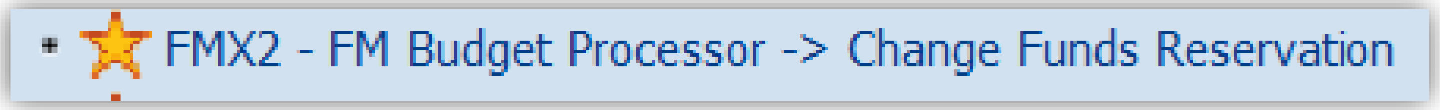
*Transactions may also be inserted into your favorites menu by selecting **Favorites** > **Insert Transaction** > Type the **Transaction Code** in the pop-up Box and press **Enter**.*



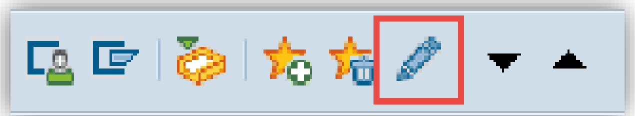
Rename Favorites

You can re-name your favorite using the steps below:

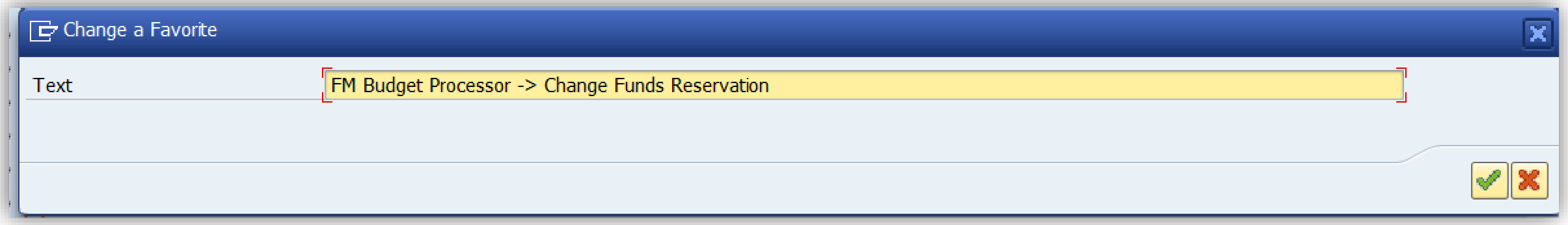
1. Click to select the favorite to be changed.



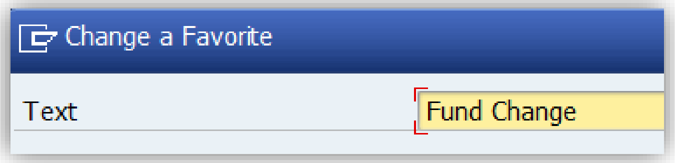
2. Click the **Change** button in the application toolbar.

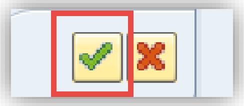


3. Once the **Change a favorite** window is displayed, enter the new name for your favorite.



4. Click the **Continue** button to complete your changes.

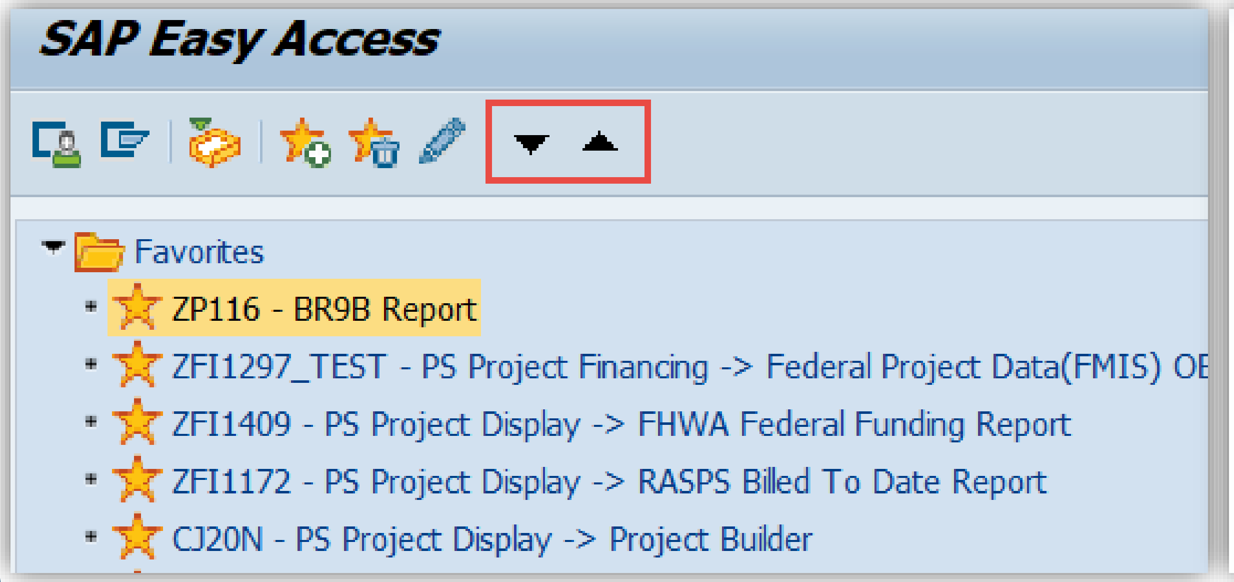


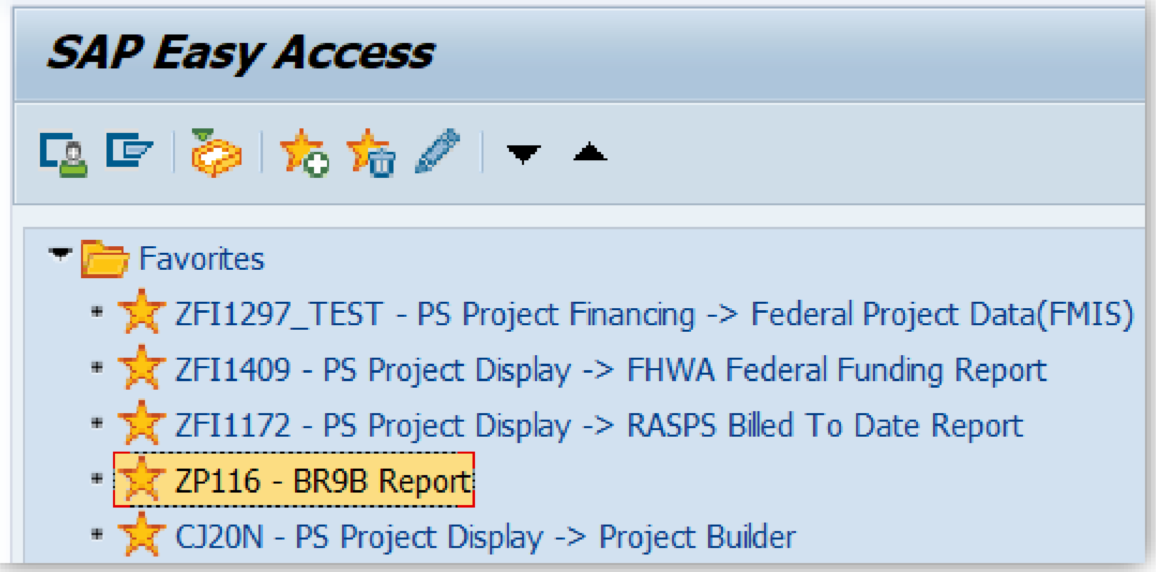


Organize Favorites

You can re-order the transactions in your **Favorites** folder, for example put them in alphabetical or sequential order:

1. Highlight the favorite to be moved.
2. Click the **Move Favorite Down** or **Move Favorite Up** button in the application toolbar to change the position of the highlighted favorite in the list.



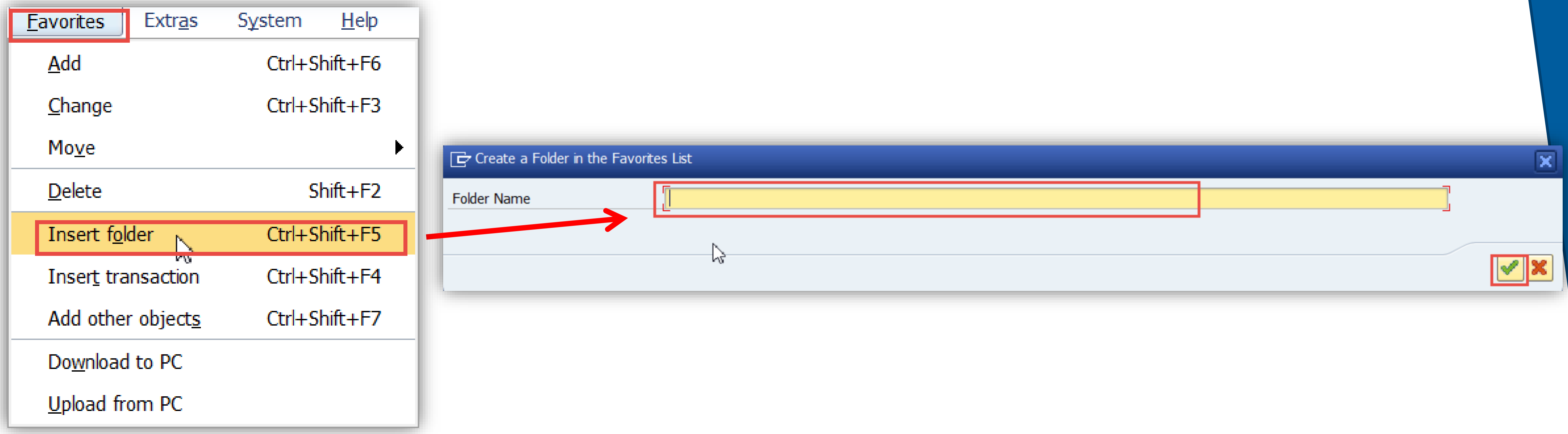


Create New Favorites Folder

You can create folders to organize your favorites into groups, e.g. by job responsibility or function.

To **create a Favorites folder:**

1. Follow the menu path *Favorites > Insert folder.*
2. In the new window, type the folder name and click the **Continue** button.



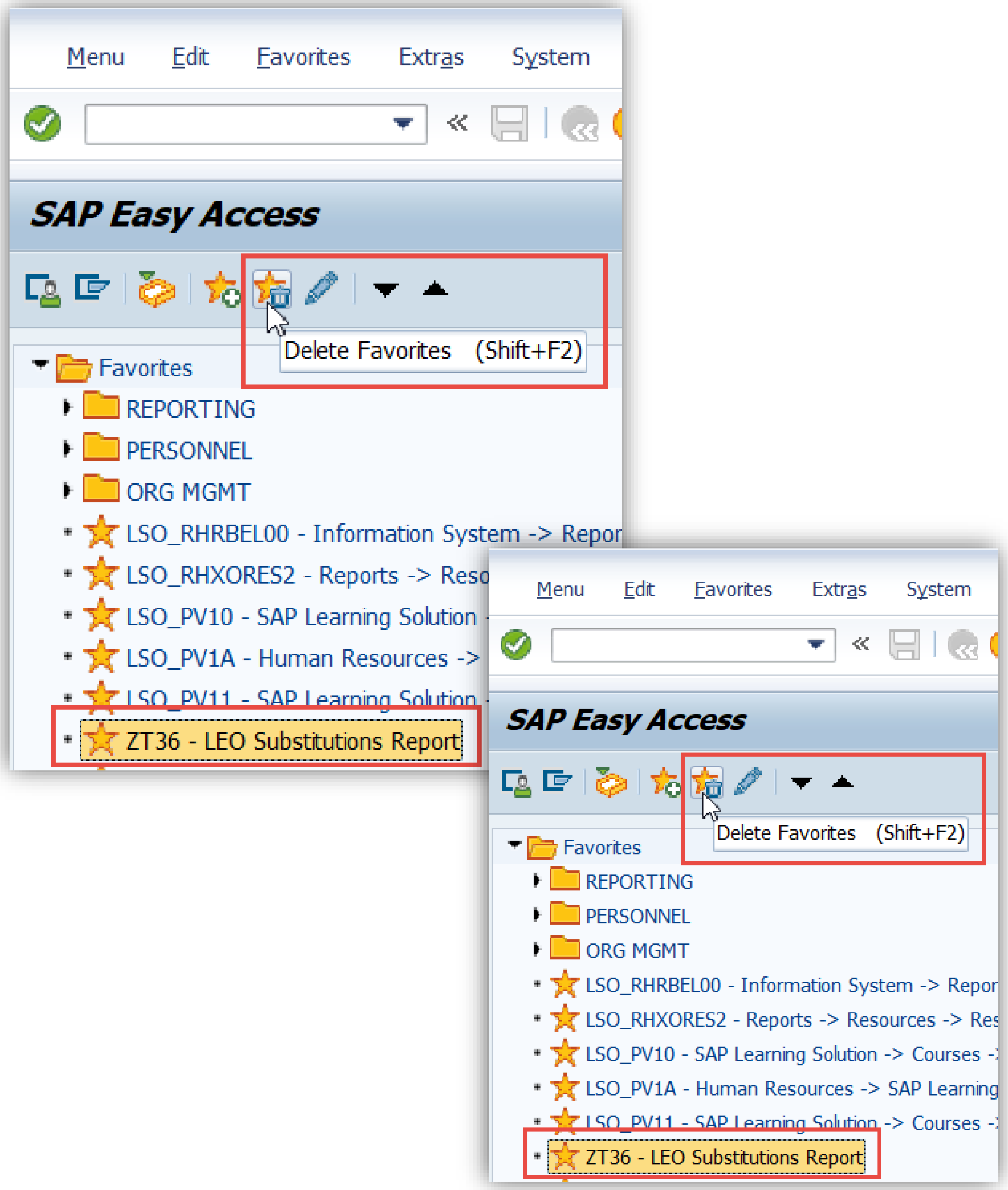
Delete Favorites

You can delete a favorite from your Favorites folder using the following steps:

1. Highlight the transaction to be deleted from your Favorites folder.
2. Click the **Delete Favorite** button in the application toolbar.

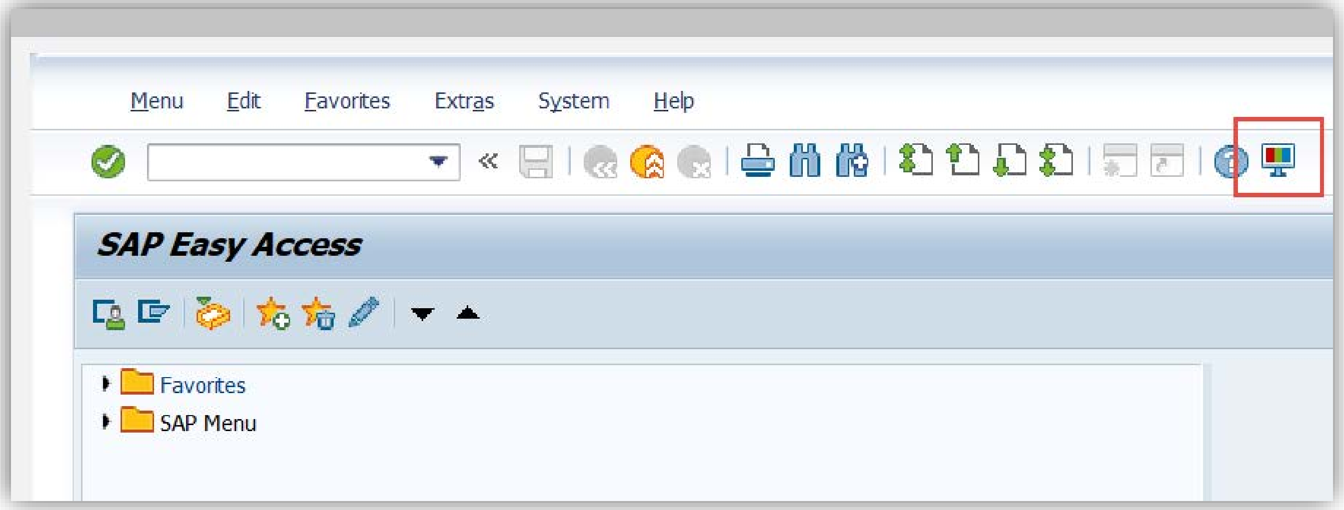
Or

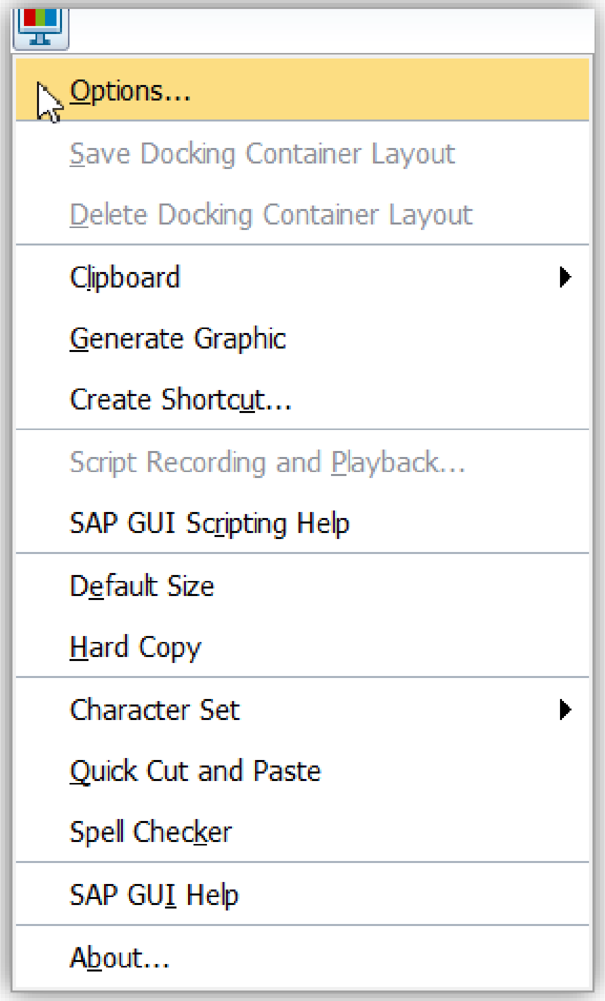
1. Follow the menu path ***Favorites > Delete*** to delete the highlighted favorite.



User Menu Customization

The User Menu can be customized with the **Customize Local Layout** button in the Standard Toolbar.



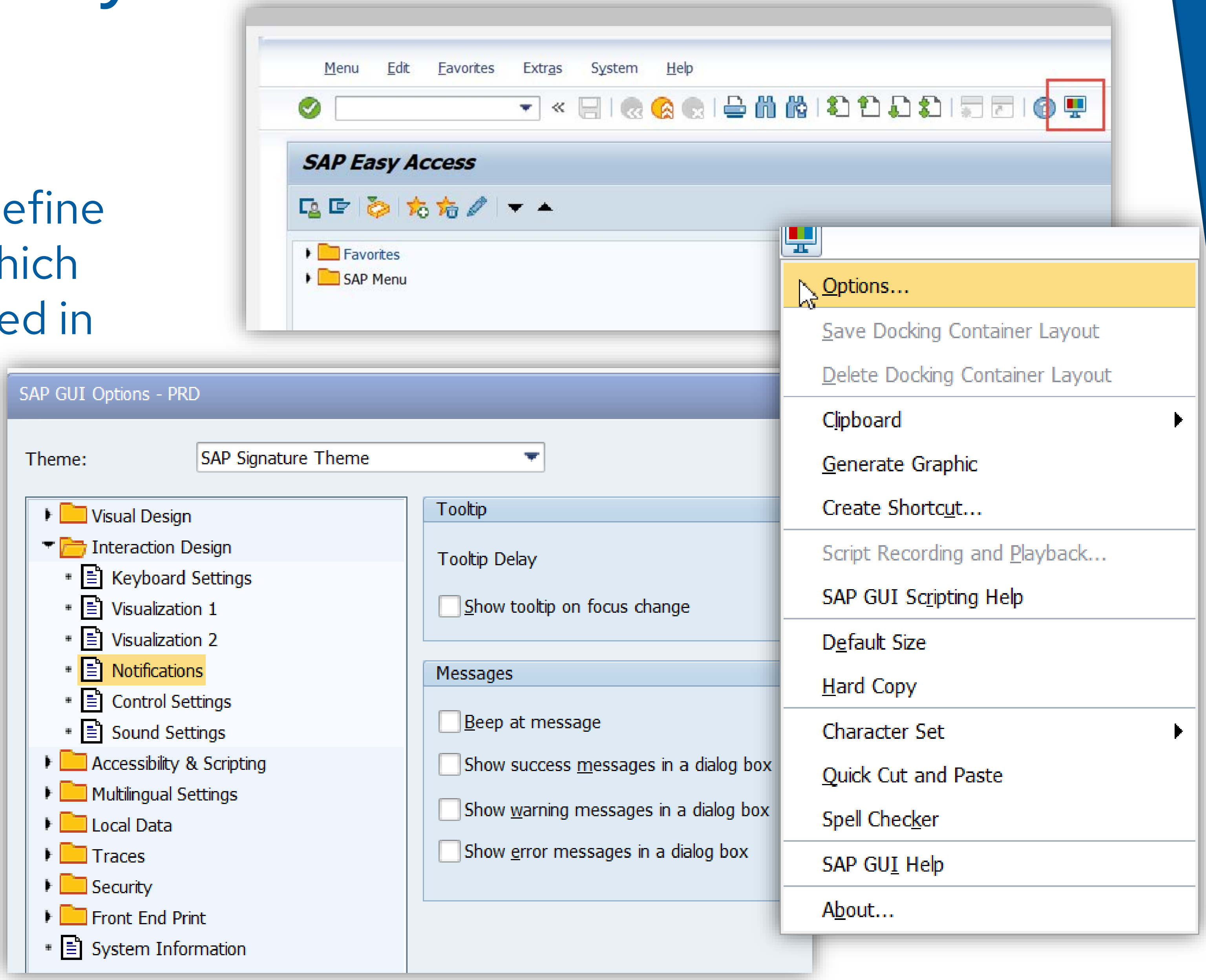


Customize Local Layout

The **Customize Local Layout** button is used to define many user Options such as which system messages are displayed in the status bar.

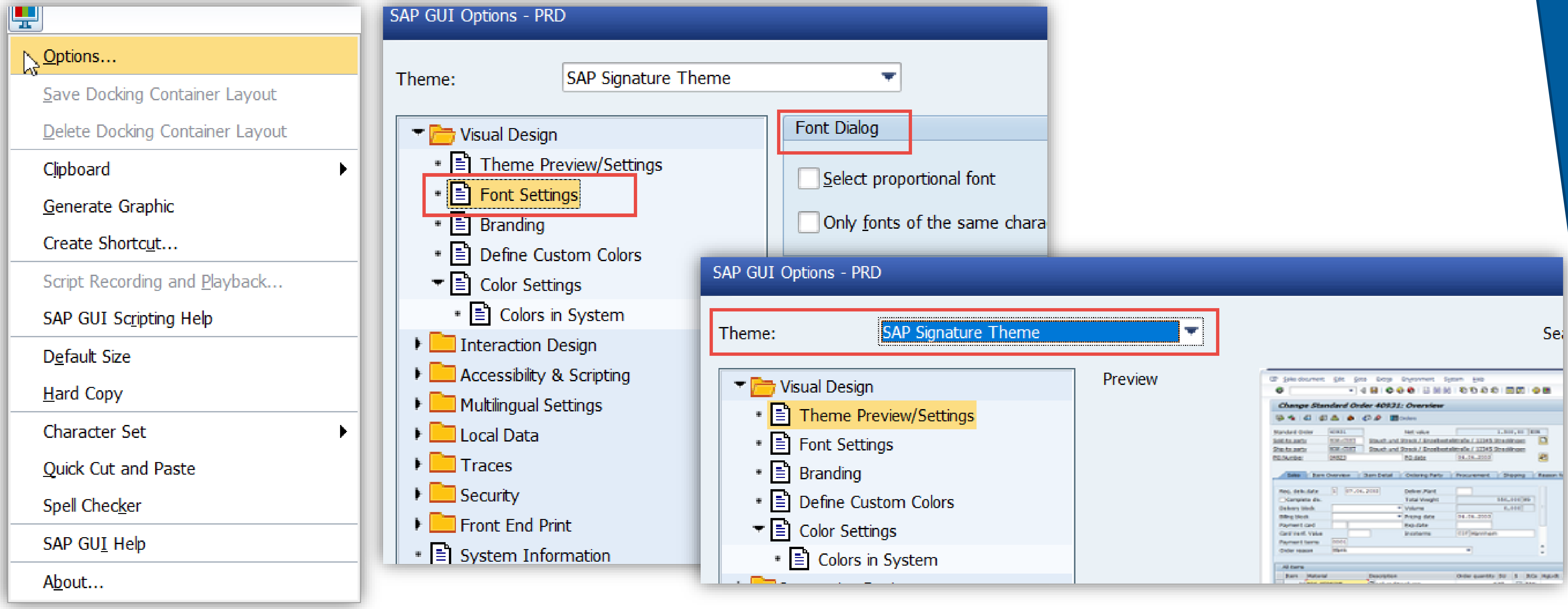
The **Options** selection allows the end-users to:

- Add or remove quick info message (tool tips).
- Change system messages.
- Turn the history on and off for fields.



Customize Local Layout

You can also use the **Customize Local Layout** button to customize the font size and color scheme by using the **Design Settings** selection.



Transactions

This lesson is designed to familiarize you with **transactions**. It will provide information so that you should be able to:

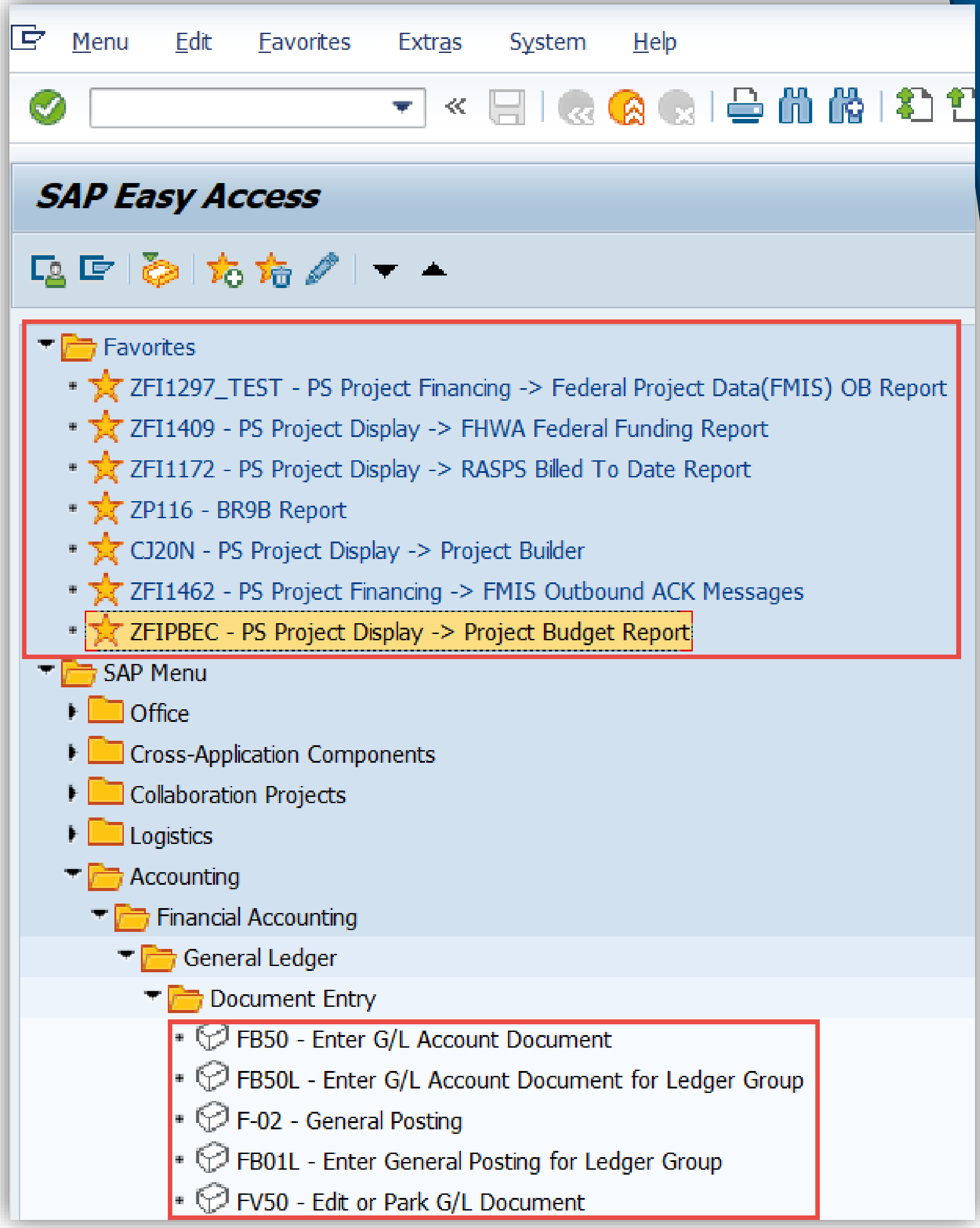
- Define key terms and concepts.
- Search the Menu Path to locate a transaction.
- Use the Command field.
- Launch a transaction.
- End a transaction.

Transactions Overview

Transactions are grouped by the specific ECC modules.

- Displayed in appropriate folders either in your SAP or User Menu.

**If you try to access a transaction that is not within your security role, you may receive an error message stating that you are not authorized.



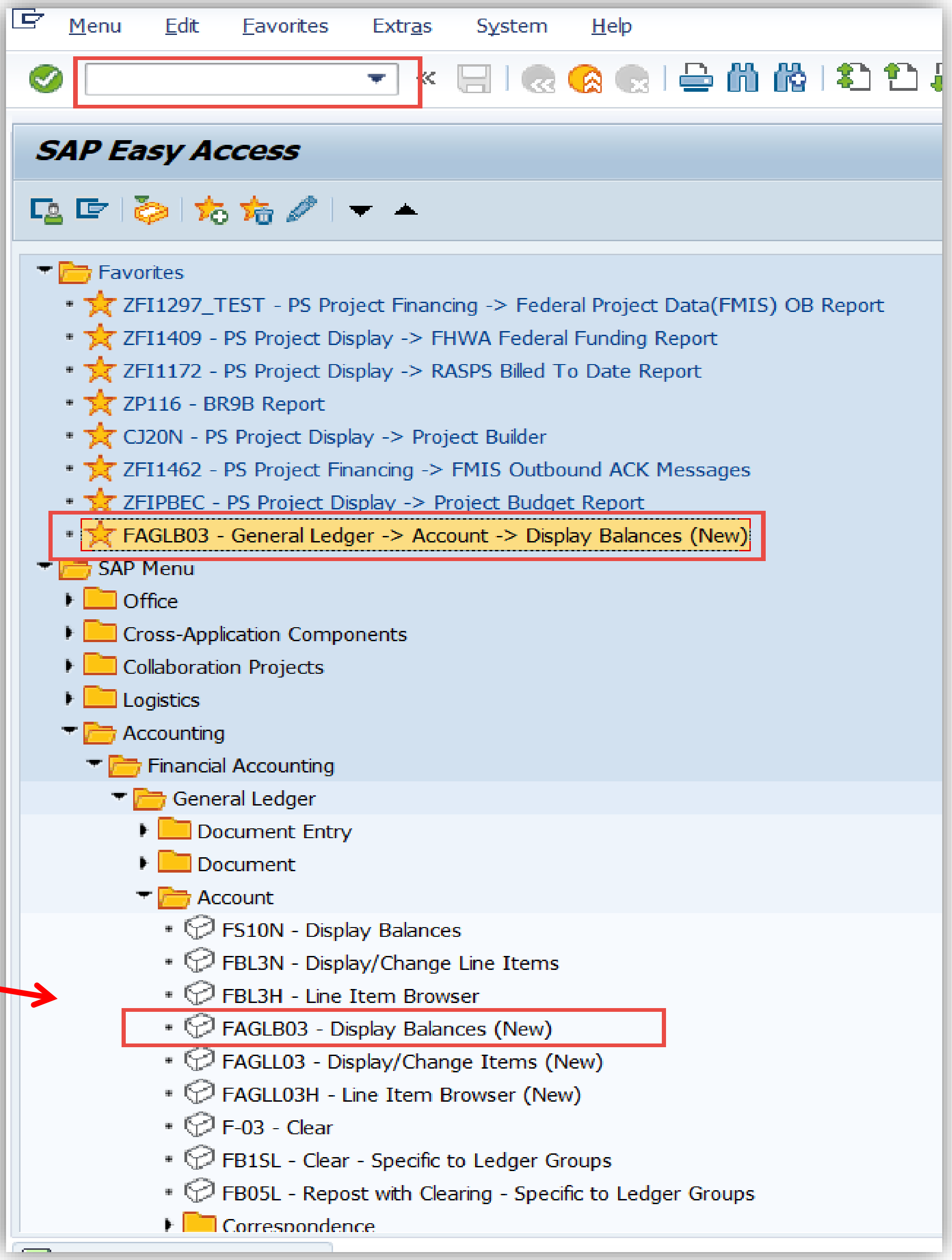
Executing Transactions

There are three primary ways to execute a transaction:

1. Type the transaction code directly into the Command field and click the **Enter** button.

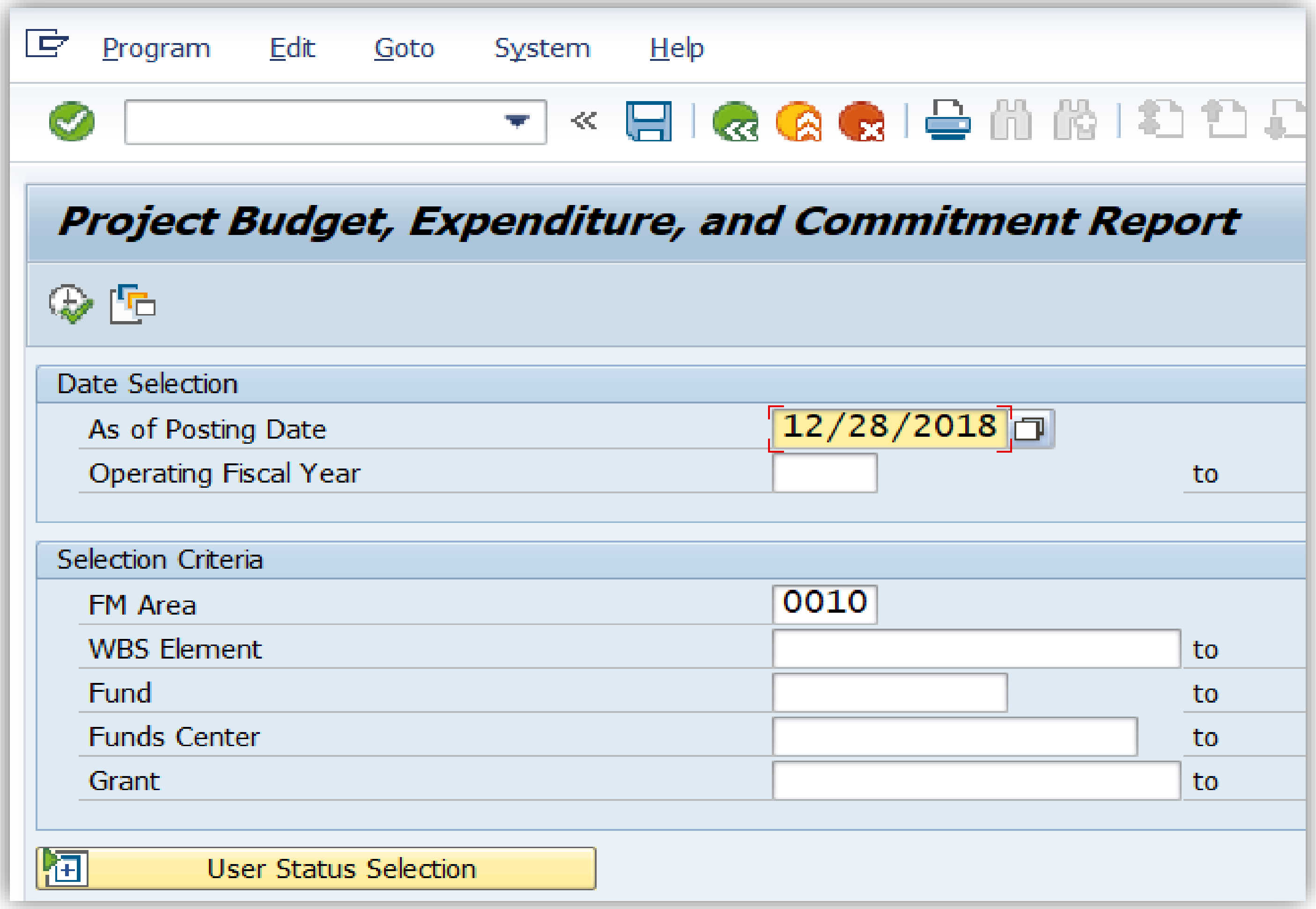
2. Double click on it from your Favorites folder.

3. Navigate to the transaction through the SAP Menu or User Menu path by clicking on the appropriate folders and double click on the transaction itself.



Executing Transactions

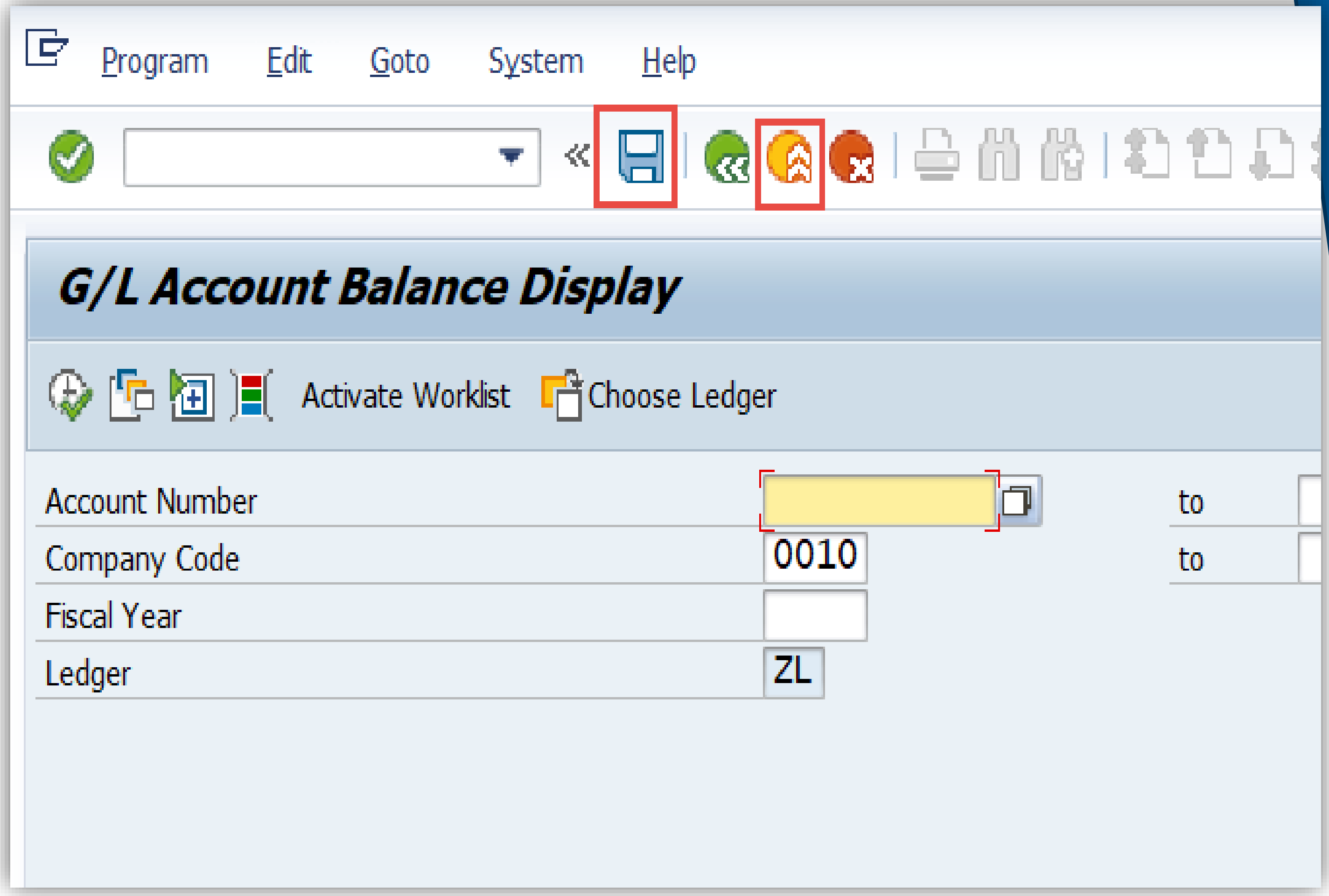
When using one of the three methods of accessing a transaction, the selected transaction screen will be displayed.



Ending a Transaction

Once you are done with a transaction:

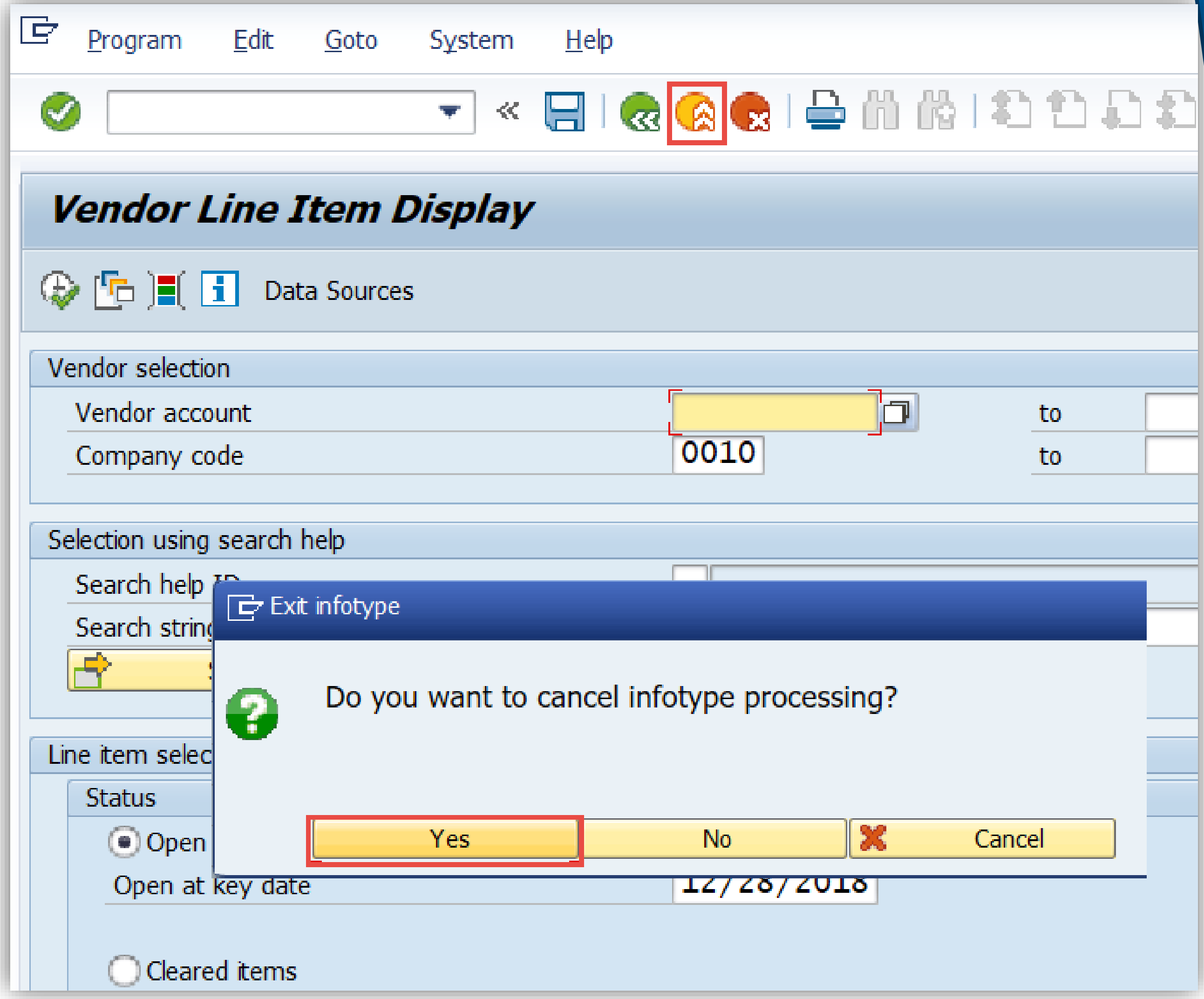
- You may need to click the **Save** button to submit your input for the transaction.
- Click the **Exit** button when finished.



Ending a Transaction

You may have to click the **Exit** button several times before you back out to the SAP Easy Access Menu.

- You can also type **/n** in the Command field and click the **Enter** button.



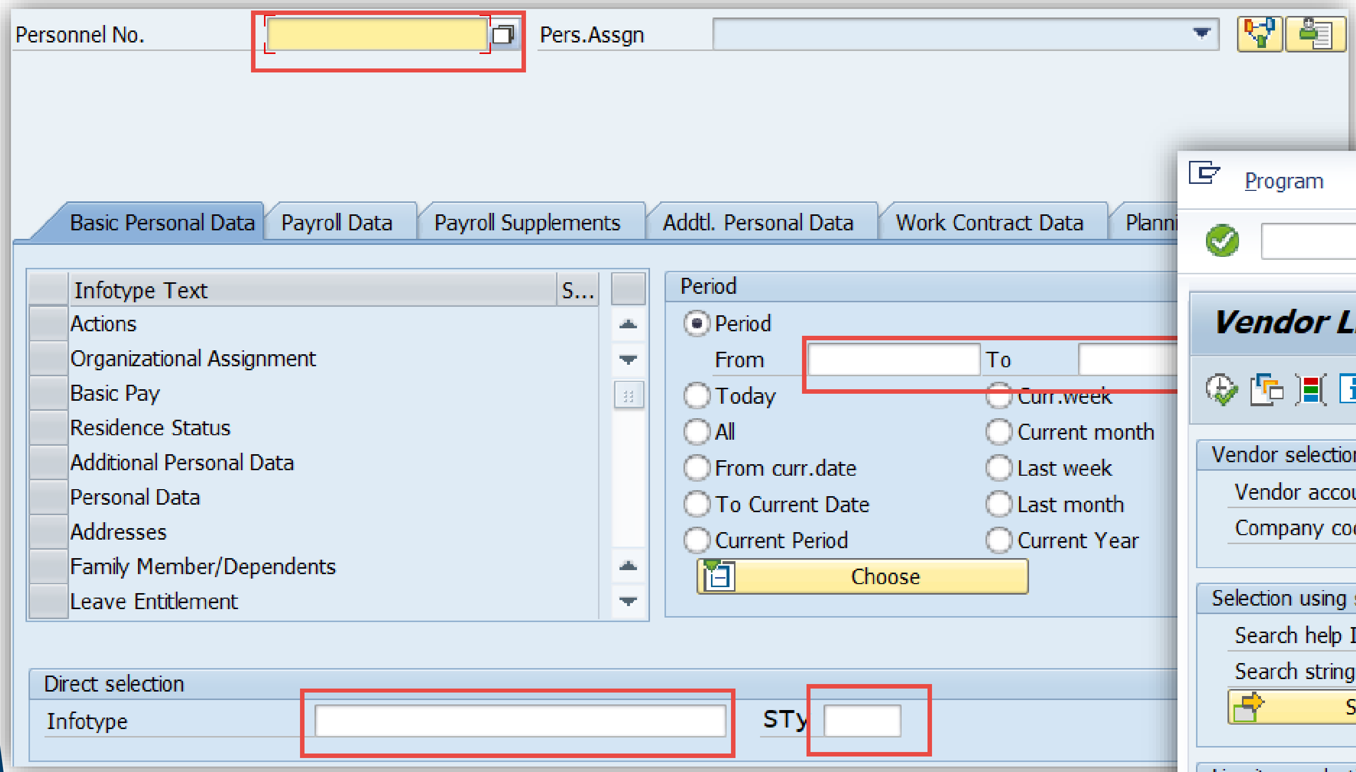
Navigating Transactions

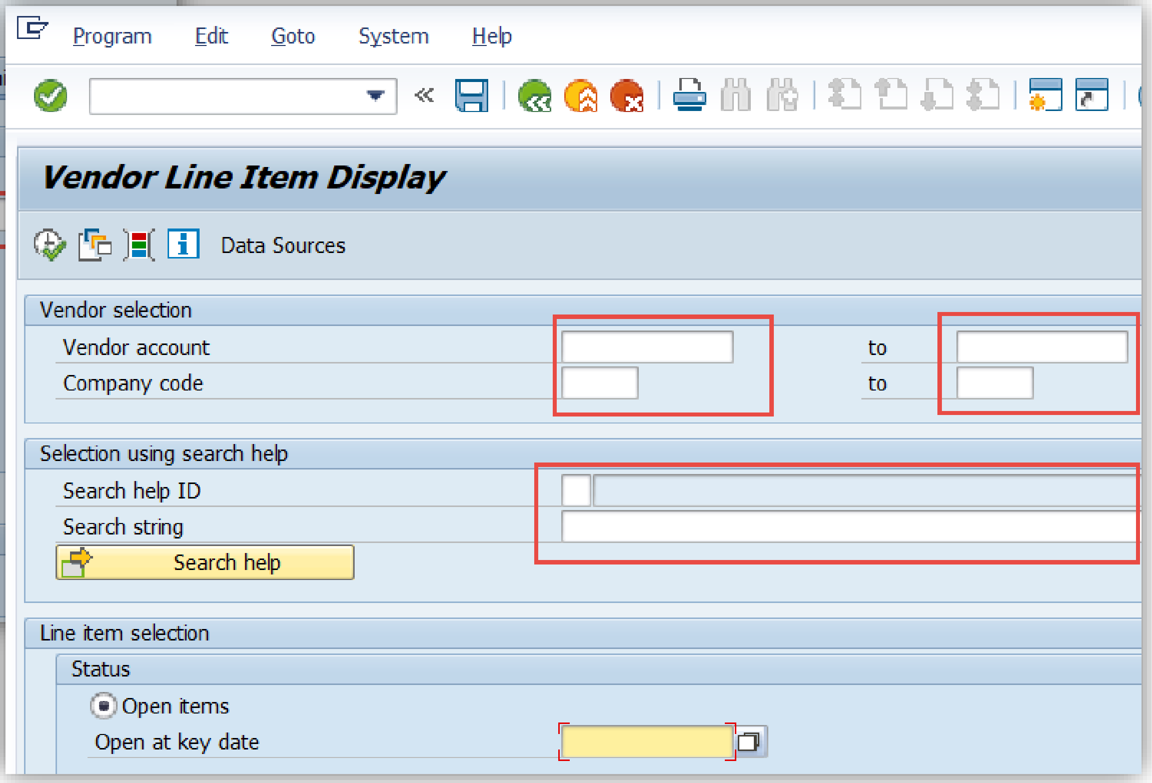
This lesson has been designed to familiarize you with **navigating transactions**. It will provide information so that you should be able to:

- Define key terms and concepts.
- Identify the six types of fields and how they are used in the LaGov ERP system.
- Enter Data.
- Execute data searching within a field.
- Describe the system alert messages.
- Identify transaction sections.
- Utilize tabs and scrolling.

Navigating Transactions Overview

A **Field** is a defined area of the ECC screen where you can enter or review a specific piece of information.





Field Types

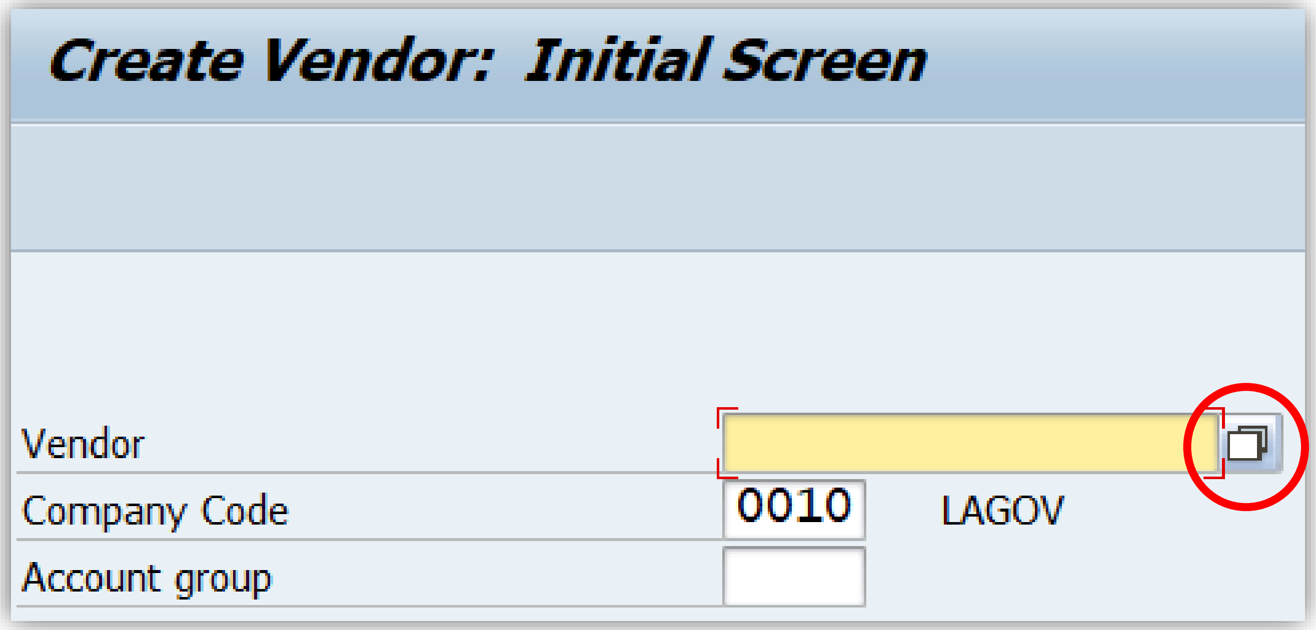
Field Type	Description and How to Respond
Required	Information must be entered into required fields to complete the transaction. Required fields will appear with a check box when the screen appears. Enter the necessary information in all required fields in order to proceed with a transaction.
Default 0010 State of Louisiana	Default fields are automatically populated with data. These fields can be changed as long as the field is not gray. Check these fields to verify that data is correct.
Optional	Entering data in optional fields is not necessary, but can be used for additional criteria. No action required. Any entries made here will not affect the progress of the transaction.
Conditional Vendors (General)	Conditional fields will only appear when a prior condition or action has occurred in the transaction; this field type may not always appear on a particular screen or may be grayed until available. Enter the appropriate data when this field appears.
Informational Active	This field is pre-populated with data that cannot be altered manually by the user; it is simply there for informational purposes. Cannot change information in informational fields because they are grayed out.
Drop-down Organizational unit	Drop-down fields contain a list of value options. You can select only one of the pre-populated values for the field. Select one of the values from the drop-down list.

Matchcodes

For entry fields, you can fill in an appropriate value but sometimes you may not be sure which entry is correct:

The ECC provides a search function called a **Matchcode**

that allows you to search for an appropriate value for many of the fields.

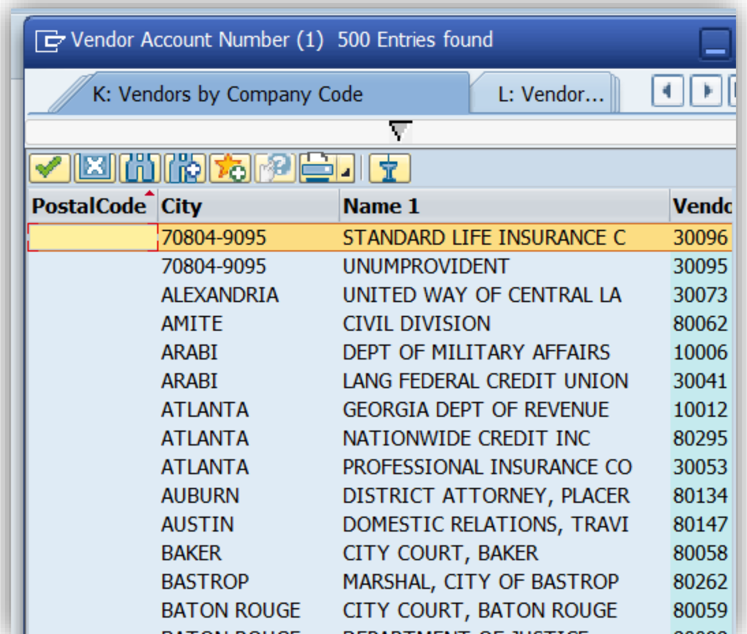


Matchcodes (cont'd)

You can choose a value from the **Matchcode** by:

- Selecting the value from a list.
- Entering search criteria for a value by category if there are many possibilities.
- Select a number range or date option.

The ECC displays a list of all matching records it retrieves based on the criteria entered.



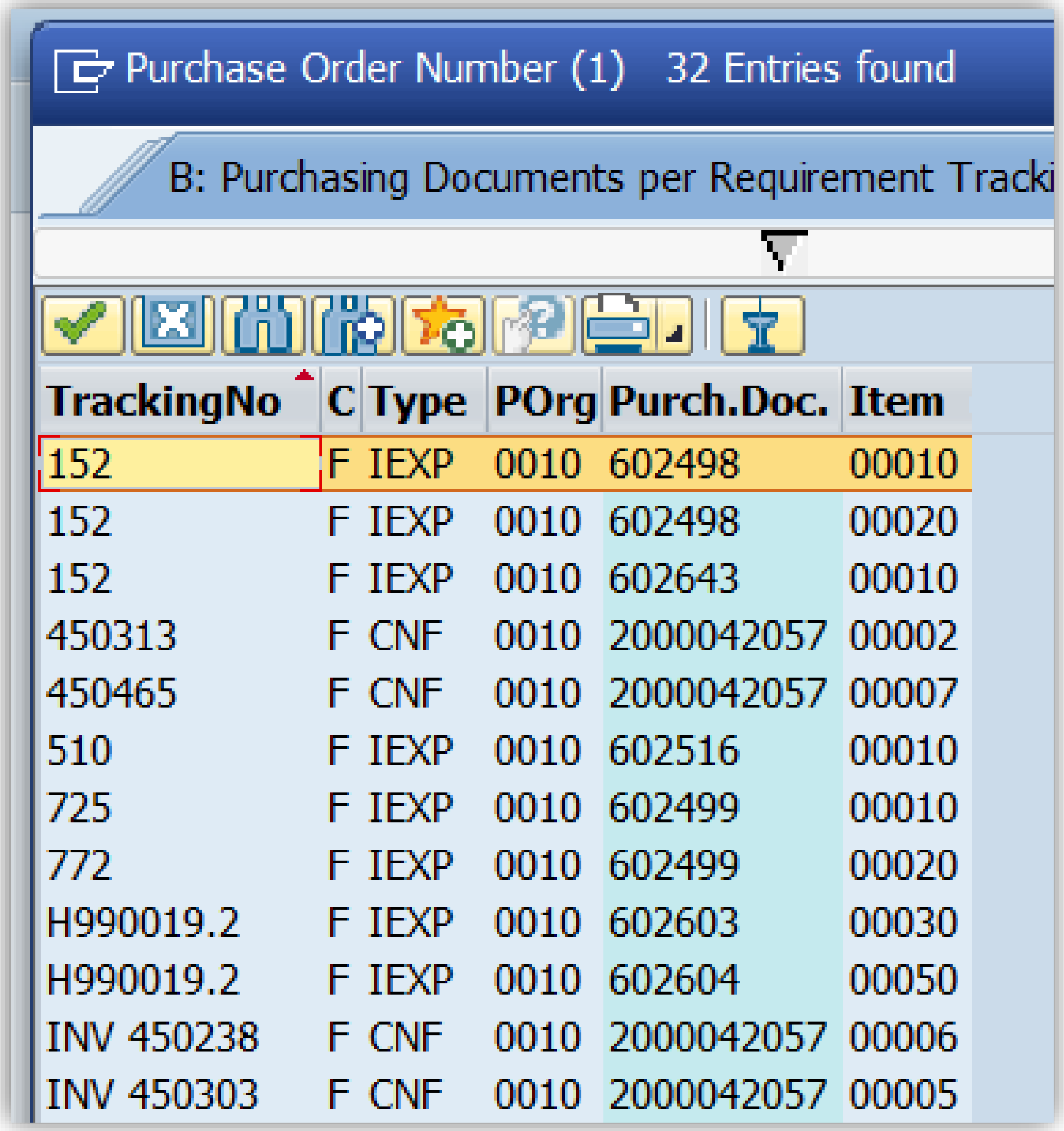
PostalCode	City	Name 1	Vendo
	70804-9095	STANDARD LIFE INSURANCE C	30096
	70804-9095	UNUMPROVIDENT	30095
	ALEXANDRIA	UNITED WAY OF CENTRAL LA	30073
	AMITE	CIVIL DIVISION	80062
	ARABI	DEPT OF MILITARY AFFAIRS	10006
	ARABI	LANG FEDERAL CREDIT UNION	30041
	ATLANTA	GEORGIA DEPT OF REVENUE	10012
	ATLANTA	NATIONWIDE CREDIT INC	80295
	ATLANTA	PROFESSIONAL INSURANCE CO	30053
	AUBURN	DISTRICT ATTORNEY, PLACER	80134
	AUSTIN	DOMESTIC RELATIONS, TRAVI	80147
	BAKER	CITY COURT, BAKER	80058
	BASTROP	MARSHAL, CITY OF BASTROP	80262
	BATON ROUGE	CITY COURT, BATON ROUGE	80059

Types of Matchcodes

Matchcodes fall into three basic categories:

1) Short list or hit list

The values are listed on one screen. For longer lists, you may need to scroll down to see all the values.



Purchase Order Number (1) 32 Entries found

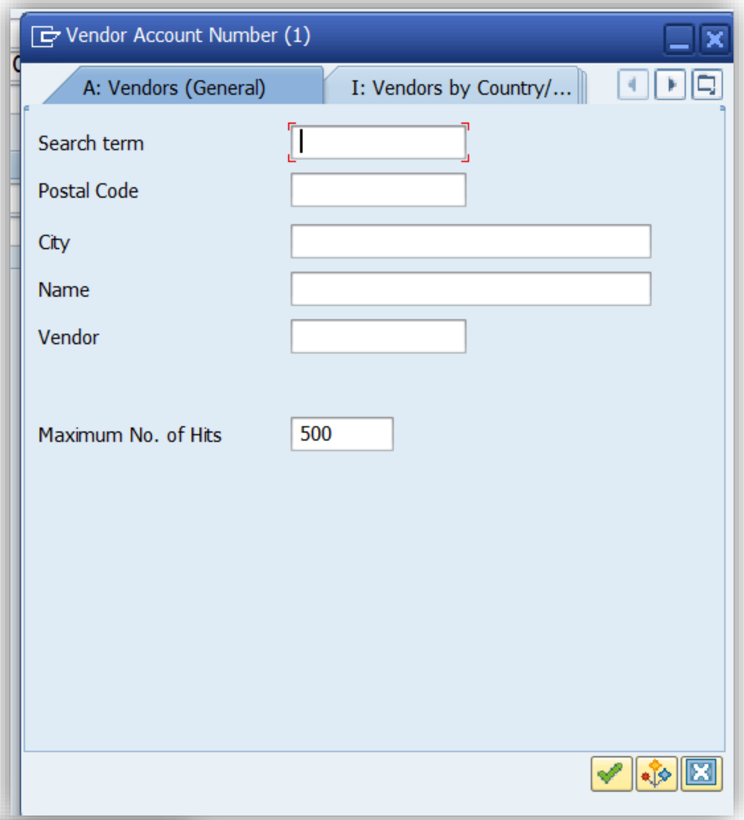
B: Purchasing Documents per Requirement Tracki

TrackingNo	C	Type	POrg	Purch.Doc.	Item
152	F	IEXP	0010	602498	00010
152	F	IEXP	0010	602498	00020
152	F	IEXP	0010	602643	00010
450313	F	CNF	0010	2000042057	00002
450465	F	CNF	0010	2000042057	00007
510	F	IEXP	0010	602516	00010
725	F	IEXP	0010	602499	00010
772	F	IEXP	0010	602499	00020
H990019.2	F	IEXP	0010	602603	00030
H990019.2	F	IEXP	0010	602604	00050
INV 450238	F	CNF	0010	2000042057	00006
INV 450303	F	CNF	0010	2000042057	00005

Types of Matchcodes (cont'd)

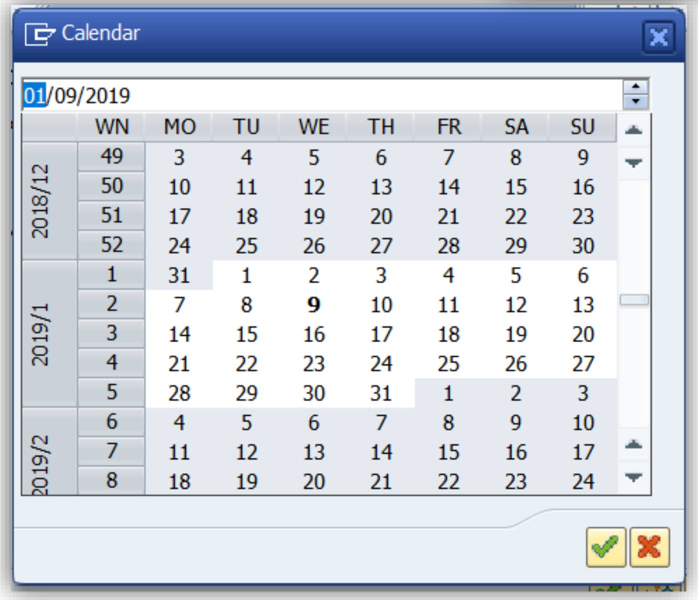
2) *Restrict Value Range*

Many entries are available for the field. A number of tabbed screens with different categories display so that you can enter your search criteria.



3) *Calendar search*

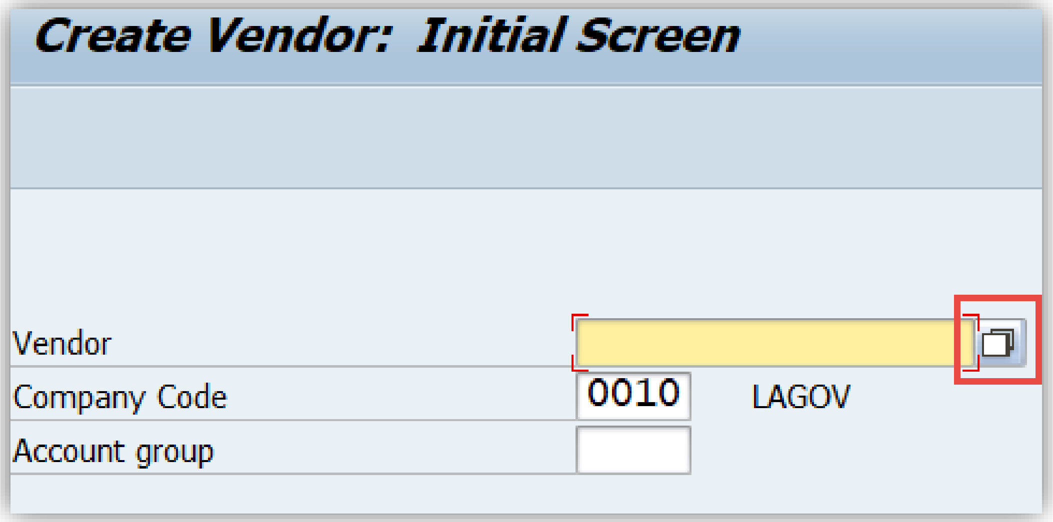
A calendar-type dialog box is displayed so that you can select day, month, and year for fields such as invoice posting date.

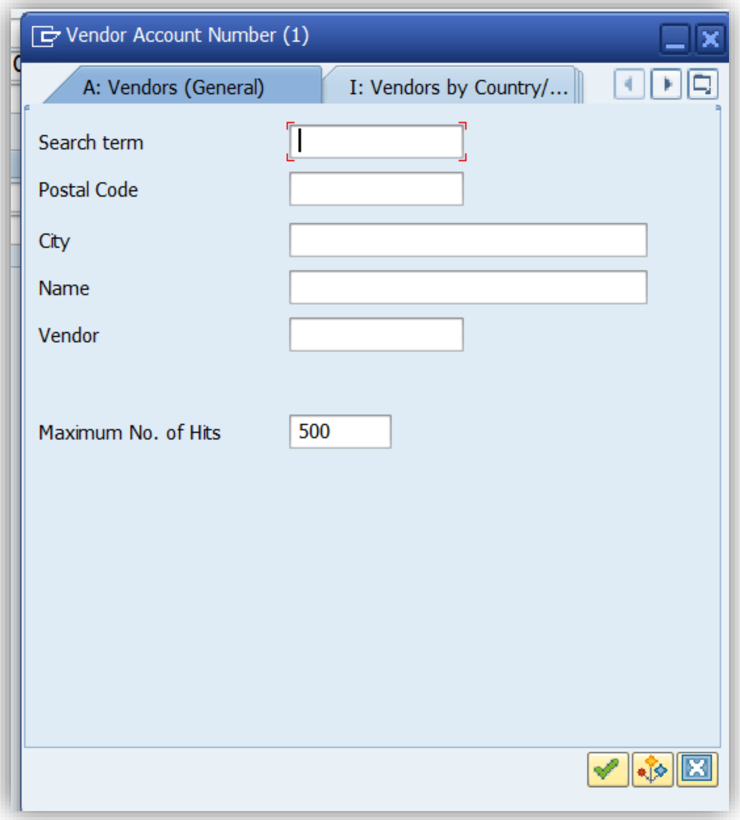


Using Matchcodes

To use the **Matchcode** button to search for values, do the following:

1. Click in the field you wish to search for values.
2. Click on the **Matchcode** button to open the search window.
3. When the search window appears, enter your search criteria or scroll to find the appropriate value in the list.
4. Click the **Start Search** button to execute search.

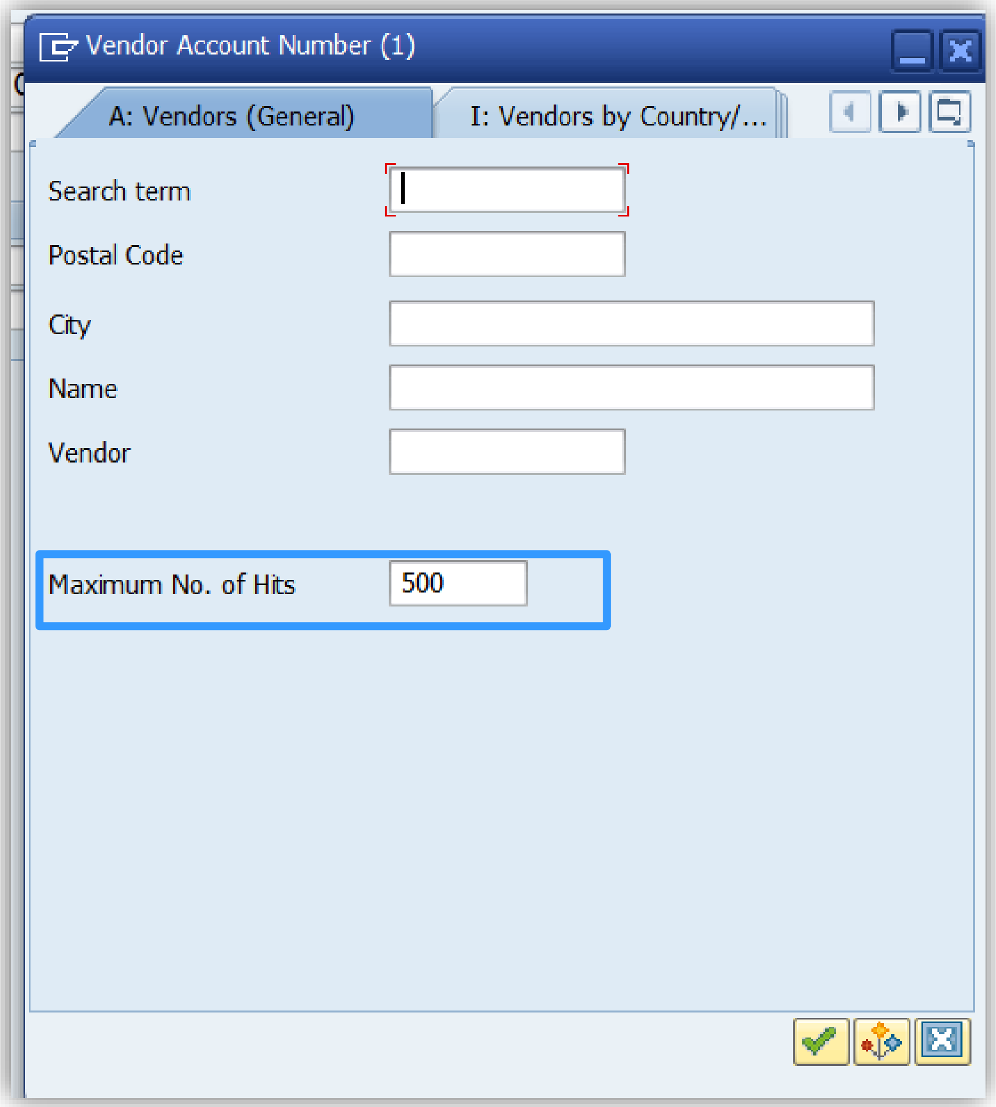




Maximum Restriction

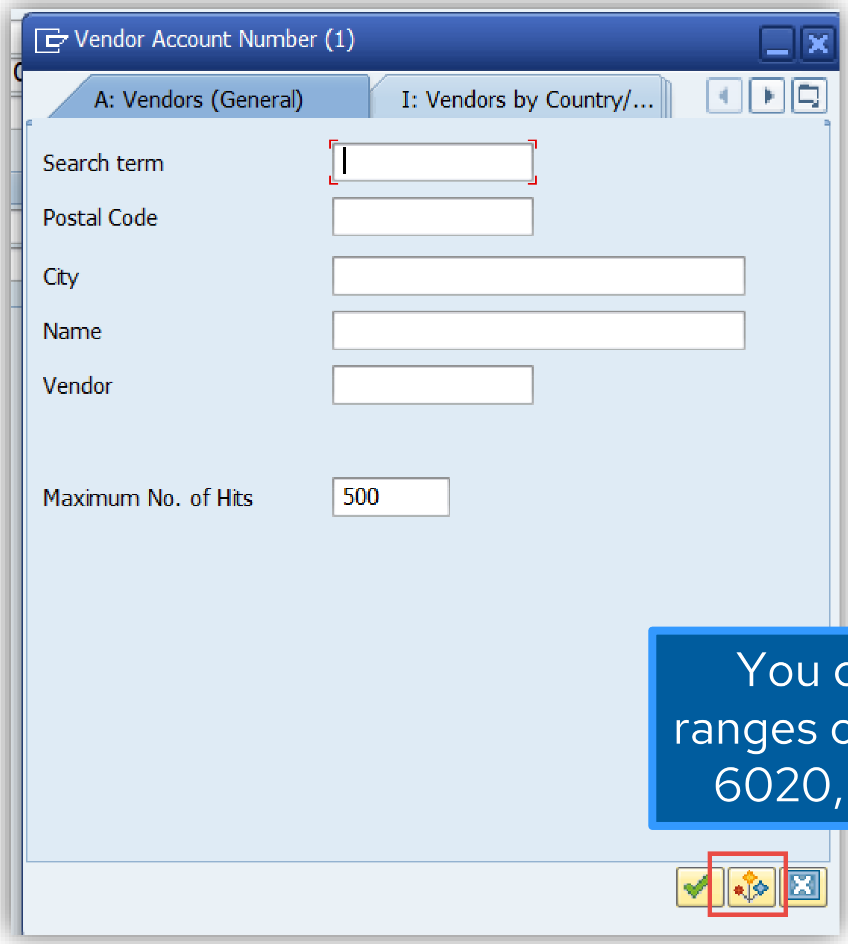
There may be a large number of values for a particular matchcode selection:

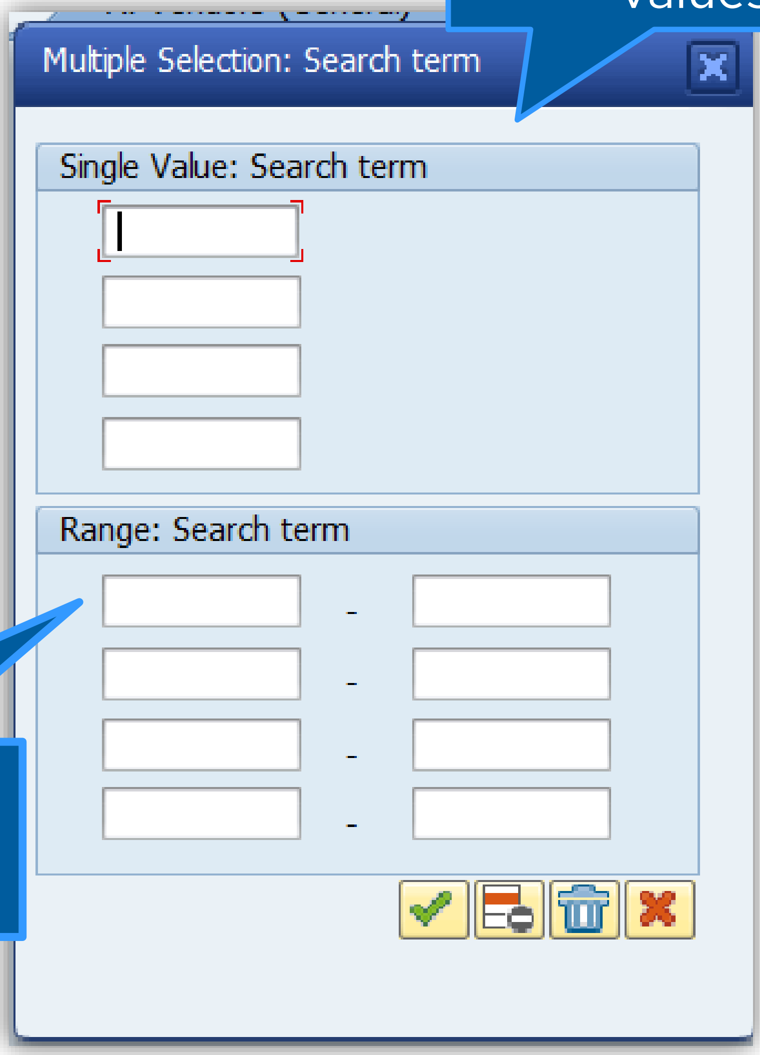
- There is no limit to the maximum number of values the system is able to display.
- The system **will default the maximum number of values (hits) displayed at 500.**
- You can edit or remove the max by changing/deleting the numbers in the box.



Multiple Selection Button

You can select multiple values or restrict ranges using the **Multiple Selection** button.





You can enter several single values

You can enter several ranges of values, e.g. 5001-6020, 6035-6040, etc.

Wildcards

Using a **Wildcard** means inserting a symbol in a search string to facilitate narrowing the results when:

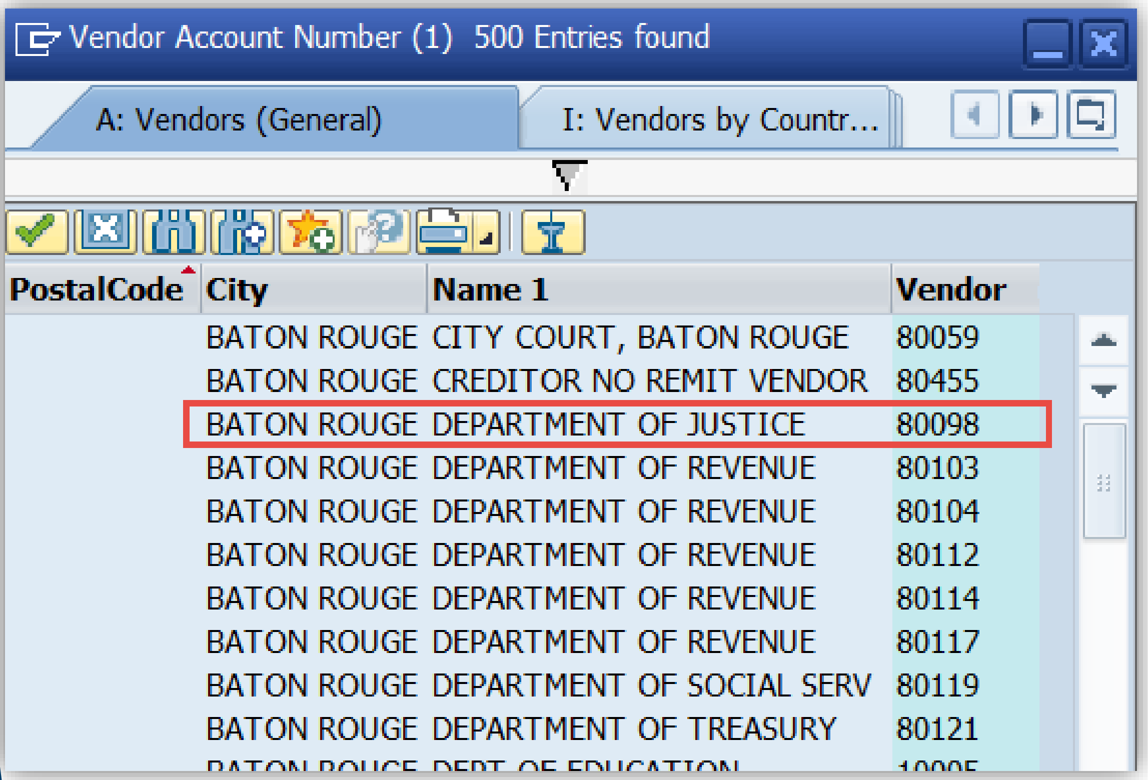
- You are not sure about the full name of a specific value.
- You need to find all values that contain a common string of characters.

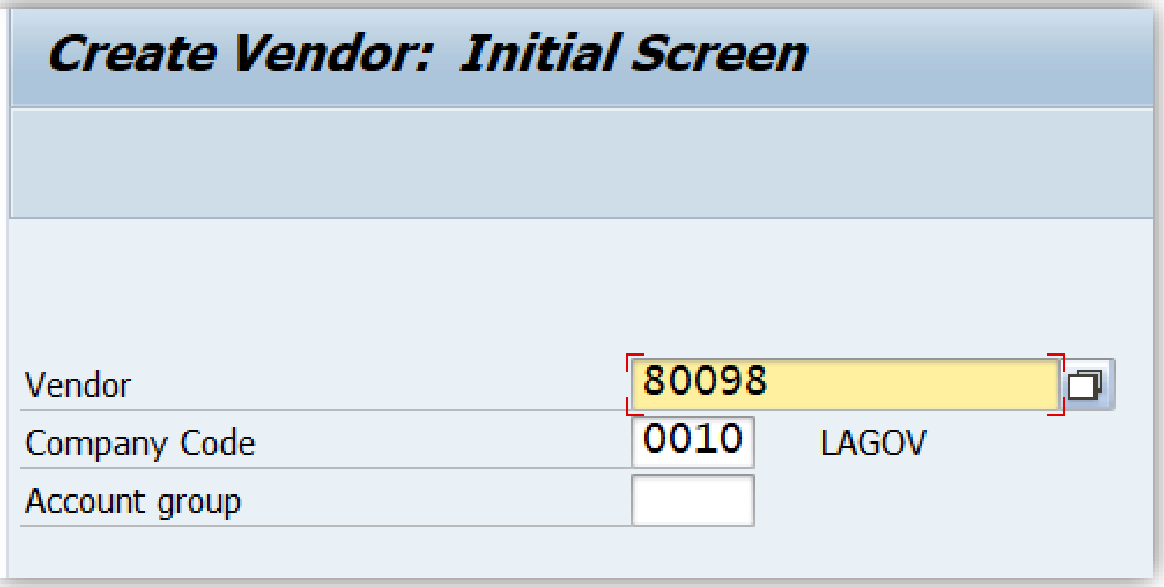
You can replace characters with the following symbols:

Wildcard	Meaning	Example	Search Result
Asterisk (*)	Replaces zero or more characters	`*`	All parameters in the list
		`Value*`	***Values, Value 1, value***
		`*value*`	***Initial value, AllValues***
		`Va*e`	***Value, vague, vane, variable***

Matchcode Search Results

Once the **matchcode** search results appear, double click the entry you wish to select and it populates the field for you.



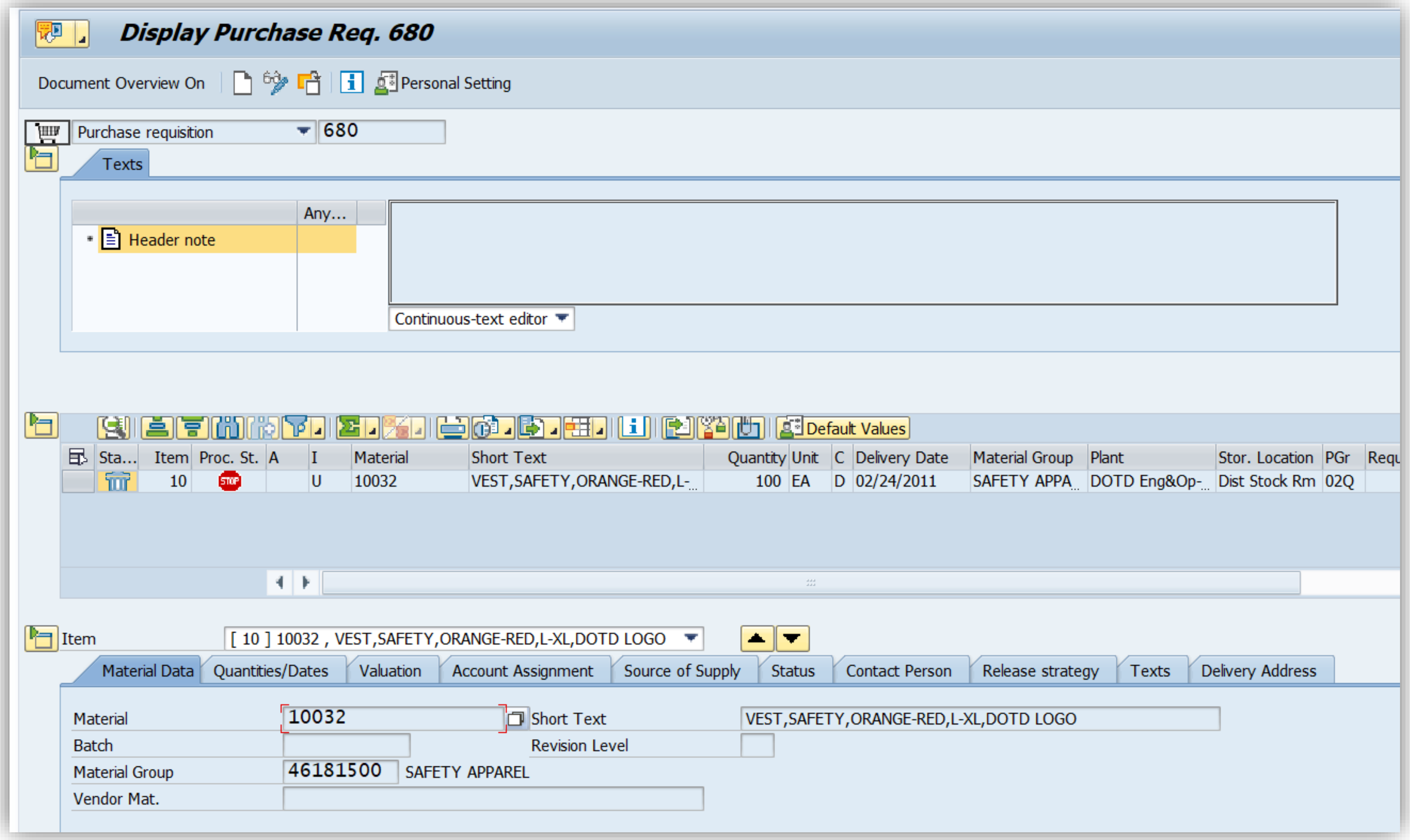


System Alert Messages

If an entry in a field is not valid, a **system message** will be displayed in the Status Bar. The types of system messages are shown below:

Alert Type	Description	How to Respond
Error	Error messages indicate invalid or incomplete information has been entered in a field.	The error must be corrected to continue.
Warning	Warning alerts indicate that you should check a field entry carefully before proceeding in the transaction.	Review your field entry and if satisfactory, click the Enter button to bypass the warning.
Information	Information alerts give information such as document number or verification that a transaction is complete.	No response is necessary.

Sections of the Transaction Screen



} Header

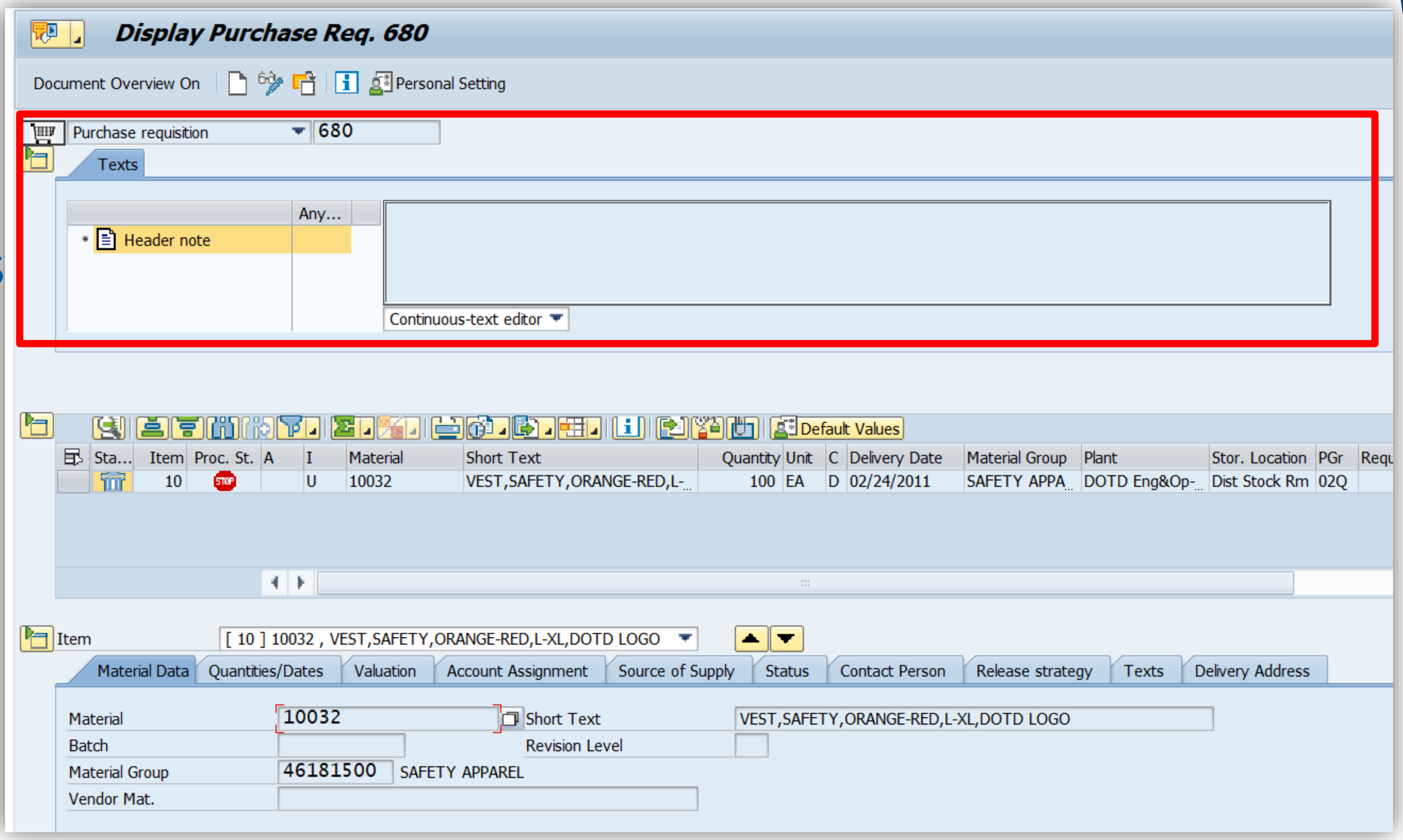
} Item Overview

} Item Detail

Header Section

The **Header** contains data that relates to the entire document such as information about:

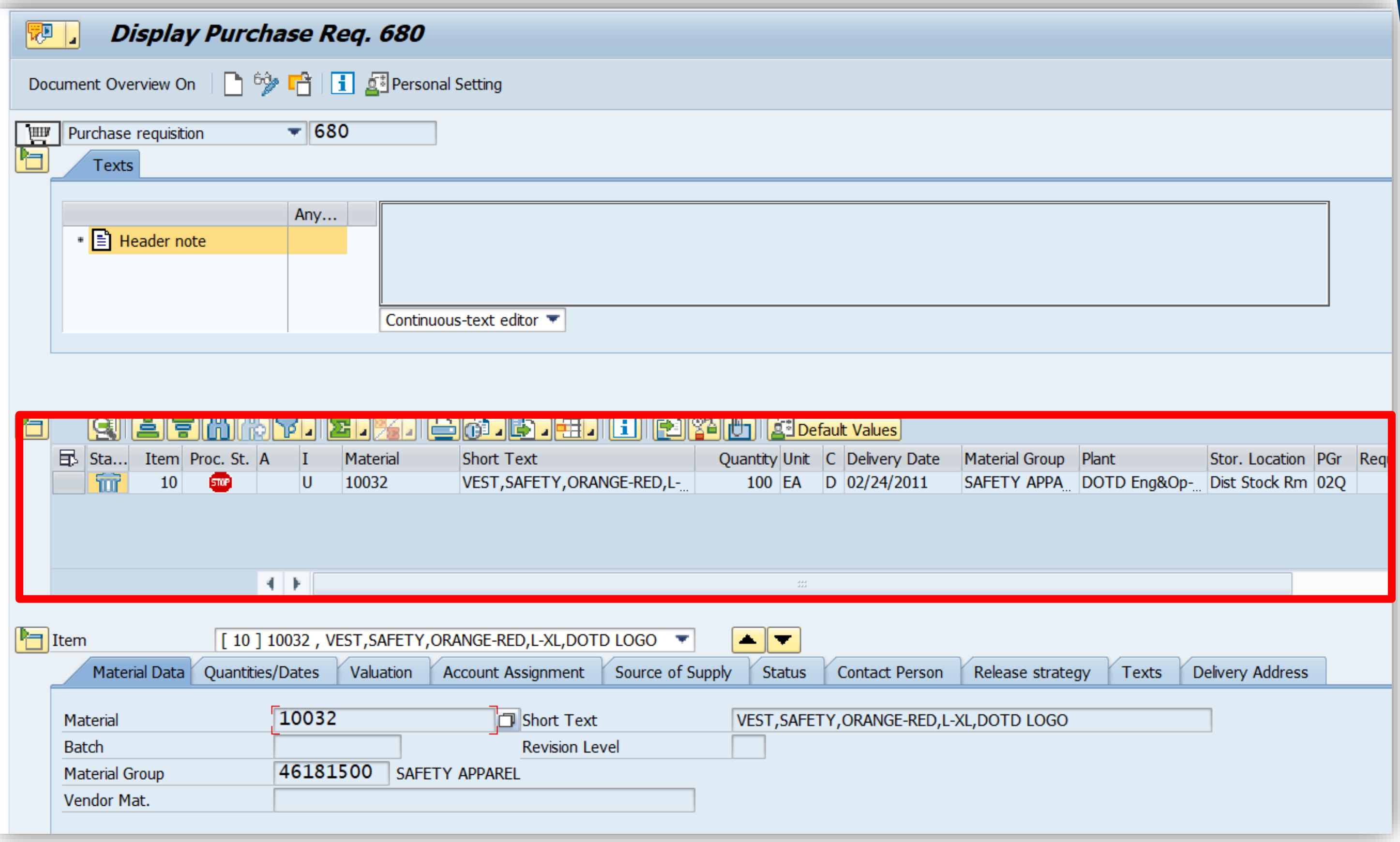
- vendor information
- description text
- document numbers



Item Overview Section

The **Item Overview** is a summary of items attached in a document such as:

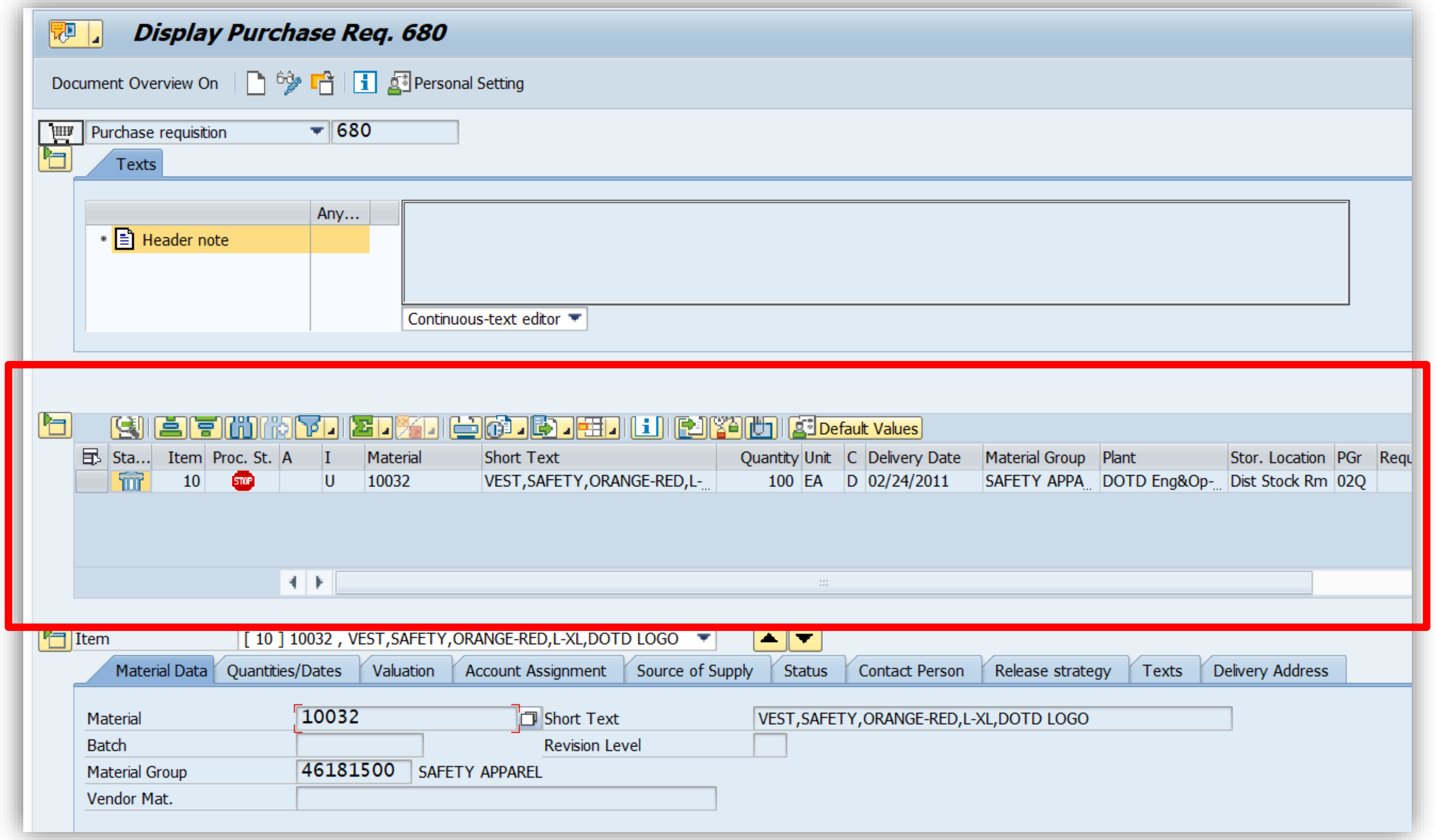
- a list of all the items a vendor has ordered
- receiving agency
- requisitioner or requester's name



Item Details Section

The **Item Details** contains information specific to a line item such as:

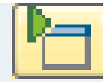
- material specs
- quantity
- dates
- weight



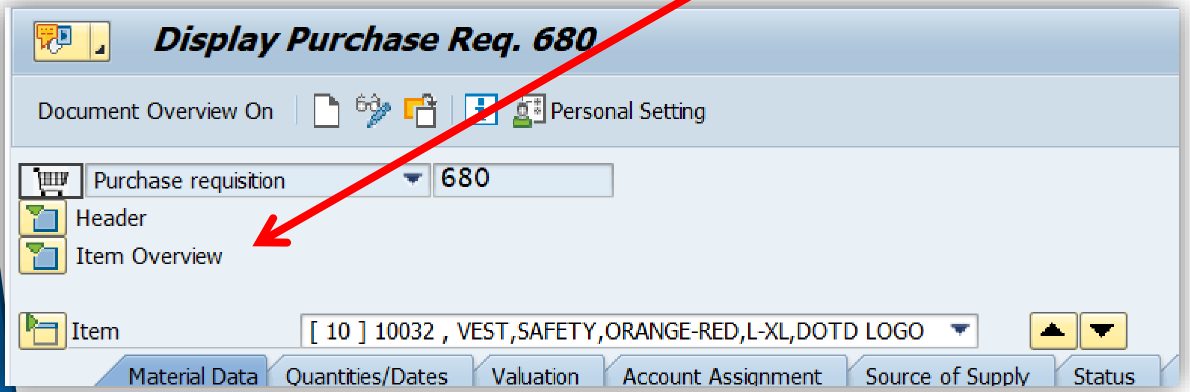
Expanding and Collapsing Sections

The transaction sections can be collapsed as needed:

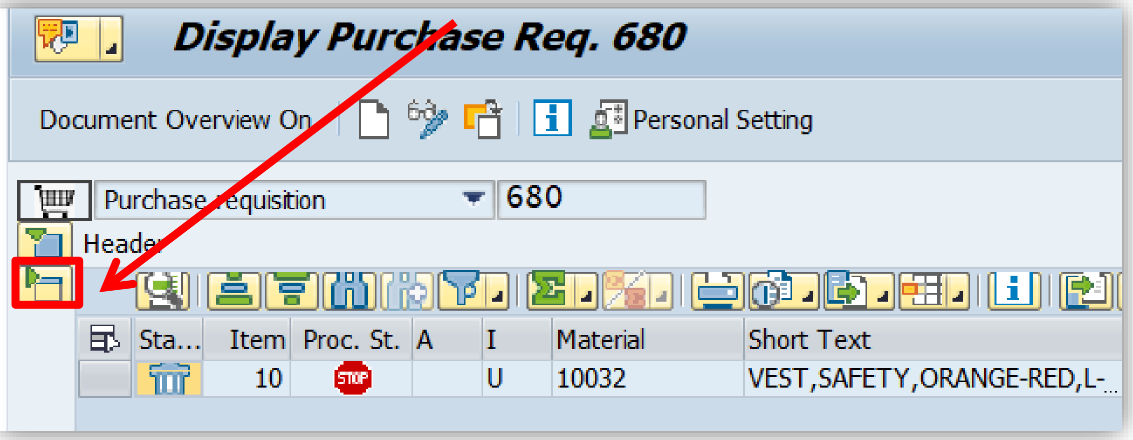
 Expands a section

 Collapses a section

Item Overview Collapsed



Item Overview Expanded

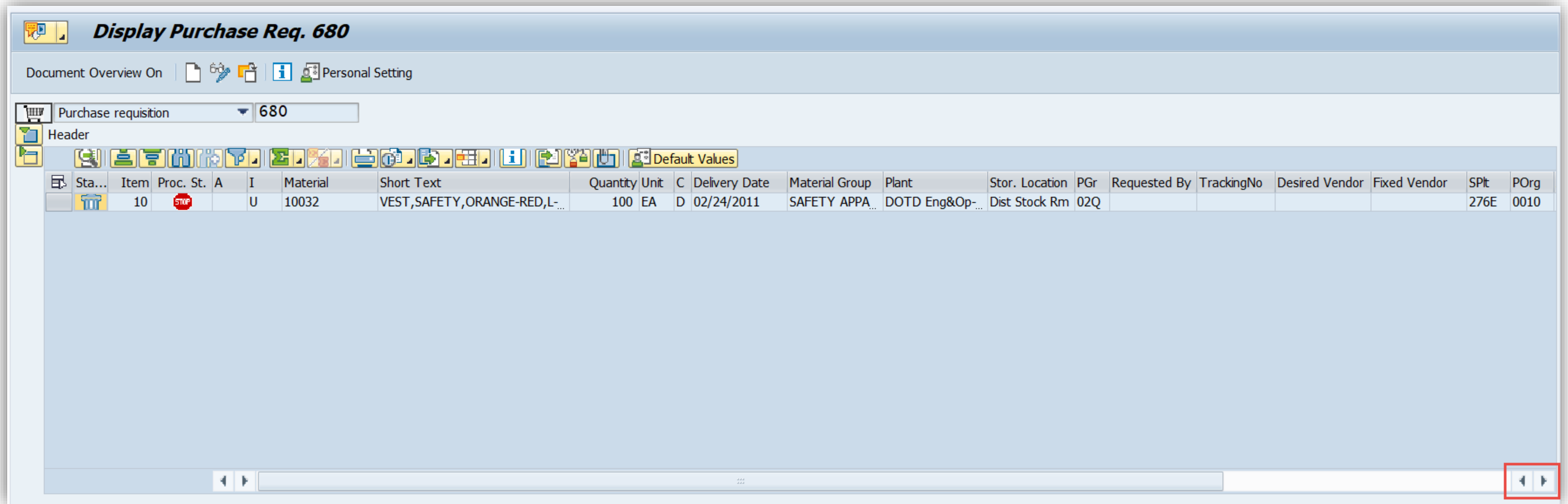


Scrolling

Expanding the sections can lengthen the page and all the information may not be visible.

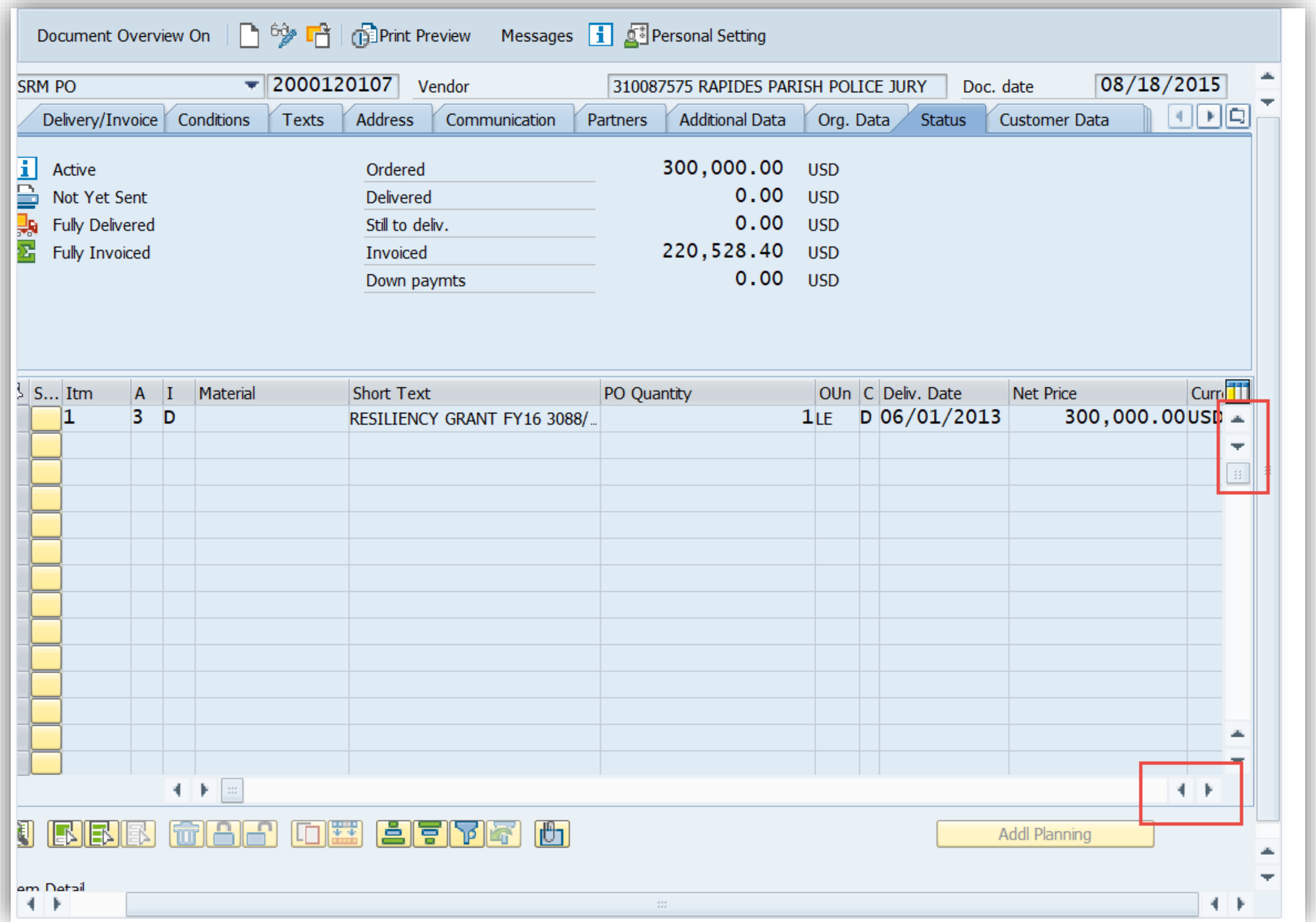
- To view the information you may need to scroll down or to the right.

*Click the highlighted **Scrollbar** button to view the additional Item information on the page*



Scrolling

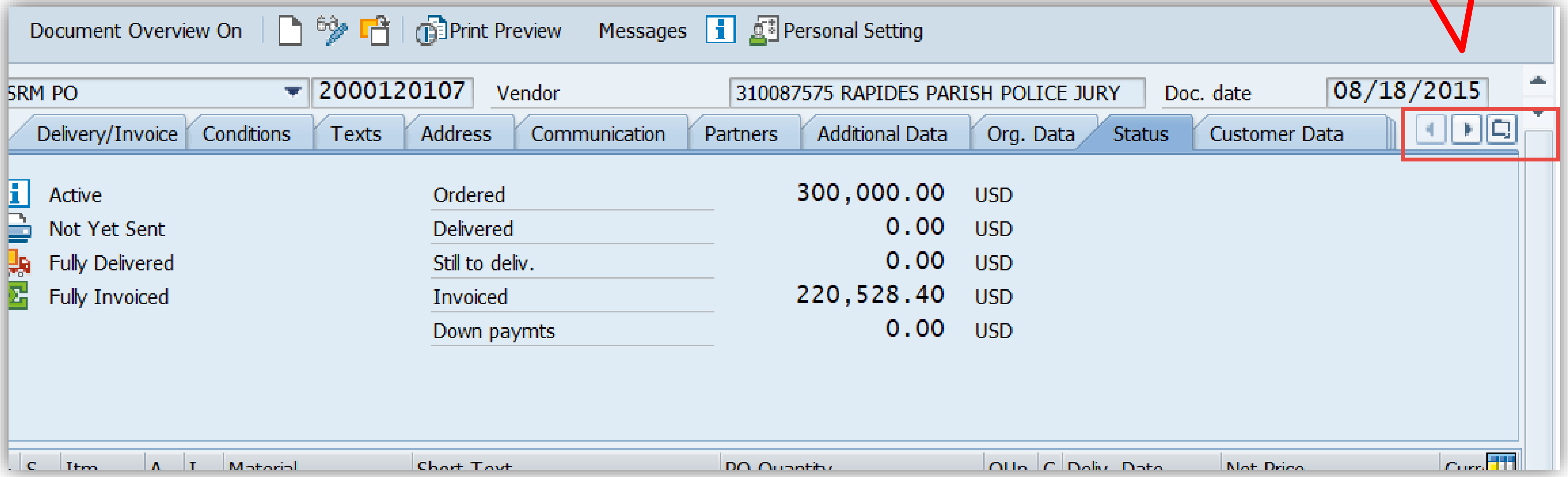
To see all of the information or tabs you may need to scroll right in order to scroll down.



Scrolling

To see all of the information or tabs you may need to scroll right in order to scroll down.

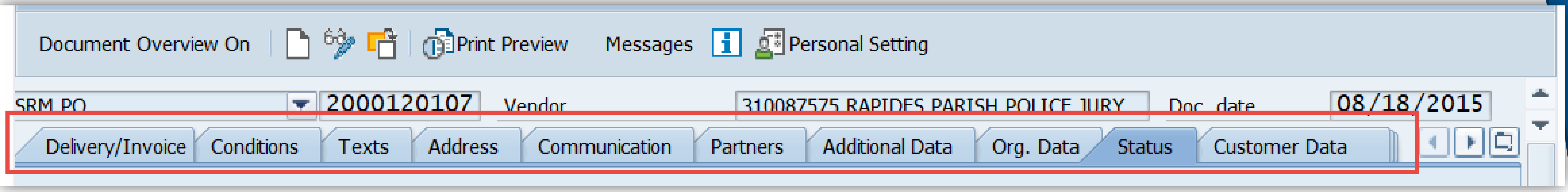
Now the tab buttons are visible.



Tabs

Within a section, information may be held in tabs.

- Tabs are used to show / hide information.
- Multiple tabs may be available on one screen.

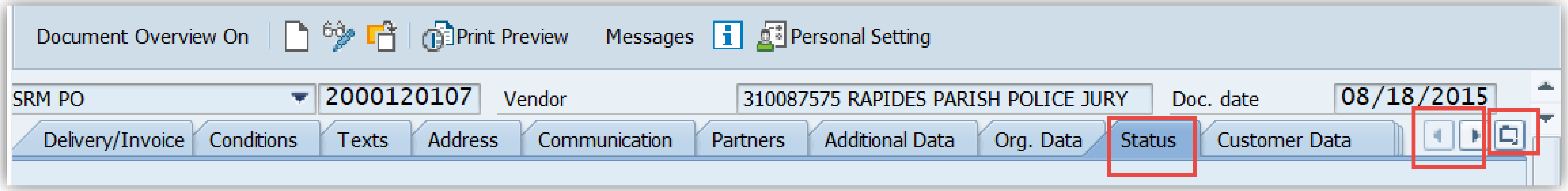


Tabs

To display all available tabs use the following buttons:

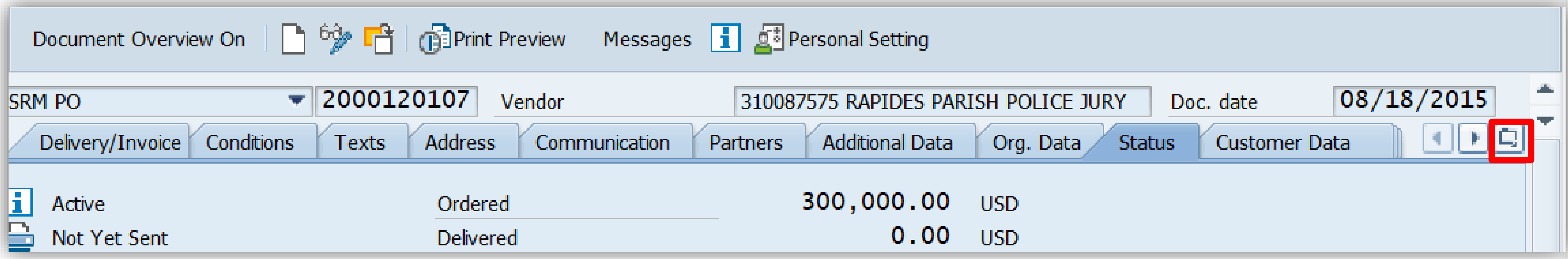
1. When a tab is *visible*, click on the tab name to open the tab.
2. When a tab is *hidden*, do one of the following:

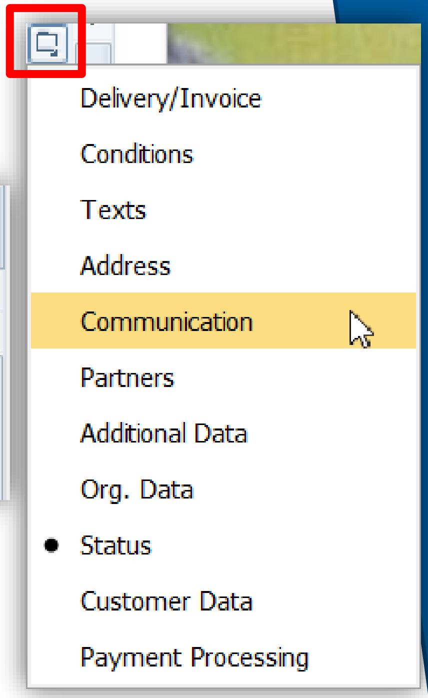
   a. Click on the **Forward** or **Backward tab navigation** button to find another tab, or
   b. Click on the **Tab drop-down** button to display all the tab values available and select the tab you need to view.



Tabs

*Click the highlighted **tab** and the **Tab drop-down** to see the options*





Reporting

This lesson has been designed to familiarize you with the **Reporting** functions. It will provide information so that you should be able to:

- Differentiate between Core Component (ECC) and Data Warehouse reports.
- Navigate and execute ECC reports.
- Perform the steps for ECC Reporting.

Reporting Overview

- Reports in the LaGov ERP system compile and summarize the outputs from transactions, e.g. documents, into a single output based on accurate, real-time information from the system.

- Reports allow users to do the following:
  - View data in a concise, standardized format
  - Analyze data from transactions using different criteria
  - Sort and group data
  - Save and re-use customized report extract criteria

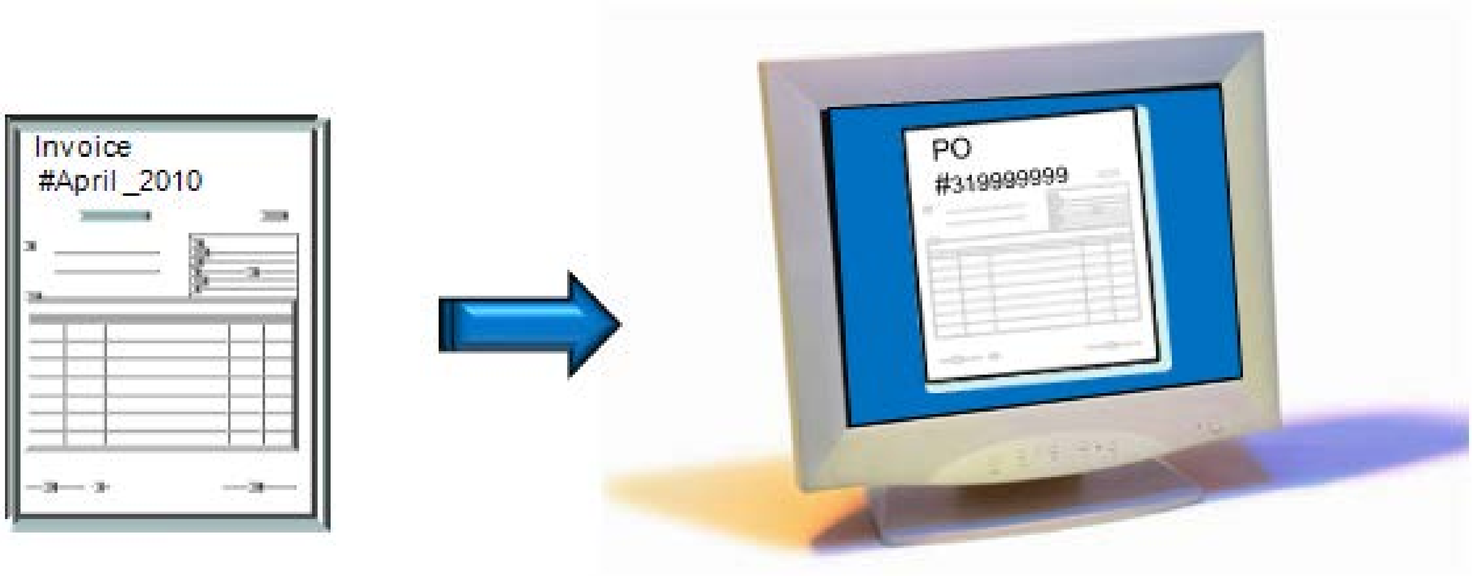
- Examples of this criteria include:
  - Posting Dates
  - Time periods
  - Grouping by department, plant, location, or module

How Transactions Work

Remember that when a user performs a transaction, they indirectly access the master records and create data tables.

Documents

- Each transaction is stored in the form of a document and has a unique number.
  - Documents are:
    - Evidence of business activity (audit trail).
    - Retained as a coherent unit that can be displayed at any time, until archived.
- Documents may be accessed and viewed by many end-users.



Two Types of Reports

Core Component (ECC) Reports

- Based on detailed transactions
- Real-time transactional data
- Contains all the details for a particular event

Data Warehouse (DW) Reports

- Focuses primarily on historical data
- Data is collated from various sources from the LaGov ERP System and other tools
- Data is summarized for specific reporting needs

Generating Reports

Each ECC report is identified by a unique transaction code and can be accessed by typing the transaction code in the command field, or by double-clicking on the report transaction code in the menu.

There are four general steps required when creating a report:

1. Report Selection
2. Data Selection
3. Displaying Results
4. Output Results

Report Selection

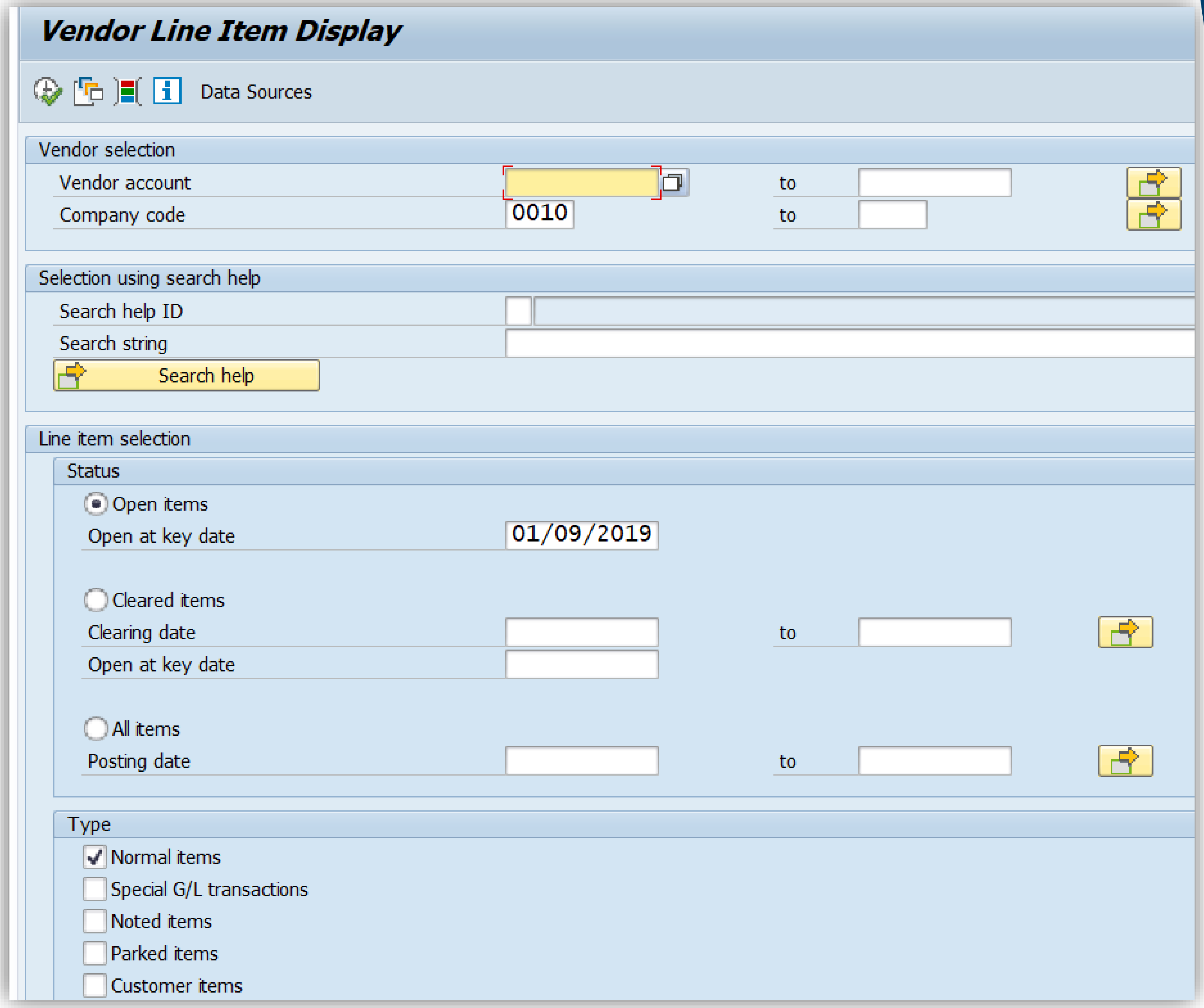
1 Report Selection

Determine the information you need and launch the appropriate report by either:

- Typing the transaction code in the command field – i.e. typing S_ALR_87012083 to access the List of Vendor Line Items Report,

Or

- Navigating to the report in the menu path, and double-clicking on the report.



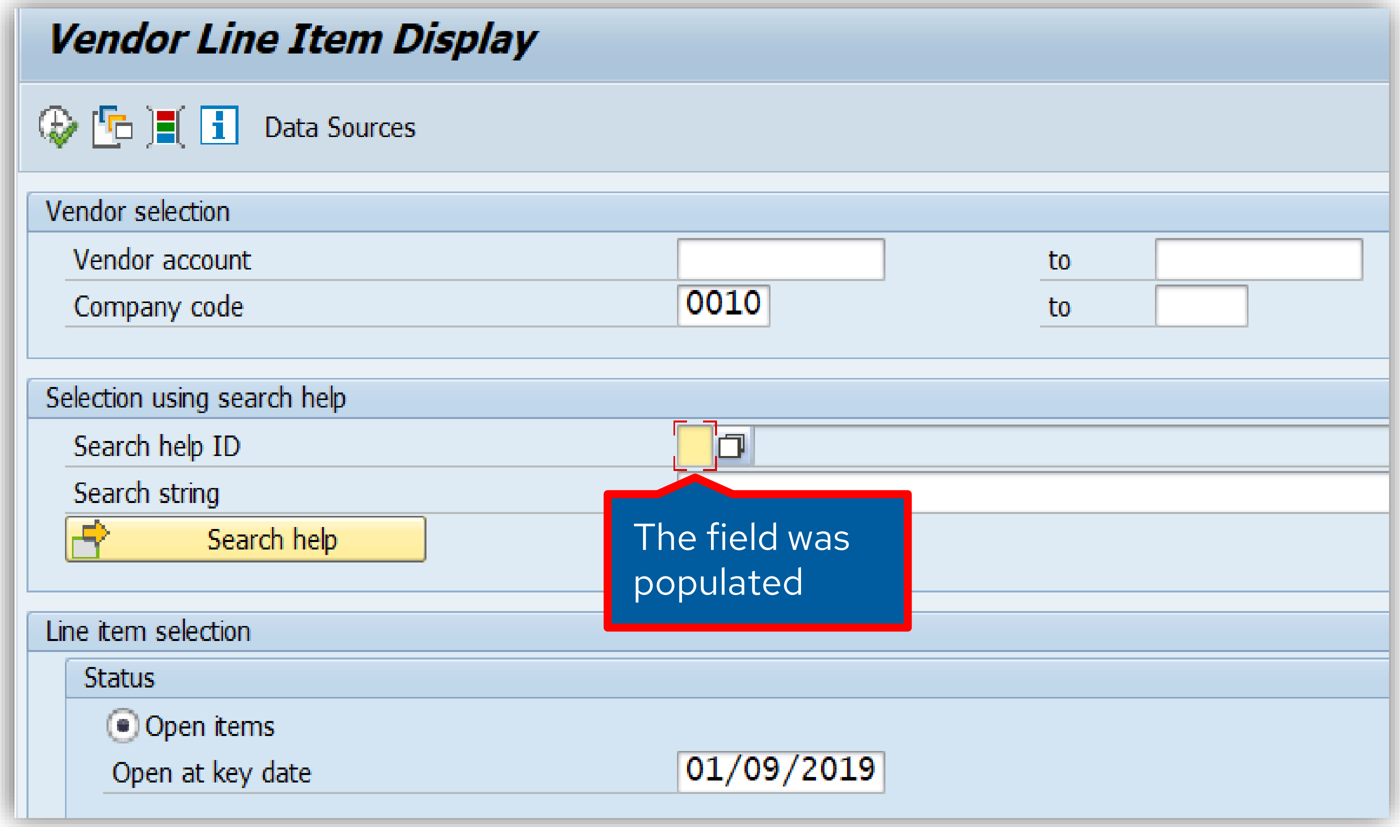
Data Selection

2 Data Selection

Narrowing your selection criteria is very important to display the best results:

- Enter selection criteria to be included in the report

NOTE: Only the data that matches these limits will appear in the report.



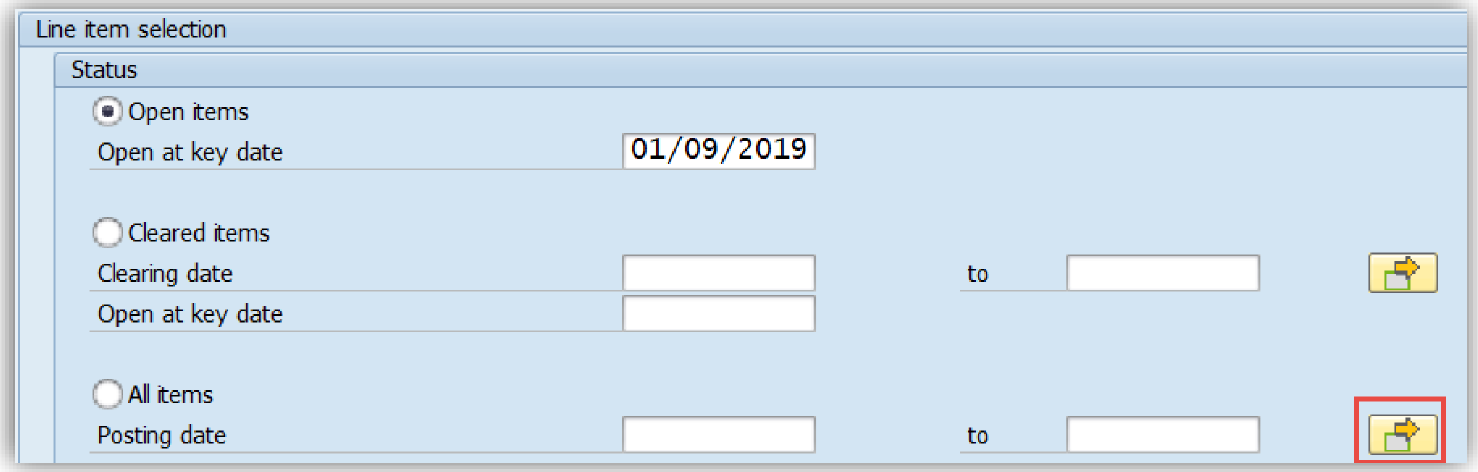
Click the Matchcode button and then double click the selection to populate the field

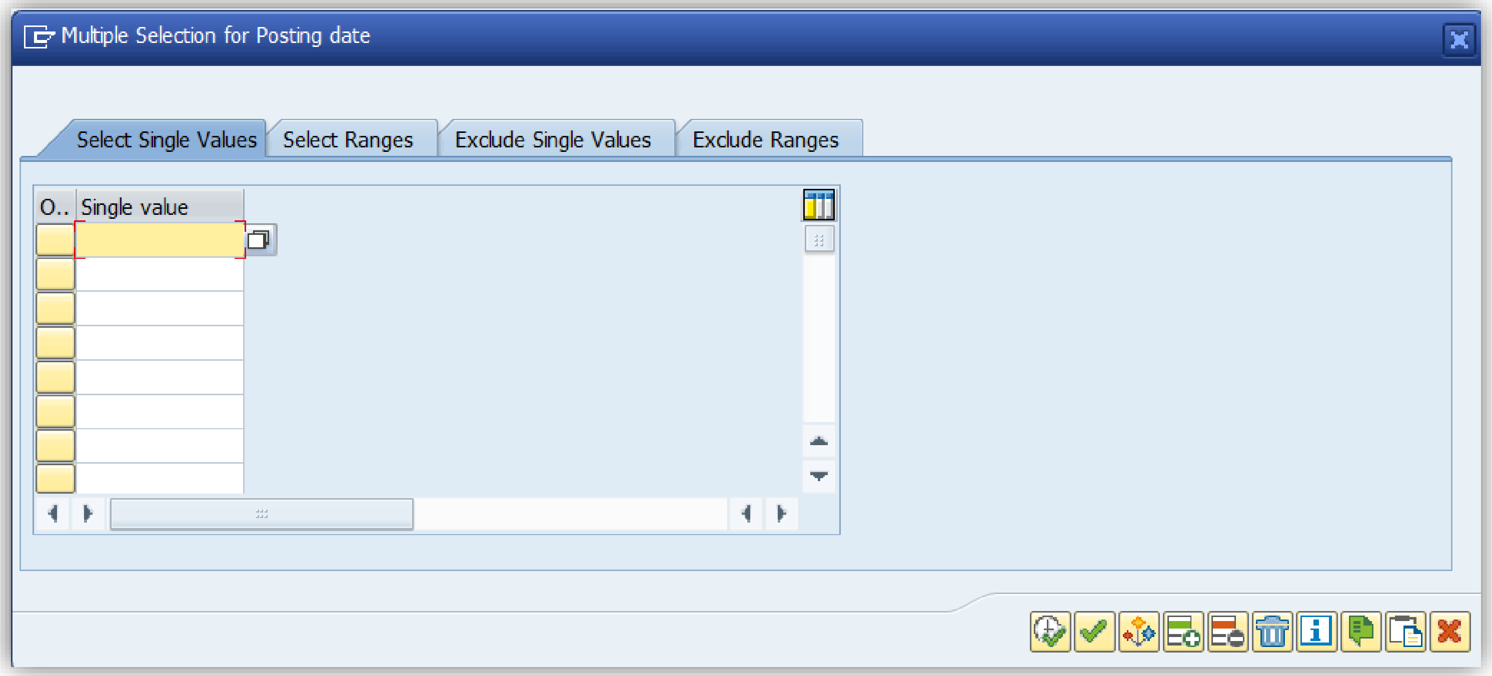
Data Selection (cont’d)

2 Data Selection

The **Multiple Selection** button lets you enter more than one range of numbers such as cost centers or dates.

You can also exclude values from ranges or enter individual nonconsecutive numbers.

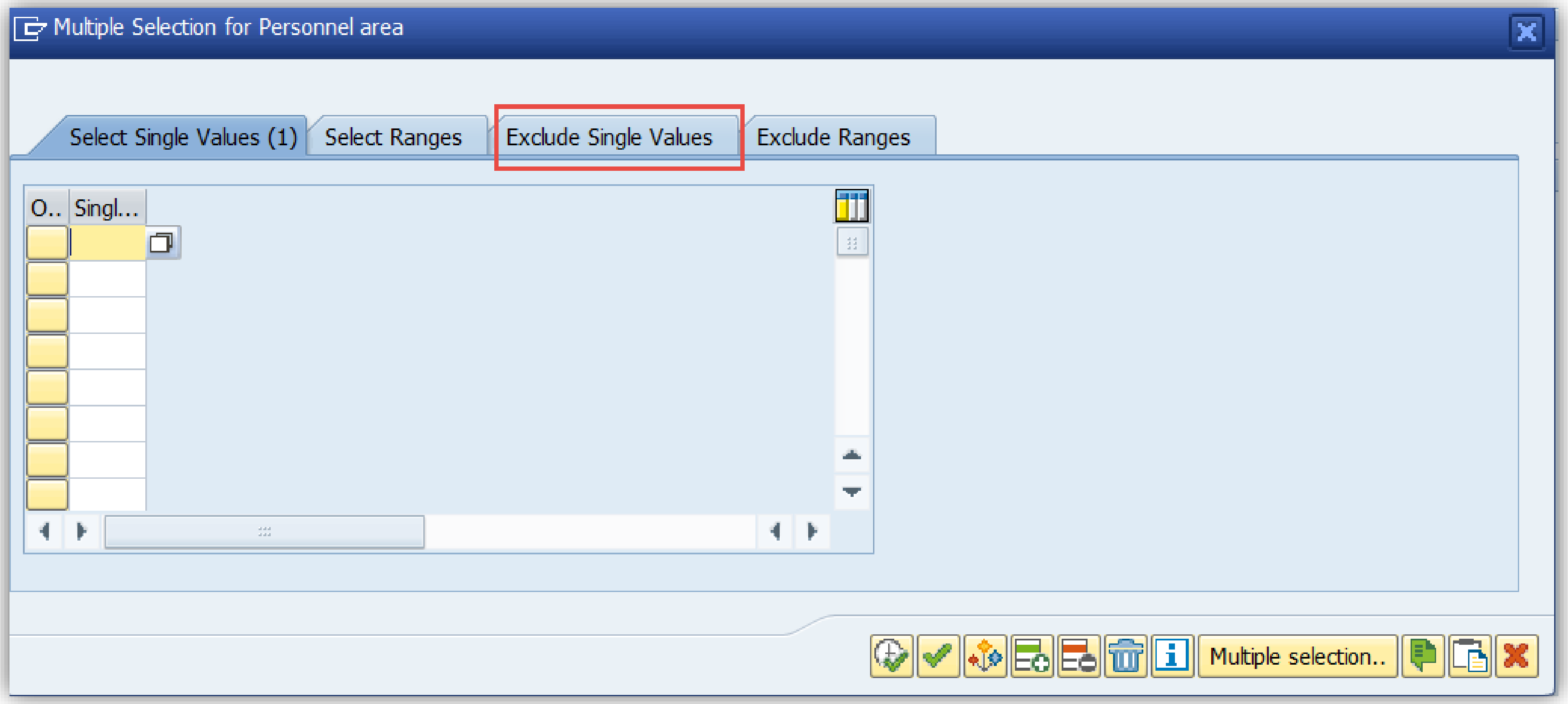




Multiple Selections

2 Data Selection

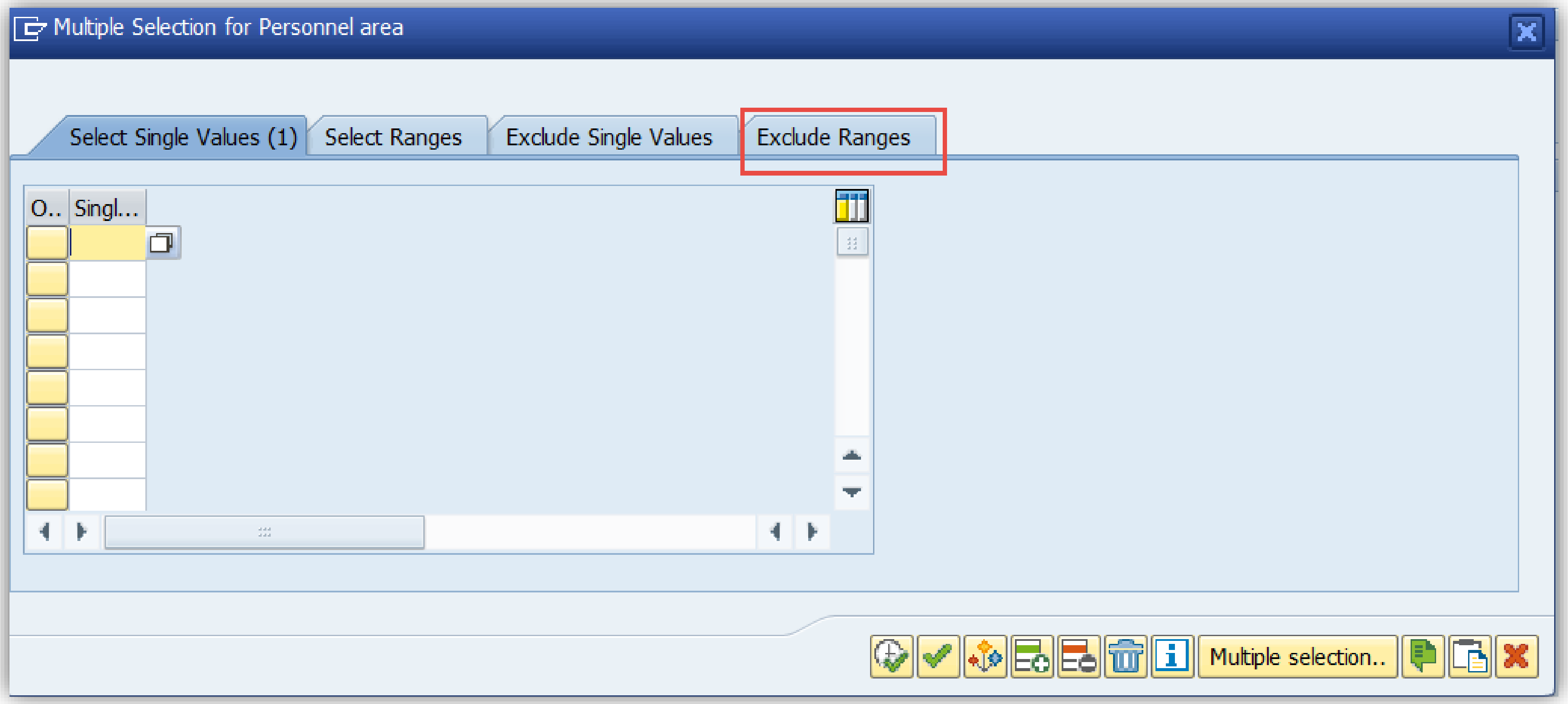
You can also use the **Multiple Selection** button to include or exclude individual **non-consecutive** numbers, such as zip codes 70817 and 70818 as shown below.



Multiple Ranges

2 Data Selection

You can also use the **Multiple Selection** button to include or exclude **multiple ranges** of numbers, such as dates from 2017 to 2018.



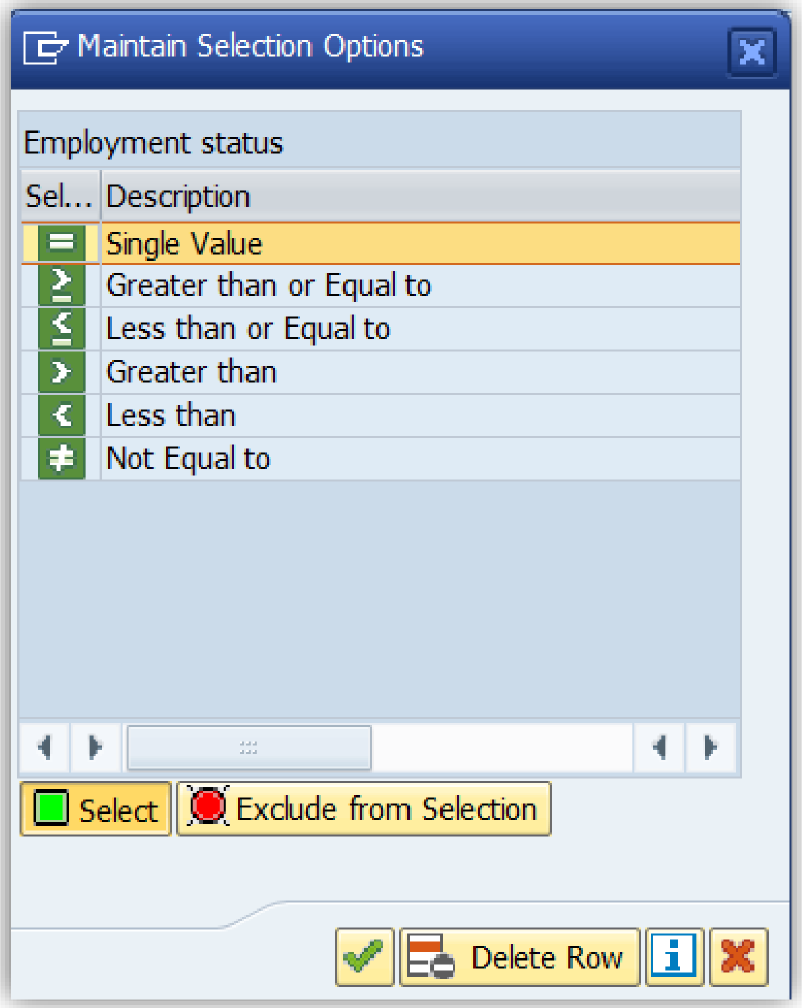
Multiple Selection Combinations

2 Data Selection

You can select multiple criteria in combination with each other:

- For example, you could run a report on all vendors in Baton Rouge but omit zip codes 70809 and 70808.
- You can use ranges of values such as **Greater than** or **Not Equal to.**

**You can use the Multiple Selection button either before or after entering your numbers.

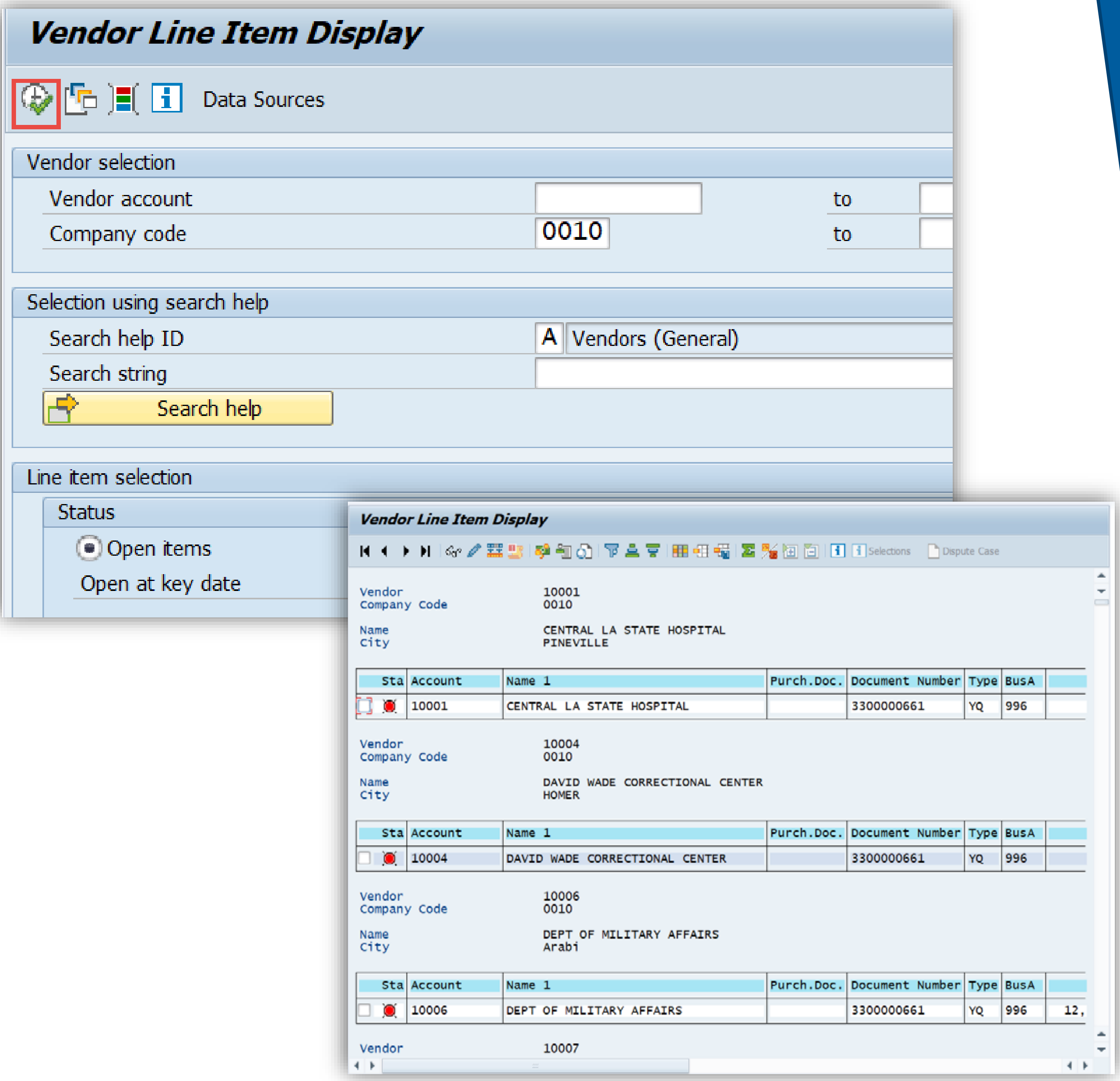


Displaying Results

3 Displaying Results

After you enter your selection criteria in the initial screen of the report and all the desired fields are populated:

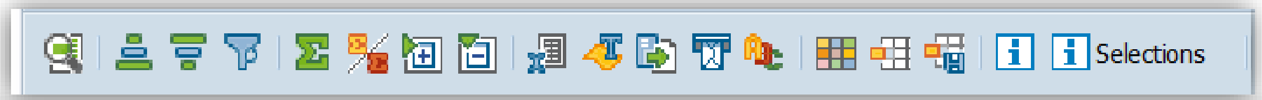
Click the Execute button to view the results

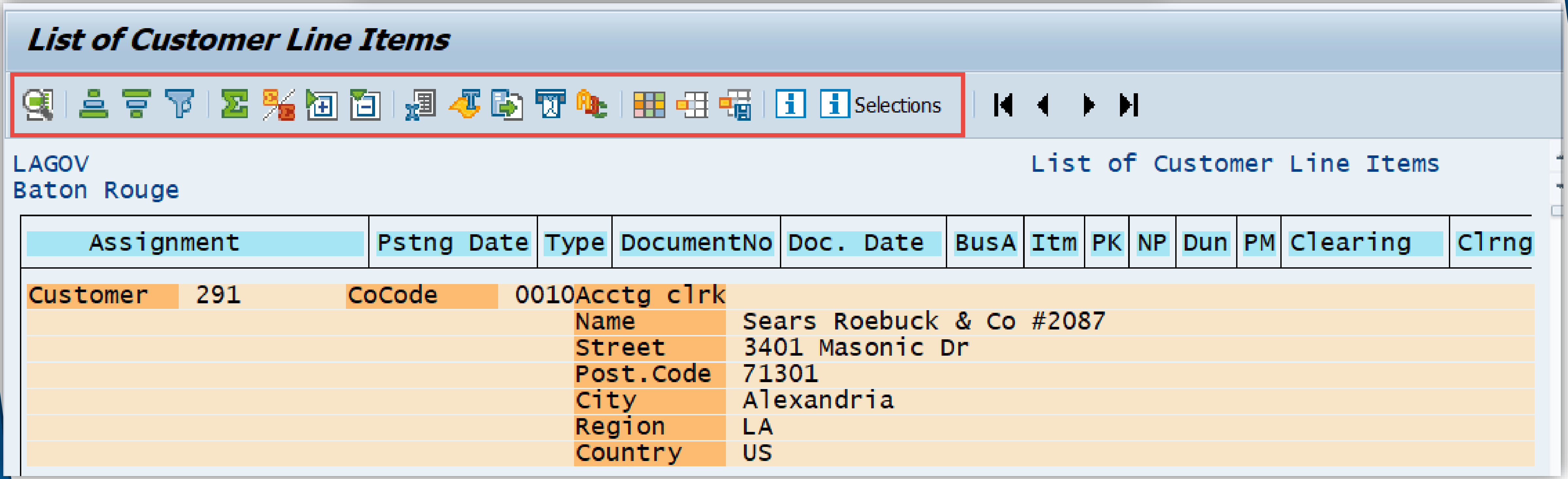


Displaying Results (cont'd)

3 Displaying Results

Once the results are displayed, you can manipulate the data using these buttons on the reporting application toolbar.





Reporting Application Toolbar

3 Displaying Results

Details	Allows you to view more detailed results for an item in the display list
Sort	Allows you to sort the results of a column in ascending or descending order
Set filter	Allows you to filter data by specific selection criteria
Totals	Allows you to convert and review the results of the report by totals of designated columns
Graphics	Allows you to graphically review the results of the report through the SAP Business Graphics window
Layout	Allows you to adjust the layout including selecting the layout and saving your selection
Number of Entries	Allows you to quickly learn the Current Number of Rows in a column
SAP Documentation	Provides more information, if available

Displaying Results – Data Filters

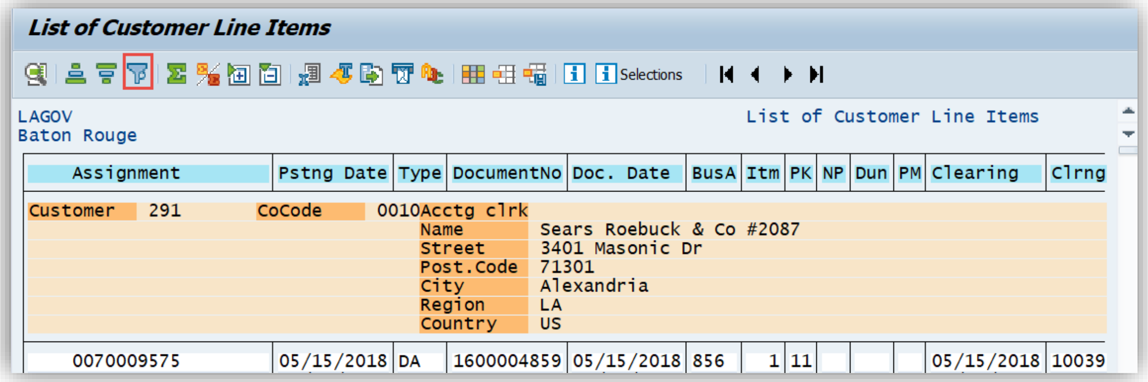
3 Data Filters

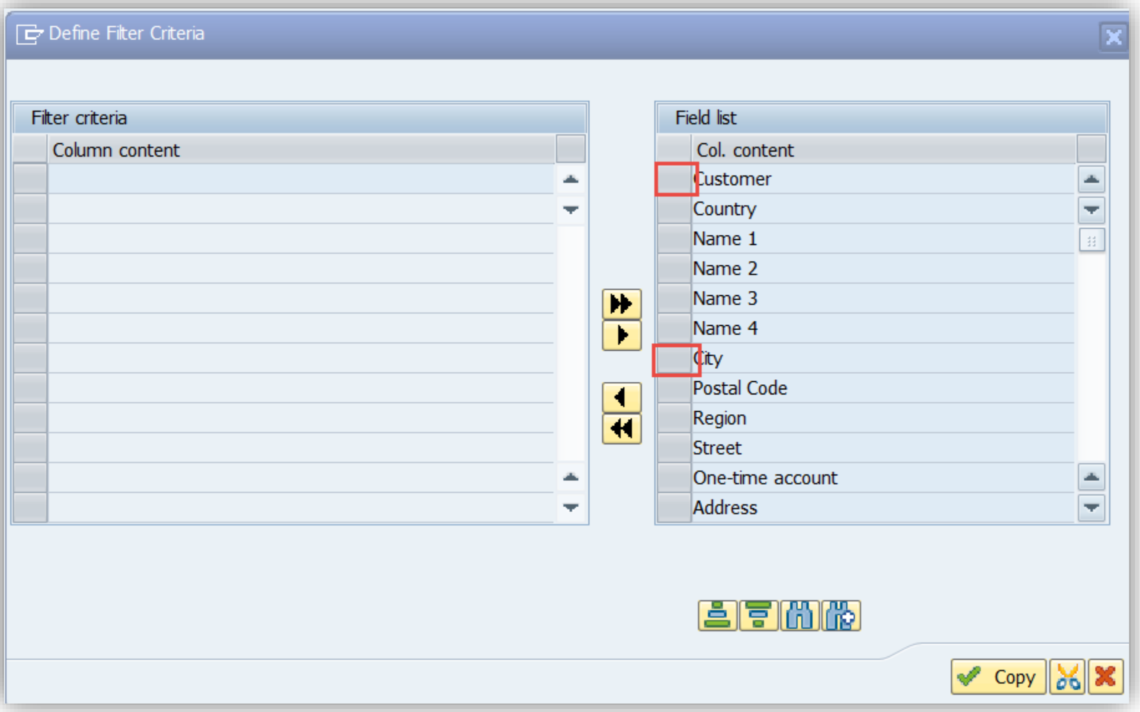
To filter data in a report:

1. Click the **Set Filter** button to open the *Define filter criteria* window.

2. Select the columns to be filtered by using the **left** and **right** arrow buttons.

3. Click the **Enter** Copy button to continue.



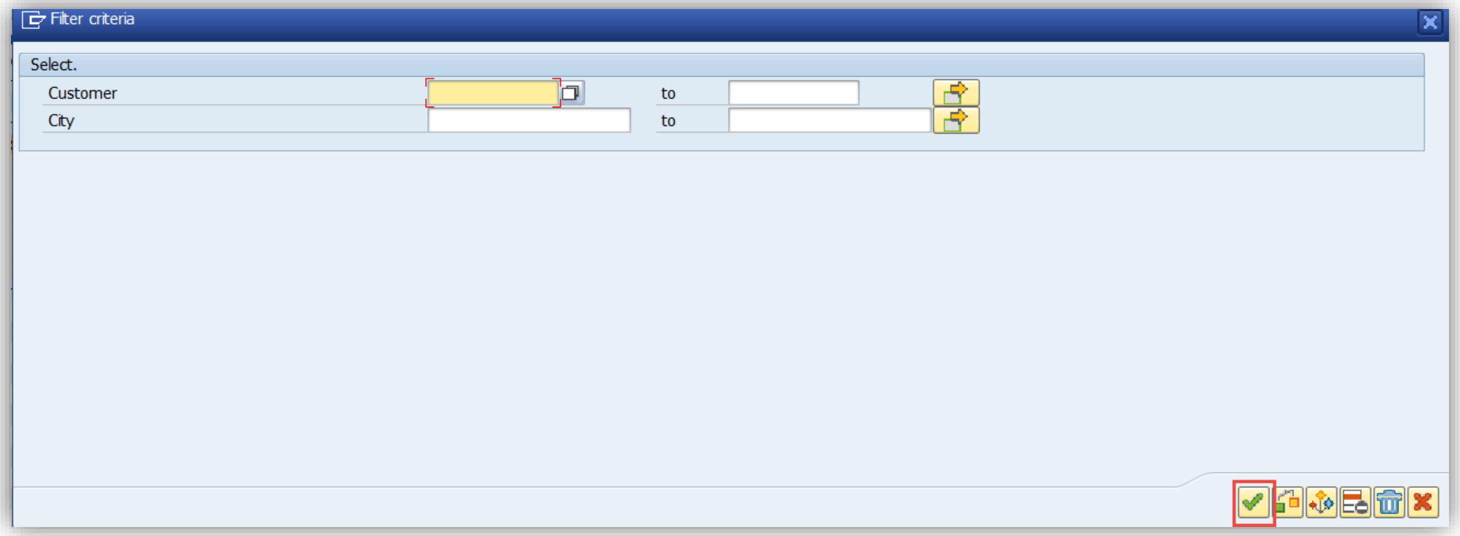


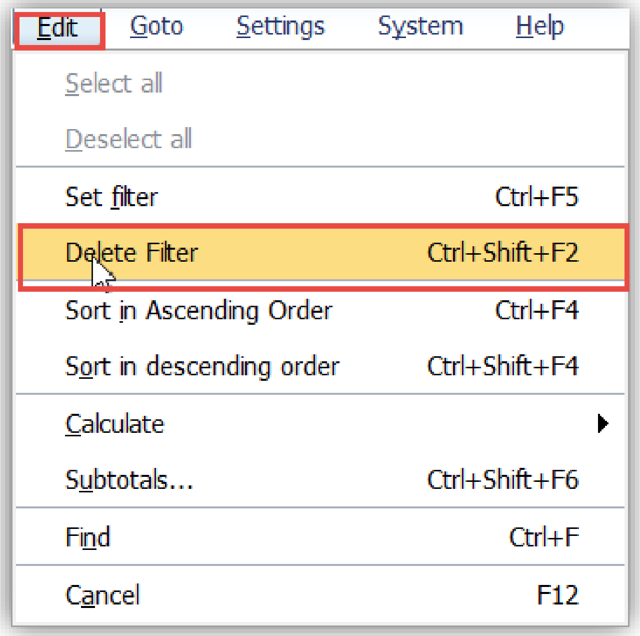
Displaying Results – Data Filters (cont'd)

3 Data Filters

4. When the *Filter criteria* window opens, enter the desired data value ranges to be displayed.

5. Click the **OK** button to view the filtered results.





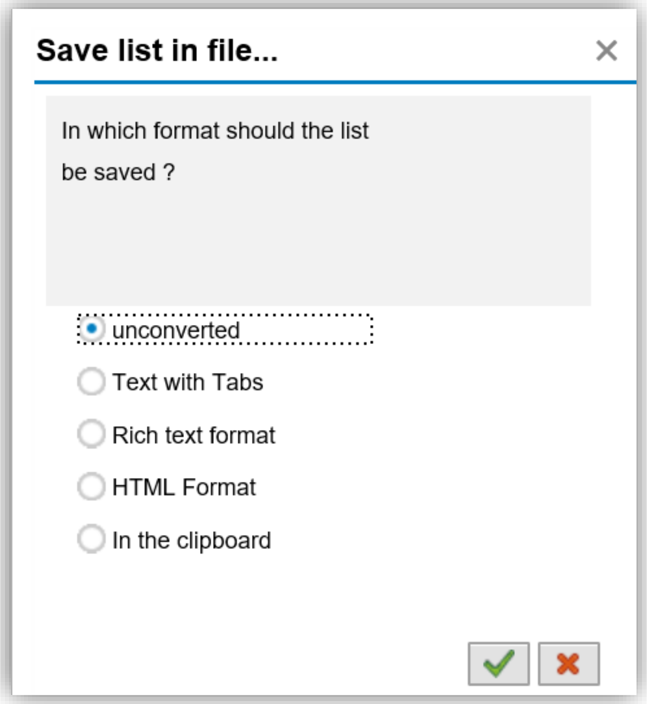
** To remove the filter, click Edit in the top navigation then select *Delete Filter* from the drop-down menu

Report Selection

4 Output Results

You can output the results (file or print out) to one of the following sources:

- Click the **Text with Tabs** button to save the file as an Excel file.
- Click the **Word Processing** button to save the file as an MS Word document.
- Click the **Local File** button to save your results as one of the following file formats:



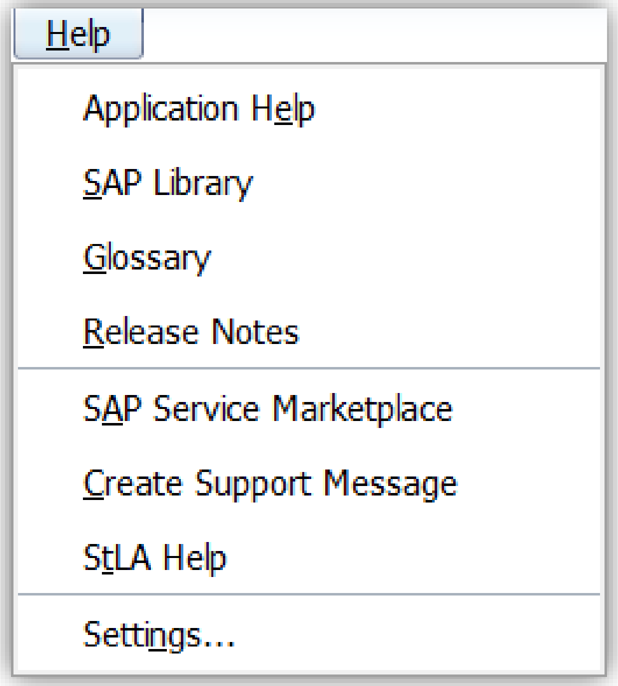
Help and Information

This lesson has been designed to familiarize you with the **Help and Information areas** in the Core Component. It will provide information so that you should be able to:

- Identify the Help and Information Areas.
- Use the online help functions.

Help Menu

While in the Core Component you may encounter instances where additional information is needed to proceed. The **Help Menu** has many options for retrieving the relevant information.

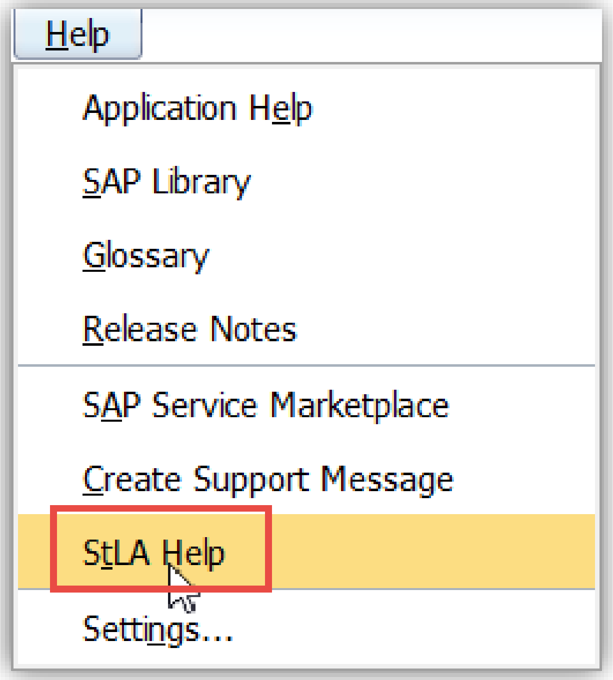


Help Menu Options

The **StLA Help** option accesses LaGov help in the LaGov portal.

- It contains LaGov specific information and Help scripts and simulations for each transaction.

Menu Path: Help → StLA Help



Other Help Options

Other help options include the following:

- **Help Desk**
- **Field Help**

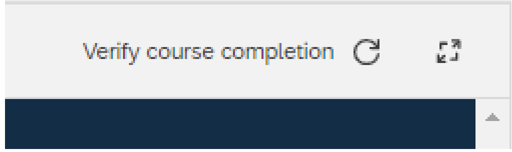
Press F1 or click the **Help** icon in the tool bar for an explanation of the use of a particular field

- **HelpScripts** in LaGov Help with step-by-step instructions for each transaction.

Click here to launch the LaGov Help Website

Course Complete!

Select the Verify course completion icon at the top right.



You will see a pop up similar to the one below with the option to print a certificate or return to “My Learning Assignments”.