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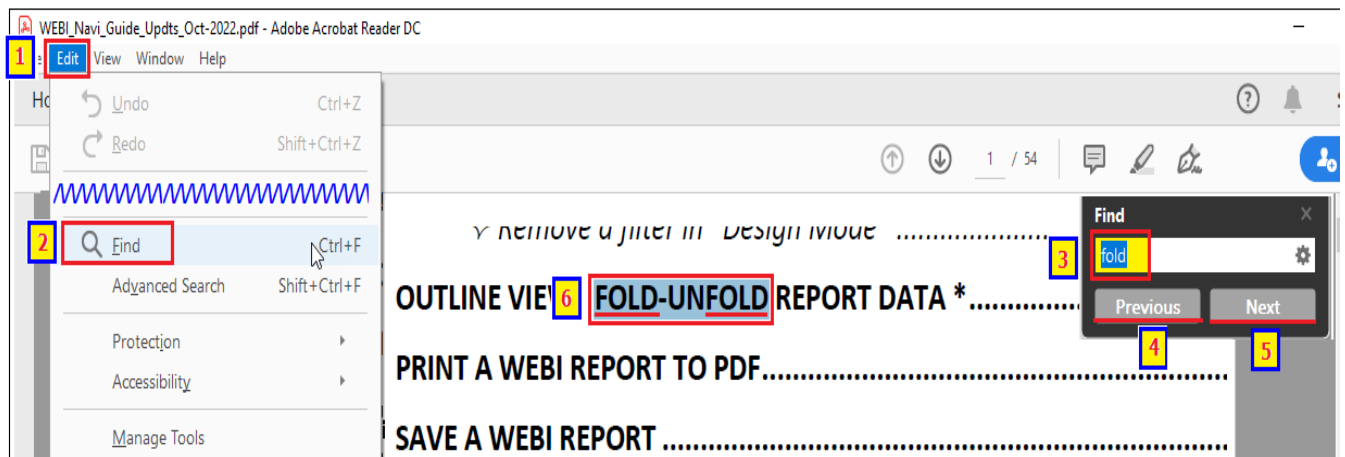
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SEARCH FOR INFO IN THIS DOCUMENT

To quickly find information in this document on a particular subject, you can use the FIND feature of Adobe Reader and search for a key word.

- 1 Click **Edit** on the tool bar.
 - 2 Click **Find** in the dropdown list that displays.
(Short-cut key alternative: hold down the <Ctrl> key & press the “F” (for “Find”) key).
 - The **Find** window will be displayed.
 - 3 Type the search text (‘fold’ in this example) in the window.
 - 4 To search for the previous occurrence, click **Previous** button.
 - 5 To search for the next occurrence, click **Next** button.
- The occurrence of the text will be found & highlighted in blue.






LOG INTO THE DATA WAREHOUSE

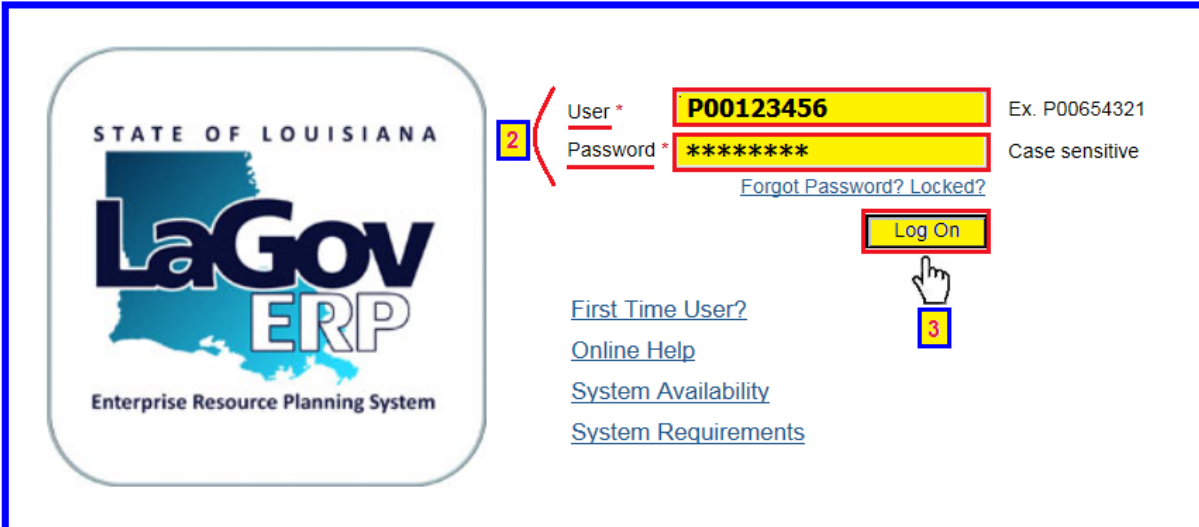
- 1 Access LaGov using the **Launch LaGov Portal** desktop icon.



The Log On screen will be displayed.

- 2 Enter your *Personnel id. and password* (your LEO password & i.d.).

- 3 Click **Log On** or press .




The screenshot shows the LaGov ERP logon interface. On the left is the 'STATE OF LOUISIANA LaGov ERP Enterprise Resource Planning System' logo. On the right, there are input fields for 'User *' (containing 'P00123456') and 'Password *' (containing '*****'). To the right of these fields are examples: 'Ex. P00654321' and 'Case sensitive'. Below the password field are links for 'Forgot Password? Locked?'. A 'Log On' button is highlighted with a red box and a hand cursor icon. Below the button are links for 'First Time User?', 'Online Help', 'System Availability', and 'System Requirements'. A red bracket and the number '2' point to the input fields. A blue box and the number '3' point to the 'Log On' button.



Be aware that while you are signed on to LaGov ERP, **your personal and financial information are accessible through LEO.** When you are logged on, **do not leave your PC unlocked.**





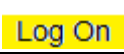

You may also log in to the Data Warehouse via  website: <http://louisiana.gov/>
However, other LaGov systems (ECC – Financial, SRM – Purchasing) *may* not be fully functional when you sign on this way.

1 Log onto <http://louisiana.gov/>.

2 Scroll to the bottom and click on  

3 Click on  

4 Enter your Personnel id. and password (your LEO password & id.).

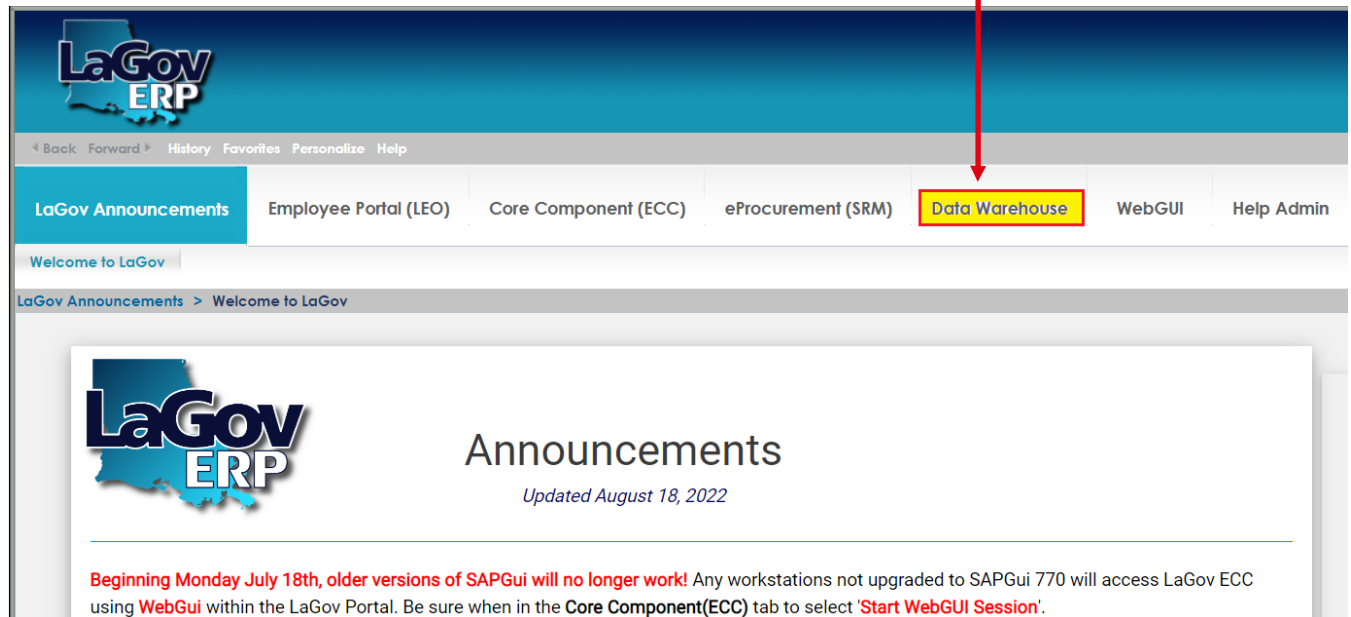
5 Click  or press .



OVERVIEW OF DATA WAREHOUSE

We highly recommend that you take a few minutes to **READ the LaGov Announcement Page**, as it may contain **critical** information regarding the system's function.

Click on the **Data Warehouse** tab to open the Data Warehouse portal.





■ Data Warehouse Announcements



We highly recommend that you take a few minutes to **READ the Data Warehouse Announcement Page**. It contains beneficial information, such as:

- system downtime
- newly created reports
- links to new HELP information
- reminders of reports available to help with fiscal year end tasks

Not only will reading the Data Warehouse Announcements save you time and frustration, you may pick up a useful tip or two along the way ! 😊

Data Warehouse Announcements

Last Revised: 08-11-2022

The LaGov Data Warehouse contains custom reports and dashboards. The nightly cycle extracts data from the Financial System (ECC) and Purchasing System (SRM) and loads it into the Business Intelligence System (BI). All LaGov Systems (ECC, SRM & BI) are in sync each morning before the Data Warehouse Reports are refreshed.

To open a Help Desk ticket, use the [Submit a LaGov Help Ticket](#) tab above.

Report Updates and Enhancements

(08/11/2022)

For details on how to run the LaGov General Ledger Report for Period 12 and for Period 12 Extended, click [Here](#).

Finance

- Accounts Payable
 - Check and ACH
 - Check and ACH** *← Current FY Data*

The **Check and ACH** report can be used to display Paper Checks and EFT payments.

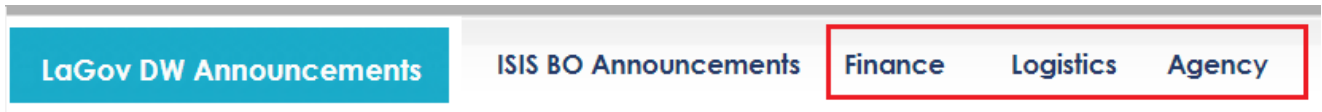
- The report runs each day for ALL agencies for the current fiscal year. However, there are instances when users may choose to run the report.
- For details on how to run the Check & ACH report, click [Here](#)



■ Navigating the Data Warehouse


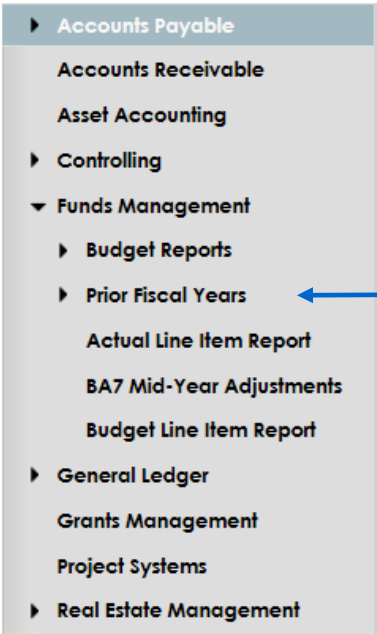

✧ Portal Tabs

The Data Warehouse portal tabs outlined in **red** provide access to reports created by the Business Intelligence Team (a.k.a the Data Warehouse Team) for the LaGov modules ECC (Financial) and SRM (Logistics/Purchasing), and for agencies with unique data and reporting needs.


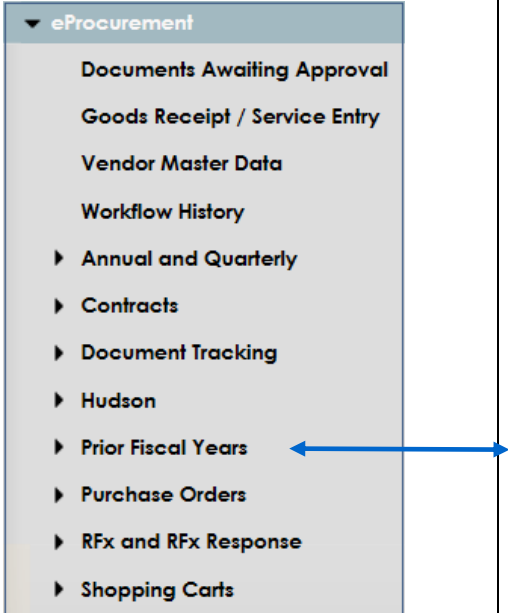


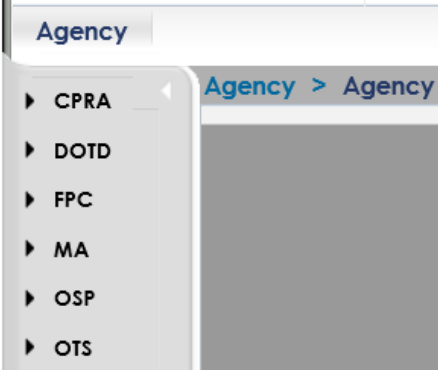


The security assigned to your position number determines what portal tabs will display. For instance if you are not in a Control Agency position, you will not see that tab.

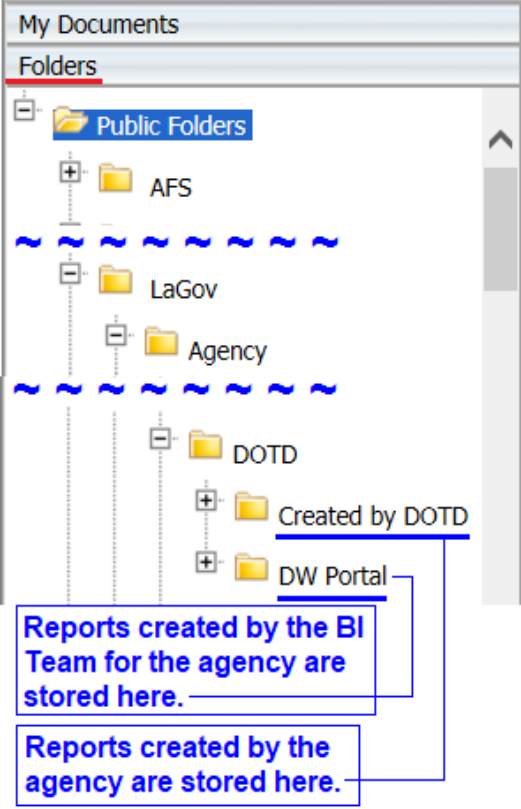
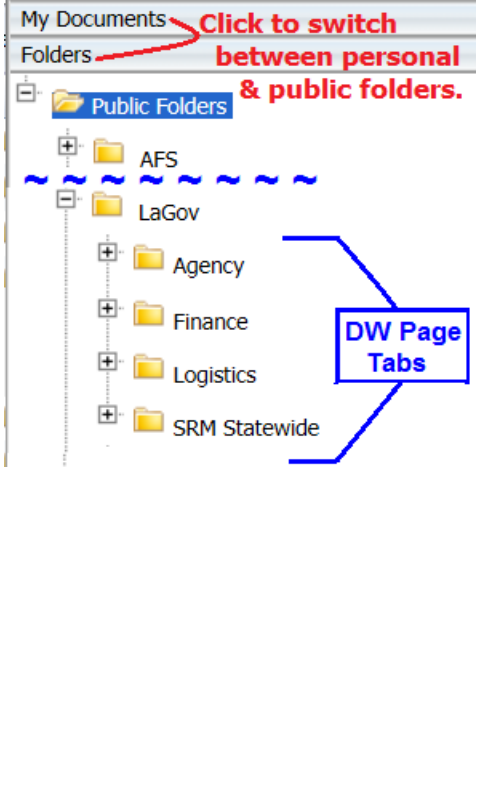
Clicking on the tabs will display a **Detailed Navigation panel** so folders, subfolders and reports maybe accessed.

Tab Name	Accesses Custom Reports Created by the BI Team for...	Description
	<p>ECC Module – Enterprise Central Components</p> 	<p>The LaGov Finance System (AFS in the Legacy ISIS System)</p> <p>Reports that are date driven will have historical versions in the  Prior Fiscal Years folder.</p>



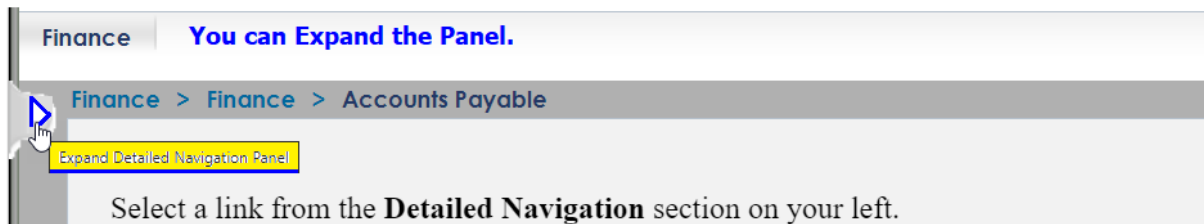
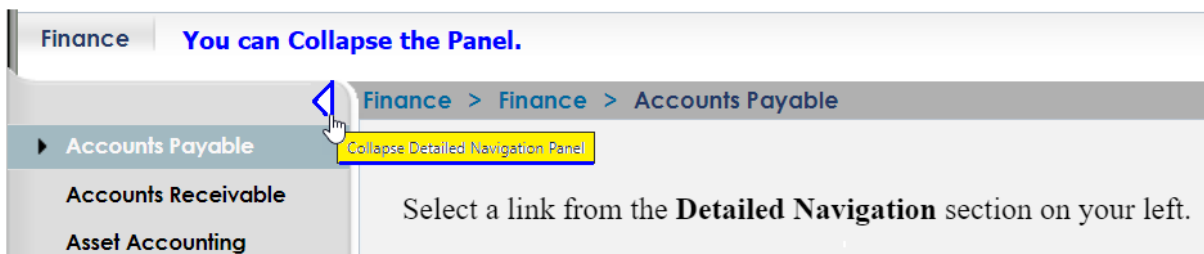
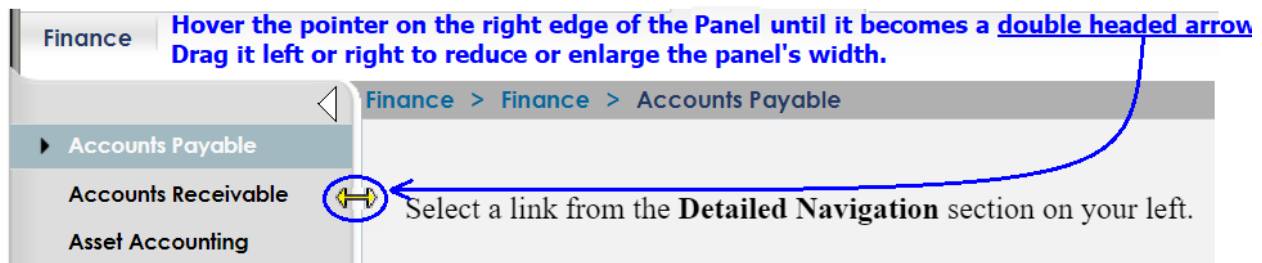
Tab Name	Accesses Custom Reports Created by the BI Team for...	Description
	<p>SRM Module – Supplier Relationship Mgt</p> 	<p>The LaGov Purchasing System</p> <p>Reports that are date driven will have historical versions in the  Prior Fiscal Years folder.</p>
		<p>These folders have custom reports for LaGov agencies and departments with unique reporting needs that the reports under the Finance & Logistics tabs do not meet.</p>



Tab Name	Accesses Custom Reports Created by the BI Team and by Users.	Description
<div>Launchpad (Infoview)</div> <p>This tab is for viewing, editing and creating Agency reports under <u>Folders</u>.</p> <p>Folders that correspond to the tabs on the DW page are located here as well and contain the reports available in the Portal.</p> <p>Click My Documents to access personal folders like "My Favorites" & your BI Inbox.</p>	 <p>My Documents</p> <p>Folders</p> <p>Public Folders</p> <p>AFS</p> <p>LaGov</p> <p>Agency</p> <p>DOTD</p> <p>Created by DOTD</p> <p>DW Portal</p> <p>Reports created by the BI Team for the agency are stored here.</p> <p>Reports created by the agency are stored here.</p>	 <p>My Documents</p> <p>Folders</p> <p>Public Folders</p> <p>AFS</p> <p>LaGov</p> <p>Agency</p> <p>Finance</p> <p>Logistics</p> <p>SRM Statewide</p> <p>Click to switch between personal & public folders.</p> <p>DW Page Tabs</p>



✧ Detailed Navigation Panel



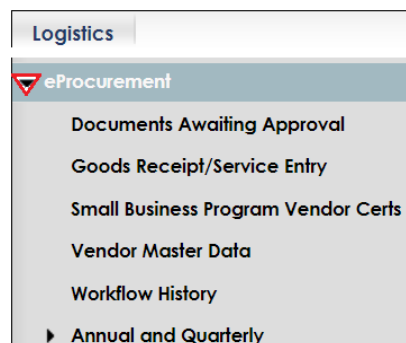
✧ Directory of Reports

Right-pointing triangle
= **Reports hidden**

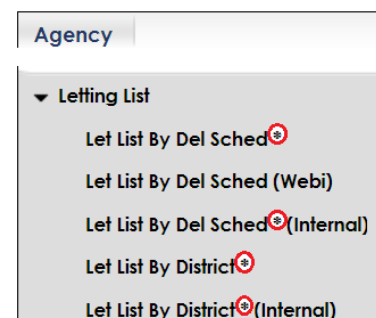


No triangle = no reports
or sub-folders that folder.

Down-pointing triangle
= **Reports displayed**



Reports with **asterisks ***
are **Crystal Reports**



All other reports are **Webi**



NAVIGATING A WEBI REPORT *

■ Components of a Webi Report *

Side Panel & Icons *Close Side Panel* *Report Window* *In READING mode*

Web Intelligence Reading Design ?

Input Controls

Map Reset

Check Number (Ex: 71...)

Vendor Number (Ex: 3...)

Vendor Name

All values

Payment Document Nu...

Business Area

☒ Select (All)

☒ 109 - GOV-COAST PRO

☒ 270 - DEPT TRANSPNTN

☒ 273 - DOTD ADMINIST

☒ 274 - PUBLIC IMPROVE

Number of Days Outsta...

☒ Select (All)

☒ 0 to 30 days

☒ 61 to 90 days

**STATE OF LOUISIANA
Aged Outstanding Checks**

Report Date: 10/20/14

Vendor Name	Vendor Number	Check Number	Bus Area	Payment Document	Print/Check Date	Check Amount	Days O/S	Amount O/S (1-30 days)	Amount O/S (31-60 days)
108 WESTERN PROPERTIES LLC	310033294	0000000137768	276	2000169447	06/27/2014	\$259.38	115		
108 WESTERN PROPERTIES LLC	Count of distinct checks:	1	Total Check Amounts:	\$259.38					
310001080	310005620	0000000137854	512	2000169595	10/08/2014	\$5.00	12	\$5.00	
310001080	Count of distinct checks:	1	Total Check Amounts:	\$5.00				\$5.00	
ACADIAN ENGINEERS & ENVR CONSUL	310002817	0000000137541	270	2000169168	06/27/2014	\$3,186.50	115		
ACADIAN ENGINEERS & ENVR CONSUL	Count of distinct checks:	1	Total Check Amounts:	\$3,186.50					
ACME GLASS CO OF ALEXANDRIA INC	310003116	0000000025808	276	2000030474	07/26/2011	\$468.88	1,182		
	310003116	0000000027716	276	2000032818	08/09/2011	\$205.13	1,168		
ACME GLASS CO OF ALEXANDRIA INC	Count of distinct checks:	2	Total Check Amounts:	\$674.01					
ACTIVE STEEL WELDING & REPAIR, INC	STLA1099M	0000000137088	276	2000169030	06/24/2014	\$1,000.00	118		
ACTIVE STEEL WELDING & REPAIR, INC	Count of distinct checks:	1	Total Check Amounts:	\$1,000.00					
ALACK REFRIGERATION CO INC	310003985	0000000136172	276	2000167383	06/17/2014	\$1,230.00	125		
ALACK REFRIGERATION CO INC	Count of distinct checks:	1	Total Check Amounts:	\$1,230.00					
AMERICAN EXPRESS TRS	310005296	0000000137826	276	2000169515	07/04/2014	\$5,924.86	108		
AMERICAN EXPRESS TRS	Count of distinct checks:	1	Total Check Amounts:	\$5,924.86					
AMERICAN KEY & LOCK CO INC	310005433	0000000137195	276	2000168729	06/24/2014	\$10.85	118		
AMERICAN KEY & LOCK CO INC	Count of distinct checks:	1	Total Check Amounts:	\$10.85					
ANDERSON MACHINE & WELDING, INC.	310051984	0000000137014	276	2000168467	06/20/2014	\$80.71	122		

Aged Outstanding Checks **Aged O/S Checks (Raw Data)** **Quick Tips & Stats**

Track changes: Off Page 1 of 1+ 100% 7 days ago

Report Tabs *Page & Zoom Tools*



✧ **Reading and Design Modes ***

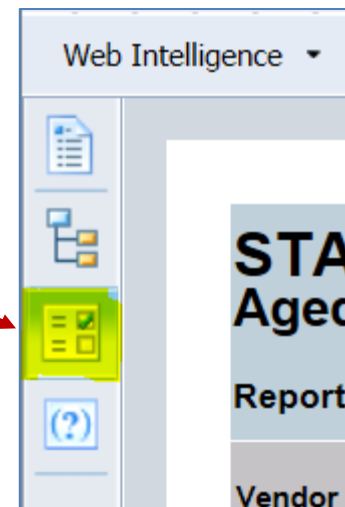
- The Reading and Design Mode icons are located in the upper right corner of the Webi toolbar.
- READING Mode is a “view only” mode.
- DESIGN Mode allows the user more functionality



✧ **Side Panel and Icons ***

If you open the report, and the side panel is not displayed ...click on one of the **Side Panel icons**.

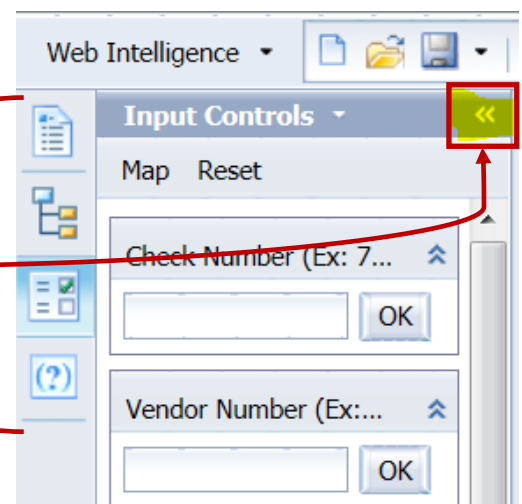
The 3rd icon is the **Input Controls**.



To Open/Close the side panel is a toggle function.

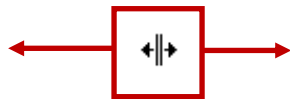
Click on one of the icons to **OPEN** the panel.

Click on the double arrow to **CLOSE** the panel.

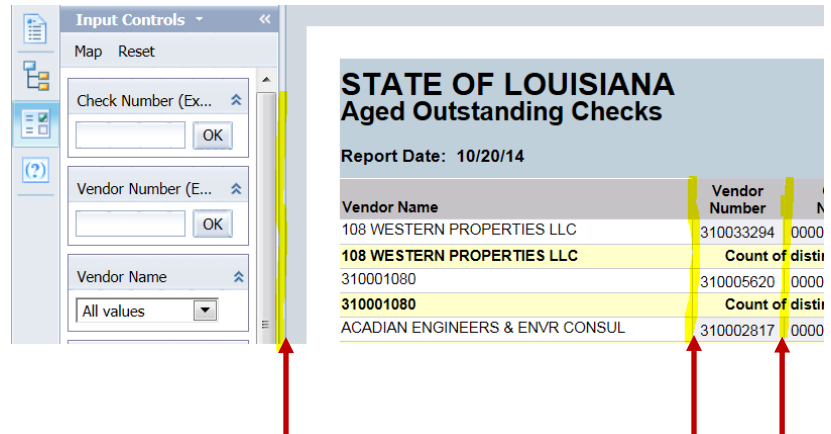




Resize the side panel (and/or any report column) by hovering over the **edge** of the panel or column until the cursor turns into a **double-headed arrow, (cursor)**.

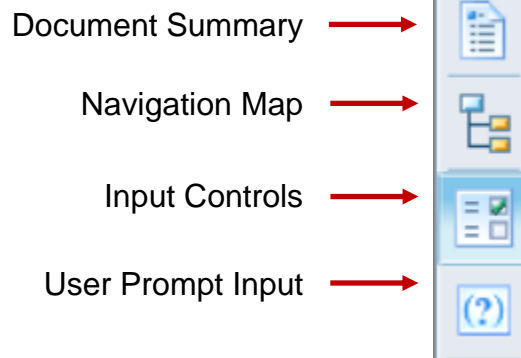


Click & drag the arrow right to increase or left to decrease column width.



✧ **Side Panel Icons in Reading Mode ***

Located to the left of the side panel:



See the Appendix for details on the toolbar and report panel icons in these toolbars.



✧ Report Window

Webi's **Report Window** contains the following components:

- **Report header**

- **Column headers**

- **Report body**

- **Report footer**

STATE OF LOUISIANA Aged Outstanding Checks			
Report Date: 10/20/14			
Vendor Name	Vendor Number	Check Number	Bus Area
108 WESTERN PROPERTIES LLC	310033294	0000000137768	276
108 WESTERN PROPERTIES LLC	Count of distinct checks:		1
310001080	310005620	0000000137854	512
310001080	Count of distinct checks:		1
ACADIAN ENGINEERS & ENVR CONSUL	310002817	0000000137541	270
ACADIAN ENGINEERS & ENVR CONSUL	Count of distinct checks:		1
ACME GLASS CO OF ALEXANDRIA INC	310003116	0000000025808	276
	310003116	0000000027716	276

Page 1 of 26 Version: 1.14.2

✧ Report Toolbars *

There is only one Webi toolbar in Reading Mode (view only mode).



See the **Appendix** for details on the functions of the icons in these toolbars.



✧ Webi Report's ZOOM Tools *

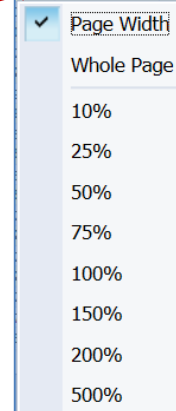
There are (2) ways to change ZOOM (viewing) levels

- The Webi Report ZOOM Tool and the Browser ZOOM Tool



The **Report's ZOOM Tool** is located at the bottom right of the report next to the Page Tool.

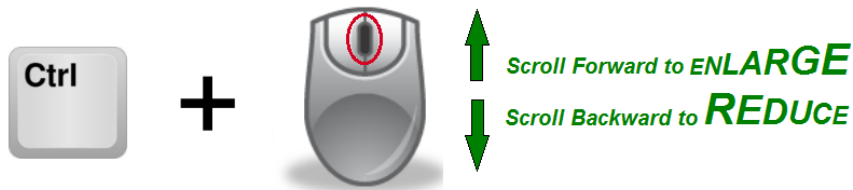
- Click on the drop down menu's arrow for pre-selected zoom sizes.
- **The Report ZOOM Tool zooms report body only**
 - not the report's toolbars
 - not the browser's elements



You can also use the **browser zoom feature** to increase or decrease the display size.
This feature zooms both the report body *and* the browser elements.

To use the **browser zoom feature**, hold down the **CTRL key**, and use the **scroll wheel** on the mouse to increase or decrease the zoom effect.

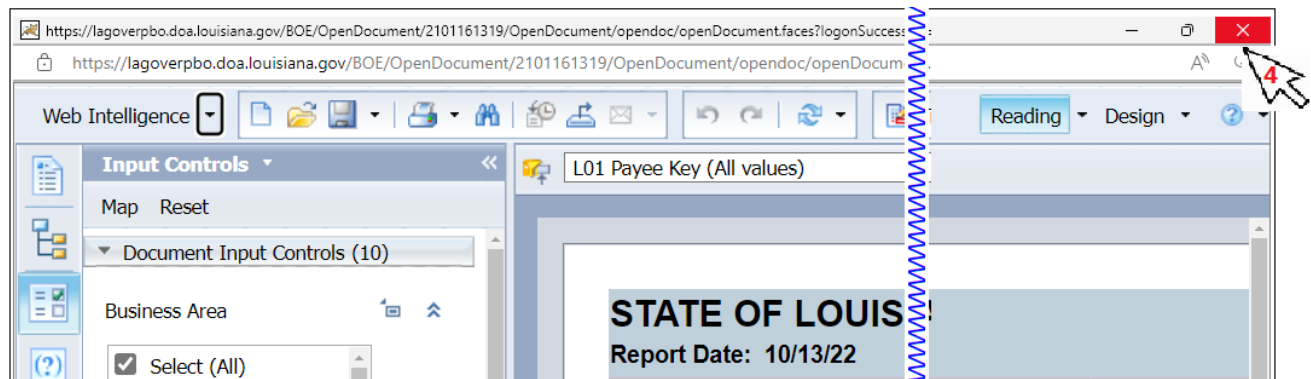
Scroll forward to enlarge the image. Scroll backward from the screen to reduce the image.



The Windows magnifier tool  is no longer supported.



✧ Open / Close a Webi Report in the Portal *

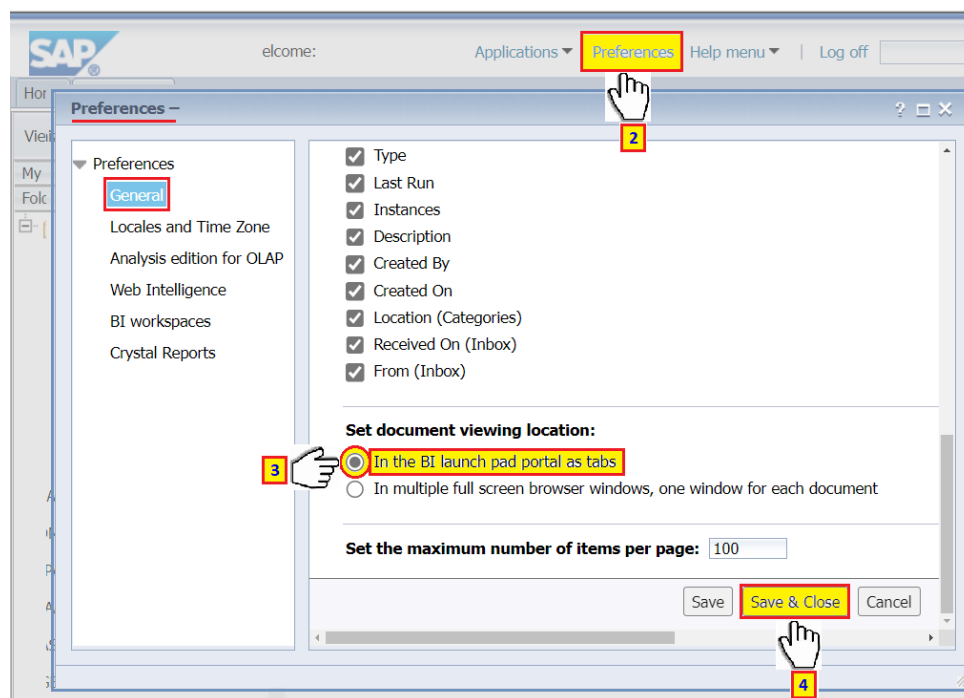





✧ Pinning a Tab for future viewing

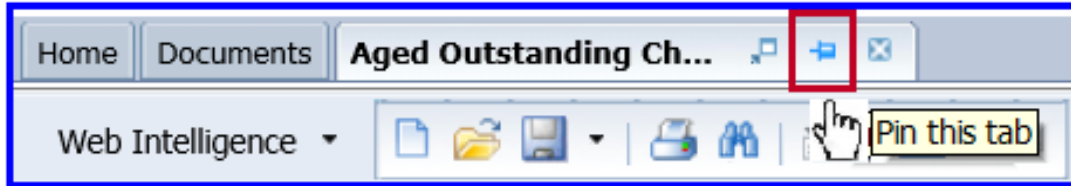
A document or instance that is frequently viewed in the **Launchpad (Infoview)** may be pinned to a tab.


Before you can pin a tab, BI launch pad preferences must be updated to enable tabbed document viewing. In **General Preferences**, under **Set document viewing location**, choose to open documents on a new browser tab instead of a new browser window.




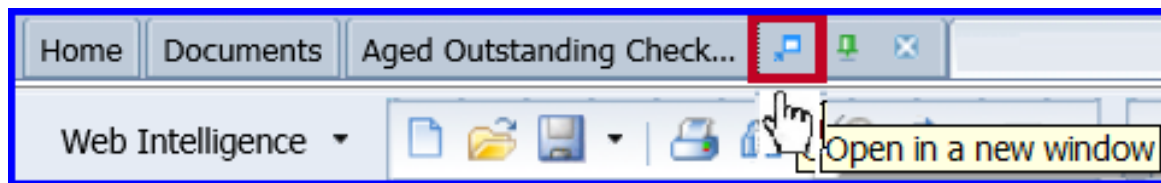




Now when a report tab is opened in **Launchpad (Infoview)**, the push pin icon  will be available. Click it to make the document automatically appear as a tab the next time you log on through **Launchpad (Infoview)**.

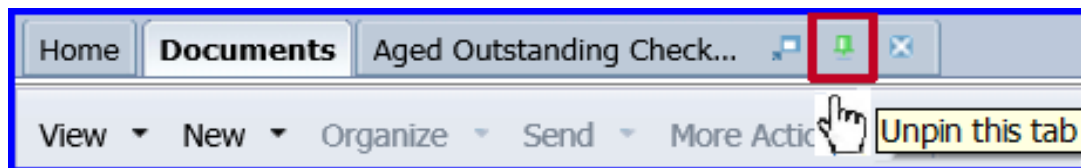


When a document is pinned, the push pin icon will be green & point downward .

Click the 'Open in a new window' icon  to view the document.



Click the push pin icon  to unpin the document. The icon will then be blue & point left .





✧ **Report in WIDE View**

To get the widest view of a report, close the Side Panel.

Click the left pointing double arrowhead icon to do this.

Clicking on any of the Side Icons will reopen the Side Panel.

Side Panel

Side Icons

Close Side Panel
Click to close the Side Panel

Web Intelligence

Input Controls

Map Reset

Plant

- ☐ Select (All)
- ☐ 109A - Coastal Prote
- ☐ 273A - DOTD Admini
- ☐ 275A - DOTD Pub W
- ☒ 276A - DOTD Eng&O

PO Number (Ex. 20...)

OK

Buyer

- ☒ Select (All)
- ☒ ADRIAN STALLONE
- ☒ ALEX ARNOLD
- ☒ ALICE SMITH
- ☒ ALLISON RICHARD

PO Remaining Encu...

All values

OF LOUISIANA

view using ECC Acct

Fiscal Year: 2015
Report Date: 3/4/15

PO Number	Smart Number	Supplier No	Product
Item No	Product Description	Prod Cat No	Product
Item Type	Shopping Ca	Item	Contract
Acct No	Acct Cat	Cost Center	Funds Center
			G/L Account
276A	DOTD Eng&Operations/Agency 276		
#	Not assigned	Not assigned	
A000000041	SiteManager IF	310008895	CITY OF R
0010	RUSTON DOWNTOWN DISTRICT REVIT,	72131700	INFRASTR
	Material	#	#
A000000041	0010 0001 SiteMgr Project	270L000000	5710128
A000000156	SiteManager IF	310009678	COASTAL
0040	"LA HIGHWAY 182 DRAIN CANAL BRID	72131700	INFRASTR
	Material	#	#
0001	SiteMgr Proiect	270TE0S000	5710105

PO Overview using ECC Acct

POs Eligible for Carry Forward

PO Overview using ECC A

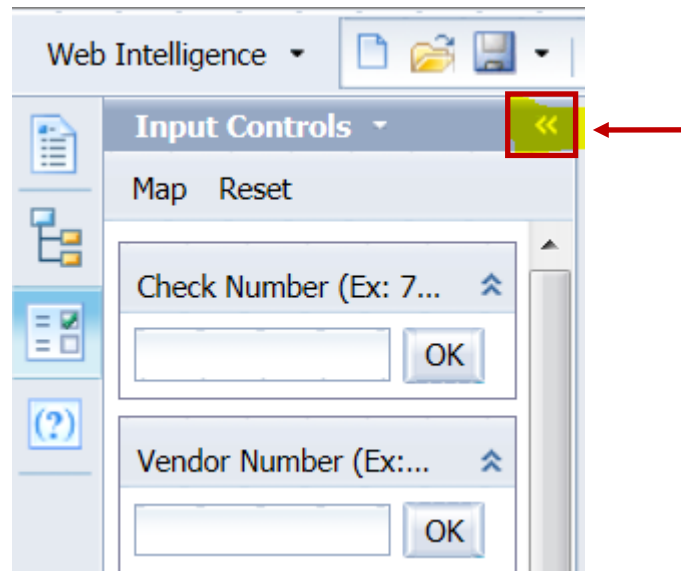
Track changes: Off



✧ Open / Close Side Panel

CLOSE the report panel by clicking the **double arrow**.

Open and Close the side panel is a toggle function. Click on one of the icons to OPEN the panel.
Click on the double arrow to CLOSE the panel.

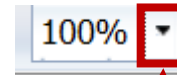


Once the Side Panels is closed, more of the report is displayed.

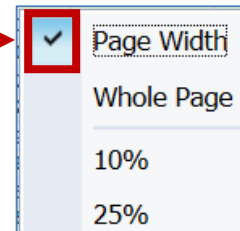
Web Intelligence							
STATE OF LOUISIANA Aged Outstanding Checks							
Report Date: 10/20/14							
Vendor Name	Vendor Number	Check Number	Bus Area	Payment Document	Print/Check Date	Check Amount	Days O/S
ACADIAN ENGINEERS & ENVR CONSUL	310002817	0000000137541	270	2000169168	06/27/2014	\$3,186.50	115
ACADIAN ENGINEERS & ENVR CONSUL	Count of distinct checks:		1	Total Check Amounts:		\$3,186.50	
ASCENSION PARISH	310007154	0000000135620	270	2000166936	06/13/2014	\$4,202.00	129
	310007154	0000000135621	270	2000166937	06/13/2014	\$14,702.00	129
	310007154	0000000135622	270	2000166938	06/13/2014	\$50.00	129
	310007154	0000000137491	270	2000169272	06/27/2014	\$45.00	115
	310007154	0000000137492	270	2000169273	06/27/2014	\$45.00	115
	310007154	0000000137493	270	2000169274	06/27/2014	\$95.00	115
	310007154	0000000137494	270	2000169275	06/27/2014	\$85.00	115
	310007154	0000000137495	270	2000169276	06/27/2014	\$75.00	115
	310007154	0000000137496	270	2000169277	06/27/2014	\$120.00	115
ASCENSION PARISH	Count of distinct checks:		9	Total Check Amounts:		\$19,419.00	



To display the entire WIDTH of the report after closing the Side Panel



Click on the arrow of the ZOOM Tool at the bottom of the report and select Page Width



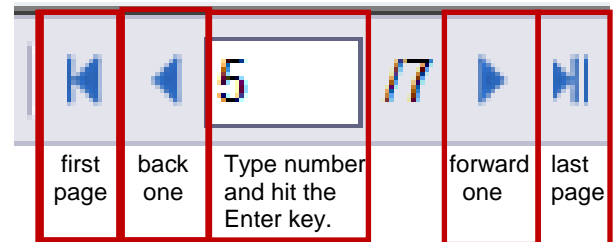
✧ Page through a Webi report

Page through the report using the **Page Navigation tool** located in the lower toolbar, next to the Zoom tool.



Use the page navigation arrows to:

- move to the first page of the report
- move back one page
- move to a specific page in the report
- move forward one page
- move to the last page of the report





INPUT CONTROLS

Overview

Side Panel & Icons

Report Window

Web Intelligence

Input Controls

Map Reset

Check Number (Ex: 71...)

Vendor Number (Ex: 3...)

Vendor Name

Payment Document Nu...

Business Area

Number of Days Outsta...

Report Tabs

STATE OF LOUISIANA
Aged Outstanding Checks

Report Date: 10/20/14

Vendor Name	Vendor Number	Check Number	Bus Area	Payment Document	Print/CI Date
108 WESTERN PROPERTIES LLC	310033294	0000000137768	276	2000169447	06/27/2
108 WESTERN PROPERTIES LLC		Count of distinct checks:	1	Total Check Amc	
310001080	310005620	0000000137854	512	2000169595	10/08/2
310001080		Count of distinct checks:	1	Total Check Amc	
ACADIAN ENGINEERS & ENVR CONSUL	310002817	0000000137541	270	2000169168	06/27/2
ACADIAN ENGINEERS & ENVR CONSUL		Count of distinct checks:	1	Total Check Amc	
ACME GLASS CO OF ALEXANDRIA INC	310003116	0000000025808	276	2000030474	07/26/2
	310003116	0000000027716	276	2000032818	08/09/2
ACME GLASS CO OF ALEXANDRIA INC		Count of distinct checks:	2	Total Check Amc	
ACTIVE STEEL WELDING & REPAIR, INC	STLA1099M	0000000137088	276	2000169030	06/24/2
ACTIVE STEEL WELDING & REPAIR, INC		Count of distinct checks:	1	Total Check Amc	
ALACK REFRIGERATION CO INC	310003985	0000000136172	276	2000167383	06/17/2
ALACK REFRIGERATION CO INC		Count of distinct checks:	1	Total Check Amc	
AMERICAN EXPRESS TRS	310005296	0000000137826	276	2000169515	07/04/2
AMERICAN EXPRESS TRS		Count of distinct checks:	1	Total Check Amc	
AMERICAN KEY & LOCK CO INC	310005433	0000000137195	276	2000168729	06/24/2
AMERICAN KEY & LOCK CO INC		Count of distinct checks:	1	Total Check Amc	
ANDERSON MACHINE & WELDING, INC.	310051984	0000000137014	276	2000168467	06/20/2

Aged Outstanding Checks | Aged O/S Checks (Raw Data) | Quick Tips & Stats

Track changes: Off



The **Input Control icon** is located 3rd from the top in the Side Panel icons.

Input Controls act as **report filters** that narrow the data displayed in a report.

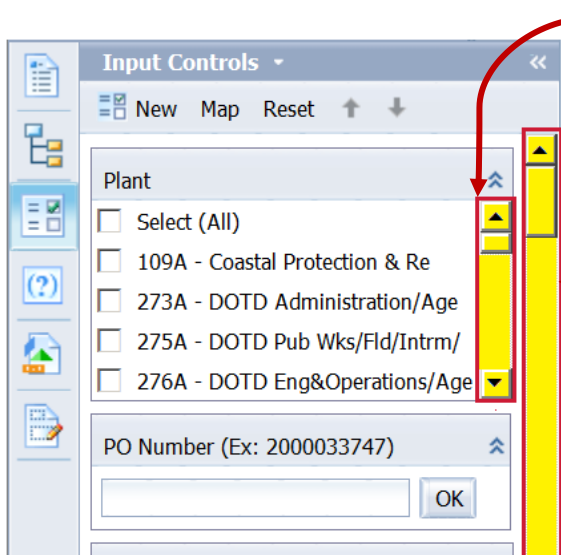


■ Navigate the Input Control Panel

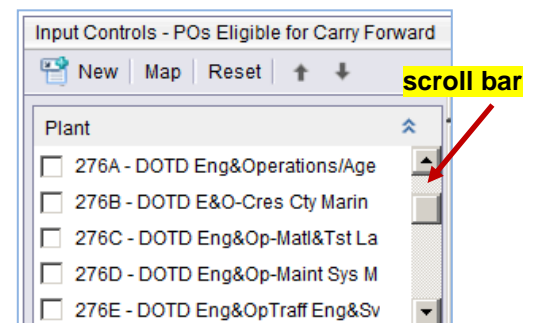
✧ Scroll Bars

Some Input Controls have their own scroll bar

When the **Input Controls** exceed the amount of display space in the side panel, it will have its own **scroll bar** as well.



Use the **scroll wheel** on the mouse, or the **scroll bar** on the Input Control to scroll up and down through the entire list of Input Control values



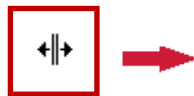
✧ Resize the Side Panel



Mouse anywhere over the
panel's border to display the
floating cursor.



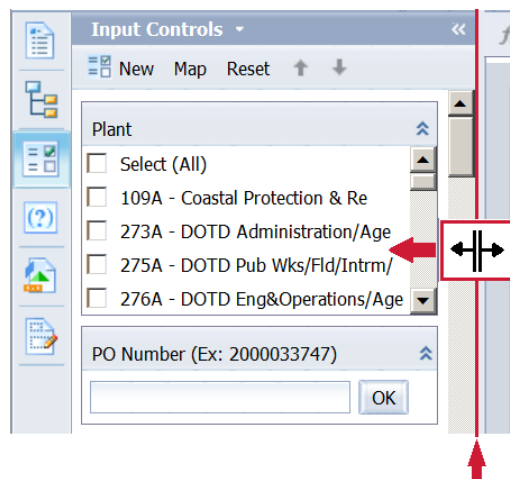
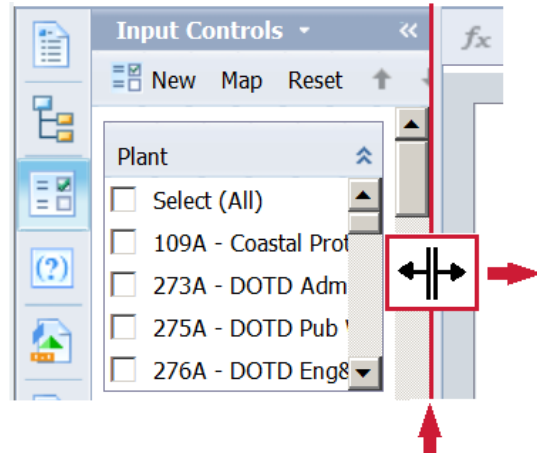
To expand the side panel,
drag the floating cursor right.



To reduce the side panel,
drag the cursor left.



the Input Control descriptions
may not fully display





Input Control Types

✧ Input Control Type – Checkbox

To display ALL DATA in a report,
check the 'Select (All)' checkbox.

A screenshot of a 'Business Area' input control. It features a list of checkboxes. The first checkbox, labeled 'Select (All)', is checked and highlighted in yellow. Below it are four other options, each also checked: '109 - GOV-COAST PROT & RESTOR AUTH', '270 - DEPT TRANSPN & DEVELOP-ADMN', '273 - DOTD ADMINISTRATION', and '274 - PUBLIC IMPROVEMENTS'.

Uncheck 'Select (All)'.

No data will display in the report.

To display specific data,
check one or more values
in the Input Control.

A screenshot of a 'Business Area' input control. The 'Select (All)' checkbox is unchecked. Instead, three specific business areas are selected and highlighted in yellow: '270 - DEPT TRANSPN & DEVELOP-ADMN', '273 - DOTD ADMINISTRATION', and '274 - PUBLIC IMPROVEMENTS'.

As you check each value, if there is
no OK bar, the data displays in the
report. If there is an OK bar, it must
be clicked to filter/display the data.

✧ Input Control Type – List Box

To display ALL DATA in a report,
highlight **All values.**

A screenshot of a dialog box titled 'Input Controls - Aged Outstanding Check'. It has tabs for 'New', 'Map', and 'Reset', along with up and down arrow buttons. The 'Check Number' section contains a list box with 'All values' selected and highlighted in blue. Below it are four numeric values: '000000009883', '0000000012232', '0000000018888', and '0000000024399'. An 'OK' button is to the right. The 'Business Area' section contains a list box with 'All values', '270', '273', '274', and '276'. The '273' and '274' items are highlighted in blue. An 'OK' button is to the right of this list box.

To display specific data, the user must
select one or more values and click OK.

The report will display data for those
specific values only.



✧ Input Control Type – Entry Field

When a report opens and the Entry Field in the Input Control contains a value, it means that the report is probably HUGE, with hundreds of pages.

This is true of the HB2 Capital Budget report.

The report is run wide open, for all data, but is “filtered” for one project number to reduce the number of pages in the report.

In the example to the right, this report was filtered for project – **H.000700**.

Input Controls

New Map Reset ↑ ↓

Project Number (Ex. H.000700) ↑

H.000700 OK

Fund Type ↑

☐ Select (All)

☐ 1 - Operating

☐ 2 - Operating

☐ 4 - Operating

☐ 5 - Operating

To display ALL DATA in a report, the user must **delete the data in the Entry Field** and **click OK**. In this example, all projects will display.

Be careful not to PRINT all those pages ☺

Project Number (Ex. H.000700) ↑

OK

To use an Entry Field input control, the user must **type the value exactly as shown in the example text (Ex: xxxx) and click OK**.

This example is from the Shopping Cart Items Awaiting Approver report.

SC Number (Ex: 1000027835) ↑

100005367 OK



FILTER A WEBI REPORT

Filter using Input Controls in “*Reading Mode*”

With the Webi report in **Reading Mode**, the easiest way to filter is by using the Input Controls.

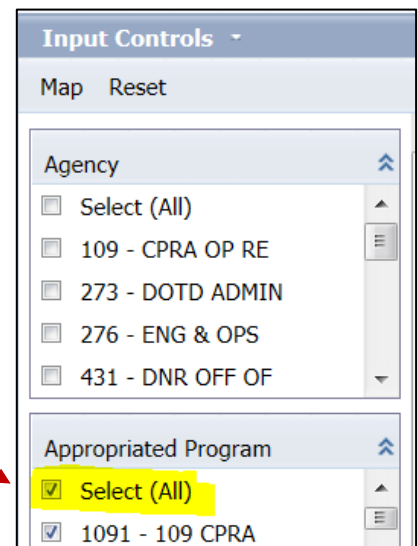
1. Open an HB1: Budget vs Actual report
Finance > Budget Reports
HB1: Budget vs Actual by AGY >AP> CI>FC



2. Notice that this report opens with NO data displayed even though ALL of the Appropriated Programs are selected.

This is because there is NO agency selected:

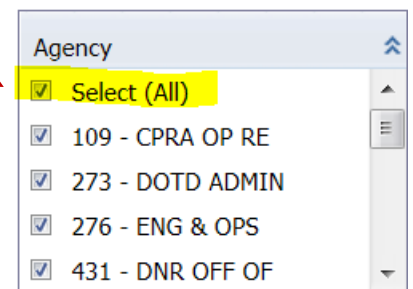
☐ **Select All**



3. Click ☒ **Select All** in the **Agency** input control.

Notice that this report is now populated with data for all of the agencies listed.

4. Scroll through the remainder of the input controls on this report. Notice that all values have been selected in the remainder of the input controls.



5. Also notice that for each Agency, ALL of the CI Categories are currently displayed on this report.



6. Let's filter for "only" CI Category 540 – Total Supplies
Uncheck ☐ Select All in the CI Category input control.
7. Scroll down through the CI Category input control until you see the value **540 – Total Supplies**
8. Select ☒ **540 – Total Supplies**
(Please note that multiple values can be selected.)
9. Now page through the report and notice that for ALL of the agencies, **CI Category 540 – Total Supplies** is the only CI Category that displays.

CI Category

☐ Select (All)

☐ 511 - TOTAL SALARIES

☐ 512 - TOTAL OTHER COM

☐ 513 - TOTAL RELATED BE

☐ 520 - TOTAL TRAVEL

CI Category

☐ 520 - TOTAL TRAVEL

☐ 530 - TOTAL OPERATING

☒ **540 - TOTAL SUPPLIES**

☐ 550 - TOTAL PROF SERVI

☐ 560 - TOTAL OTHER CHAI

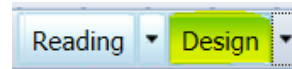
STATE OF LOUISIANA						
HB1: Budget vs Actual by AGENCY > APPR PRGM > CI CATG > FUNDS CENTER						
For Period / Fiscal Year: 00 2015 To SP4 2015						
Report Date: 10/20/14						
AGY	APPR PRGM	CI CATG	FUNDS CENTER	COMM ITEM	COMM ITEM NAME	BUDGET
109	109 CPRA OP REV					
	1091	109 CPRA				
		540	TOTAL SUPPLIES			
			1091000000	109 COASTAL PROTECT & RESTORATION AUTH --- TOTAL		0.00
			1091010000	IMPLEMENTATION --- TOTAL		2,157,685.00
			1091011000	EXECUTIVE --- TOTAL		0.00
			1091012000	PROJECT MANAGEMENT DIVISION --- TOTAL		0.00
			1091014000	OPERATIONS DIVISION --- TOTAL		0.00
		540	TOTAL SUPPLIES --- TOTAL			2,157,685.00
	1091	109 CPRA --- TOTAL				2,157,685.00
109	109 CPRA OP REV --- TOTAL					2,157,685.00
273	273 DOTD ADMIN					
	2731	273 DOTD SECRETARY				
		540	TOTAL SUPPLIES			
			2731000000	273 DOTD ADMIN OFFICE OF THE SECRETARY --- TOTAL		24,067.00
			2731010100	01 SECRETARYS OFC ADMINISTRATION --- TOTAL		0.00
		540	TOTAL SUPPLIES --- TOTAL			24,067.00
	2731	273 DOTD SECRETARY --- TOTAL				24,067.00
	2732	273 DOTD MGMT & FIN				
		540	TOTAL SUPPLIES			
			2732000000	273 DOTD ADMIN MANAGEMENT & FINANCE --- TOTAL		415,054.00
			2732021000	10 UNDERSECRETARYS OFFICE --- TOTAL		0.00
			2732AAAAAA	273 DOTD ADMIN MGMT & FINANCE INBOUND --- TOTAL		0.00
		540	TOTAL SUPPLIES --- TOTAL			415,054.00
	2732	273 DOTD MGMT & FIN --- TOTAL				415,054.00



▪ Filter a column of data in “*Design Mode*”

1. Open an HB1: Budget vs Actual report
Finance > Funds Management > Budget Reports
HB1: Budget vs Actual by AGY >AP> CAT >FC

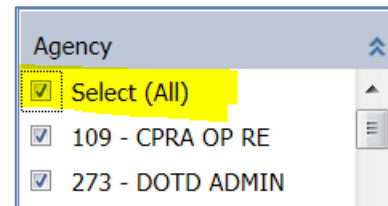
- 2.
3. Click on **Design** mode icon on upper right of the Webi toolbar.



4. The report open with no data displaying.

Click ☒ **Select (All)** in the Agency input control.

The report is now populated with data.



5. Right-click inside the **CI CATG** column of data in the report. (Do not click on the header cell.) .

AGY	APPR PRGM	CI CATG
109	109 CPRA OP RE	
	1091	109 CPR
		511

6. Select a cell that populates the **Formula (fx)** toolbar, at the top of the report, with the technical name of the object. This will ensure that you are filtering on the correct object.



7. When you right-click on a data filled cell, a menu pops up. Scroll down, and slide your cursor over **Filter**, the **Add Filter** option appears.

8. Click on Add Filter.





9. A **Filter** dialog box opens.

Note the name of the column selected: L01 **COMM. ITEM CATEGORY** Key
Click the **Operator's** drop down arrow to display the list of operators.
The operator **In List** has already defaulted.

Object in data cell

List of formula operators

In List selected by default

Report Filter

>> Filter On Block Budget vs Actual

Add Filter

L01 COMM. ITEM CATEGORY Key In List

Equal to

Not Equal to

Greater than

Greater than or Equal to

Less than

Less than or Equal to

Between

Not Between

In List

Not In List

Is Null

Is not Null

Type values here

L01 COMM. ITEM CATEG...

511

512

513

520

530

540

550

560

570

580

L01 COMM. ITEM CATEGORY Key In List

>

<

OK

Cancel

Apply

10. The left pane contains the list of values.

11. Hold the CTRL key and click several of the values:
512...520...540...560

Type values here

L01 COMM. ITEM CATEG...

511

512

513

520

530

540

550

560

570

580

>

<

12. Click the right arrow to move the selected values to the right panel of the Filter box.

L01 COMM. ITEM

>

<

512

520

540

560

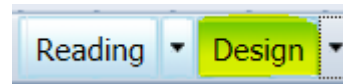
13. Click **OK** to confirm your filter selections.

14. Page through the report and note that it now displays only those CI Categories selected for each of the agencies displayed.



✧ Edit a filter in “**Design Mode**”

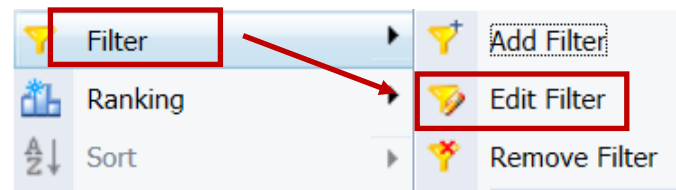
1. Make certain you are still in Design mode.



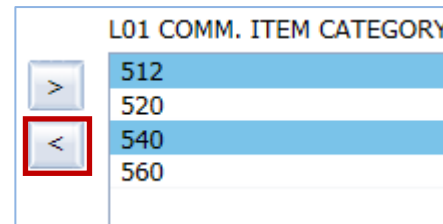
2. To edit an existing filter, right-click again inside a data cell under the CI CATG column heading.
(Do not click on the header cell.)

AGY	APPR PRGM	CI CATG
109	109 CPRA OP RE	
	1091	109 CPR
		511

3. When the menu pops up, select **Filter > Edit Filter**.
The Report Filter box opens.



4. Hold the CTRL key and select values 512 and 540 in the right pane.



5. Remove these values from the selection box by clicking on the left arrow.

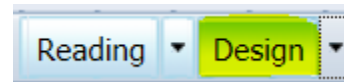
6. Click OK to confirm your selection.

7. Review the report and note that CI CATG 512 and 540 no longer display in the report since they have been removed from the filter.



✧ Remove a filter in “*Design Mode*”

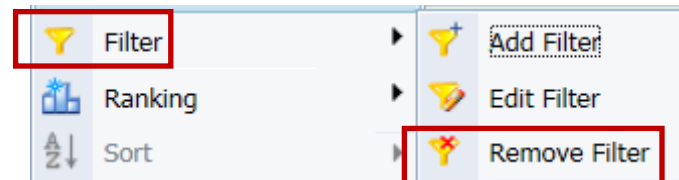
1. Make certain you are still in **Design** mode.



2. To remove this filter and restore all of the CI Categories to this report ...
3. Right-click again inside a CI CATG data cell.
(Do not click on the header cell.)

AGY	APPR PRGM	CI CATG
109	109 CPRA OP RE	
	1091	109 CPR.
		511

4. Select Filter > Remove Filter
5. This action removes (clears) the filter and restores all of the values to the report.




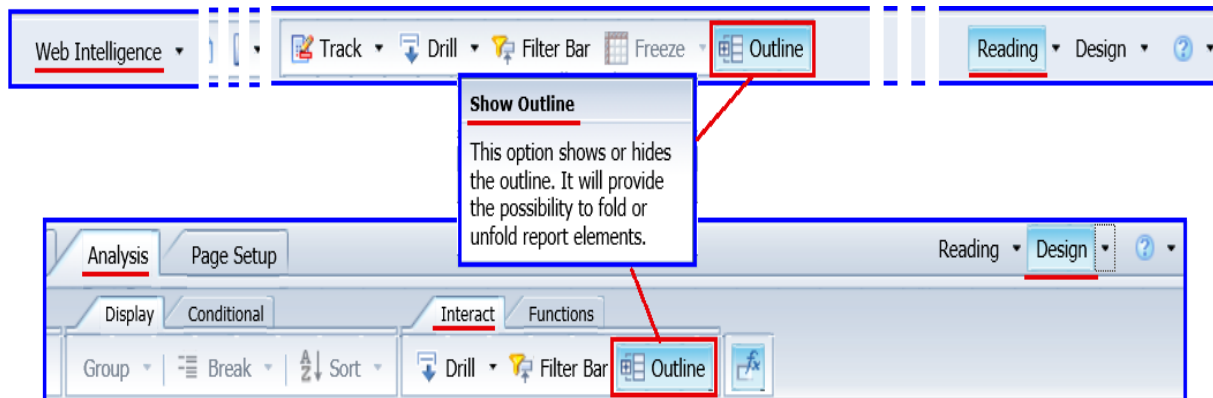


OUTLINE VIEW: FOLD-UNFOLD REPORT DATA *

Fold-Unfold is a toggle function used to expand and collapse data in the report body.

1. **Unfold** => to display more **detailed** data in the report body
2. **Fold** => to hide the details and display **summarized** data in the report body

The **Fold-Unfold** function is available in both **Reading** and **Design** modes, but the **Show Outline** icon  must be active/highlighted.



**Fold-Unfold
Tool Bar**

The screenshot shows the report body with a table of data. On the left side of the report header, there is a 'Fold-Unfold Tool Bar' with a red box around it. The table has the following data:

PO Number	Smart Number
Item No	Product Descript
Item Type	Shop
Acct No	Acct Cat
109A	Coastal Protection & Restoratn
90000046	HILARY STEPHENSON
2000078598	Caernarvon O&M
0001	DIVERSION STRUCTURE M
	Material

Click in Report Header
to **CLOSE** Tool Bar

Click in Report Body
to **OPEN** Tool Bar



- Click on **Logistics** tab.
- Click on **eProcurement** folder.
- Select the **PO Overview ECC** report.
- Close the Detailed Navigation Panel.
- Notice the report opens with no data displayed ... this can be a very large report.
- Go to the **Plant** input control and select **109A – Coastal Protection**.
- This PO report opens with all data fully expanded.



Click on any cell in the report body (not the header).

The Outline View: **Fold-Unfold** toolbar opens on left side of the report, gray columns with small triangles. (If the gray columns do not display, click again on the **Outline** icon.)

STATE OF LOUISIANA
PO Overview using ECC Acct
Fiscal Year: 2015
Report Date: 10/18/14

PO Number	Smart Number
Item No	Product Description
Item Type	Shopping
Acct No	Acct Cat
109A	Coastal Protection & Restoratn
#	Not assigned
2999999994	#
0010	TEST
	Material #
2999999994	0010 0001 Project
2999999995	#
0010	TEST
	Material #
2999999995	0010 0001 Project
90001105	RAYMOND MCKNIGHT
2000076286	Local Purchase Order1 P00210173 09
0001	TEST
	Material 1000052
2000076286	0001 0001 Order

T 1 2 3 4 5

PO Overview using ECC Acct POs Eligible for Carry Forward



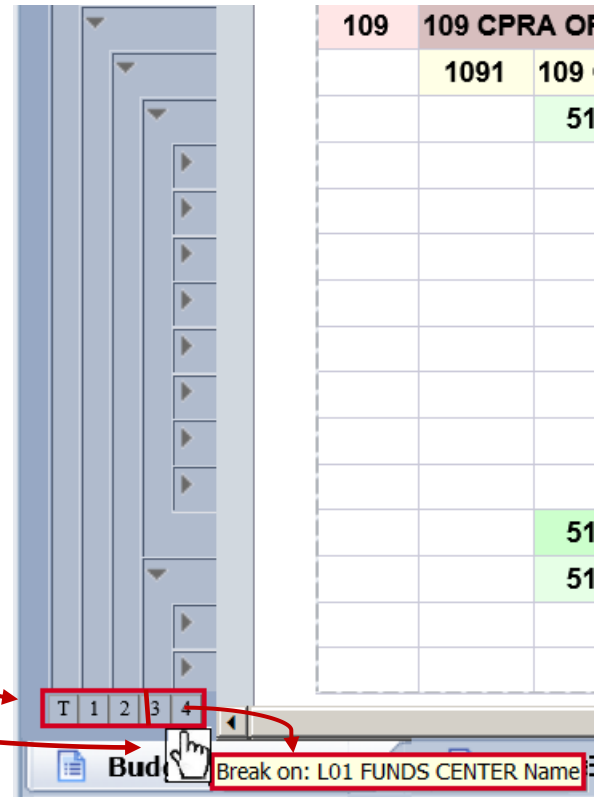
The **Fold-Unfold toolbar** is controlled by the numbered boxes at the bottom of the gray column.

The numbers correspond to the data elements (objects) that expand and collapse.



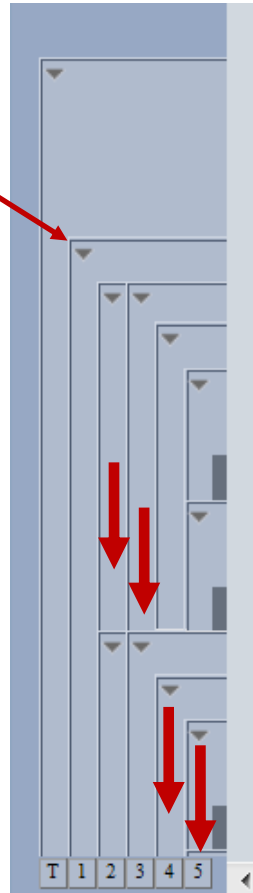
Scrolling the cursor over a number indicates with data element is referenced.

Clicking the numbers ***in sequence*** is the most fool-proof way to **Fold-Unfold** the data.





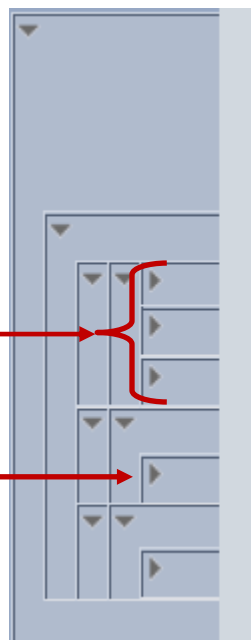
1. A **downward triangle** indicates the data for that column is **unfolded**.
2. In this report, all the data is unfolded.
3. All arrows are pointed downward.
4. Click on # 5.
5. Click on #4. The data on this report is being folded up.
6. See the image below.



Report Date: 10/18/14

PO Number	Item No	Item Type	Acct No
273A	DOTD Administratio		
90000054	HEATHER THODE		
2000076133	OSP change		
	0001	SAILBOAT	
		Material	
	0001	0001	
2000076133	0002	SPINNAKER	
		Material	
	0002	0001	
90000075	ERICA HANCOCK		
2000076120	P00222010 07/21/20		
	0001	FOOTWEAR:	
		Material	
	0001	0001	

7. **Right-pointing triangles** indicate that data has been collapsed.
8. This data has been folded on Level 4 – up to the Purchase Order number level.
9. All the Data is summarized at this level.
10. Line Item No and Accounting Line No are folded up (collapsed).
- 11.



PO Number	Item No	Item Type	Acct No
276A	DOTD Eng&Operatio		
2000050283	SIO 30000133 10-1B		
2000050285	SIO 30000133 10-1B		
2000052221	SIO 30001505 12-4E		
90000203	JOANN KURTS		
2000076001	P00031007 07/02/201		
90001127	LAWRENCE HAMM		
2000058742	H.005288.5 - CLAIMS		
Grand Total:			



PRINT A WEBI REPORT TO PDF

Webi converts reports to Adobe PDF format to print them. Below is an example.

1. Open *Finance* tab. In the *Detailed Navigation Pane*, open the *> Accounts Payable folder>* open the *Aged Outstanding Checks* report.
2. Check to be sure you are in *Reading* mode.

*This report contains data on all agencies, and can be very large, so you may want to select only your **Business Area** in the input controls.*

3. Uncheck ☐ *Select (All)* and select ☒ *270 – DEPT TRANSPORTN & DEV ADMN*
4. We **strongly** discourage using the **Print** icon, as **it will print the entire document (ALL report tabs)**, not just the report tab you are viewing (unless you specify a range of pages).

5. Click on the **Export** icon.
*If you leave the **default setting** the **entire Webi** document will be exported and printed (**all** report tabs).*
6. Confirm that **File Types** is set to **PDF**.
7. So that **only the report tab you have open** will be exported and printed, select the **Current Report** option.
8. Click **OK**.

- If this is the first time you attempt to print to PDF, you may receive pop-up blocker message at the top of your window.
- Click on the pop-up blocker to clear it.
- This will kick you all the way out of the report. You must work your way back to the report.
- Repeat the steps above beginning with #1.
- This should occur **only** the first time you attempt to print a report.

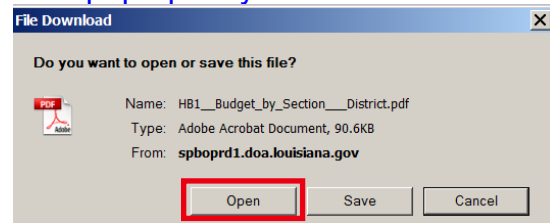


9. The File Download box displays and asks: **Do you want to open or save this file?**

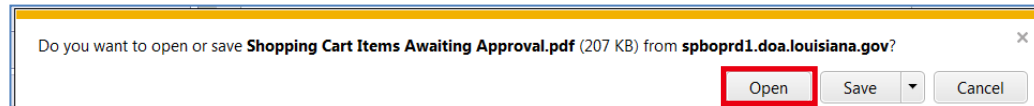
NOTE: The pop-up's appearance may vary with different Web browsers.

10. Click **Open** to view the report in PDF.

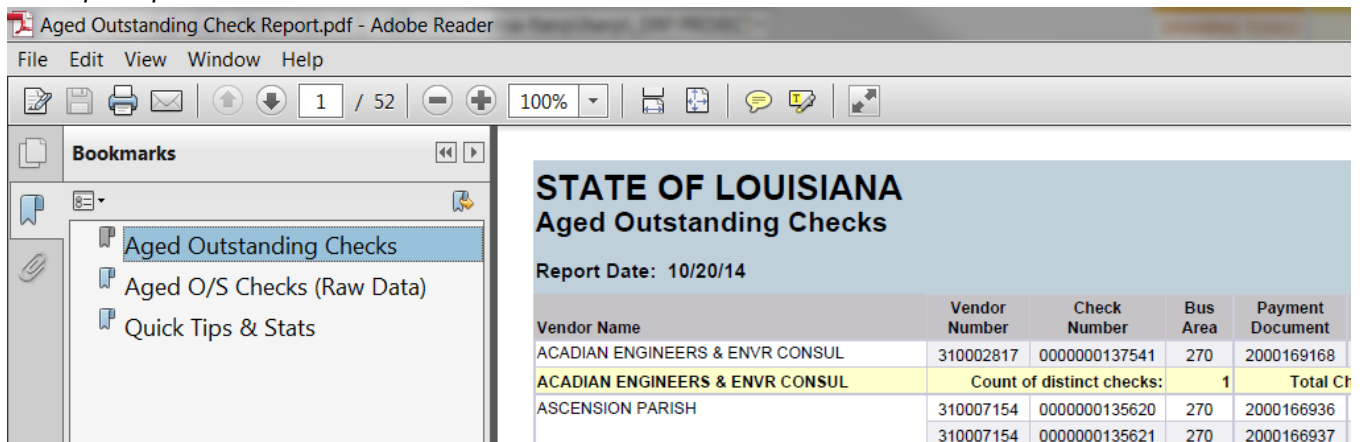
Your pop-up may look like this...



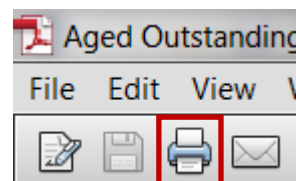
... or your pop-up may look like this...



11. The report opens in **Adobe PDF** format.

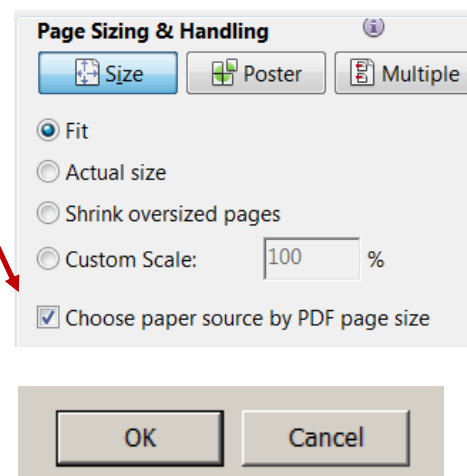


12. Click the **Print** icon in the upper left and select your Print options.



13. Under Page Sizing & Handling section, make certain you select:
☒ Choose paper source by PDF page size

This will automatically select Letter or Legal paper according to the page size selected for the report.



14. Click **OK** to print the report
- 12.



SAVE A WEBI REPORT

*Webi reports can be saved in PDF format to a local drive.
Follow the steps above for printing a Webi report.*

*When the dialog box opens, select SAVE
and choose the directory in which to
store your report.*





DOWNLOAD A WEBI REPORT TO EXCEL

Webi reports can be converted to spreadsheet format to print them. Below is an example.

1. Click on the **Finance** tab > **Accounts Payable** folder.
Open the **Aged Outstanding Check** report.
2. Look at your report tabs. Do you have a report tab titled: **RAW DATA** ?




Raw Data report tabs are created for purpose of downloading report data to a spreadsheet format.

3. Click on the **Raw Data** report tab.
4. Use the Input Controls to filter the data you want to include.

5. Click on the **Export** icon.
If you leave the **default settings** the **entire** Webi document will be exported and printed (**all** report tabs).

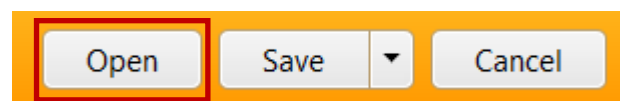
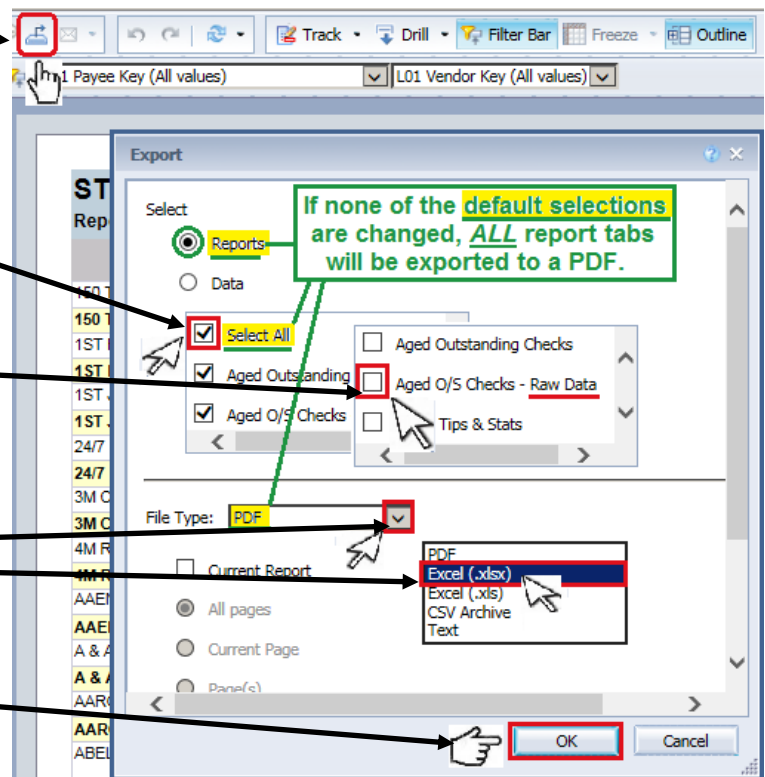
6. Click on the check mark in the selection box for "**Select All**", to de-select it

7. Click in the empty check box of the Raw Data tab. (Use the vertical scroll bar to navigate down to it)

8. In the File Type selection box, click the  icon and select **Excel (.xlsx)** from the drop-down menu of options.

9. Click **OK**.

10. Select **OPEN**.
The report will open in Excel.





11. The excel spreadsheet opens and includes all report data from that report tab.

	A	B	C	D	E	F	G	H	I	J	K
	Vendor Name		Vendor Number	Bus Area	Check Number	Check Numb	Payment Doc	Payment Date	Check Amount	Days O/S	Days O/S Range
2	108 WESTERN PROPERTIES LLC		310033294	276	0000000137768	137768	2000169447	06/27/2014	\$259.38	115	91 to 180 days
3	310001080		310005620	512	0000000137854	137854	2000169595	10/08/2014	\$5.00	12	0 to 30 days
4	ACADIAN ENGINEERS & ENVR CONSUL		310002817	270	0000000137541	137541	2000169168	06/27/2014	\$3,186.50	115	91 to 180 days
5	ACME GLASS CO OF ALEXANDRIA INC		310003116	276	0000000025808	25808	2000030474	07/26/2011	\$468.88	1182	Over 180 days
6	ACME GLASS CO OF ALEXANDRIA INC		310003116	276	0000000027716	27716	2000032818	08/09/2011	\$205.13	1168	Over 180 days
7	ACTIVE STEEL WELDING & REPAIR, INC		STLA1099M	276	0000000137088	137088	2000169030	06/24/2014	\$1,000.00	118	91 to 180 days
8	ALACK REFRIGERATION CO INC		310003985	276	0000000136172	136172	2000167383	06/17/2014	\$1,230.00	125	91 to 180 days
9	AMERICAN EXPRESS TRS		310005296	276	0000000137826	137826	2000169515	07/04/2014	\$5,924.86	108	91 to 180 days
10	AMERICAN KEY & LOCK CO INC		310005433	276	0000000137195	137195	2000168729	06/24/2014	\$10.85	118	91 to 180 days
11	ANDERSON MACHINE & WELDING, INC.		310051984	276	0000000137014	137014	2000168467	06/20/2014	\$80.71	122	91 to 180 days
12	ANTOINE LALONDE		310006317	276	0000000137215	137215	2000168771	06/24/2014	\$9,261.00	118	91 to 180 days
13	ARROW EQUIPMENT & REPAIR INC		310006974	276	0000000137623	137623	2000169267	06/27/2014	\$1,202.65	115	91 to 180 days
14	ASCENSION PARISH		310007154	270	0000000135620	135620	2000166936	06/13/2014	\$4,202.00	129	91 to 180 days
15	ASCENSION PARISH		310007154	270	0000000135621	135621	2000166937	06/13/2014	\$14,702.00	129	91 to 180 days

12. The spreadhseet can now be manipulated and saved as needed.

NOTE: It's important to remember that the data in this spreadsheet is only as current as the date and time it was exported. You may want to include the date in the file.



VIEW PREVIOUS VERSIONS OF A REPORT

“Instances” or copies of some Financial and Budget reports are kept in a History file for 45 days. This allows users to refer back to a previous copy of a report “within” the 30-day period.

Previous instances of reports are stored in InfoView.

The **Launchpad (InfoView)** tab is located all the way to the right. Click on it.



All agency reports are located in Public Folders.

The Launchpad’s directory structure replicates the directory structure in the portal.

To view a previous instance of a report, drill down the directory folders until your report is reached.

Click the **+** sign to open the various levels of reports in the InfoView Directory.

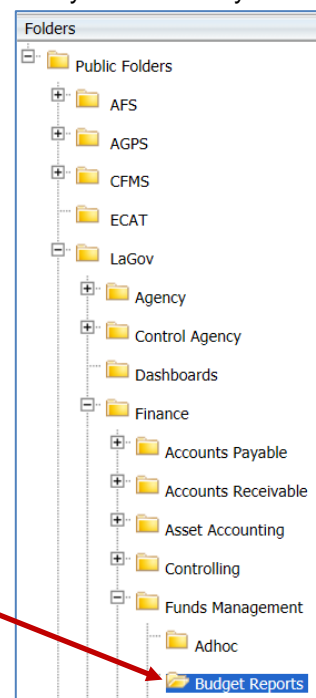
+ Public Folders

+ LaGov Reports

+ Finance

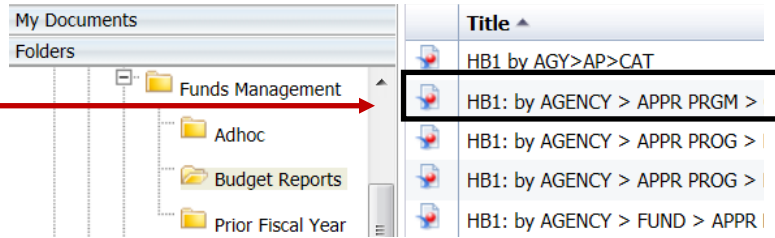
+ Funds Management

+ Budget Reports

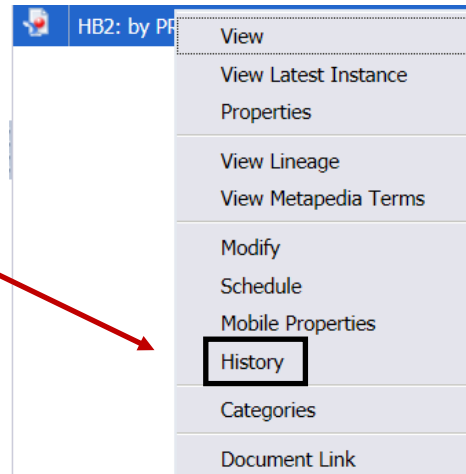




- Right-click on the report title of the report you want to view.



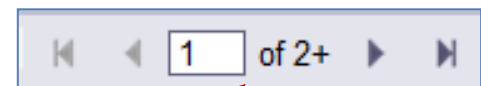
- Click on **History** in the drop down menu.
-
-
-
-
-
- LaGov is maintaining a **History** of 40 days on this Budget Report so users can access previous reports for a prior month.
-



-
-
-
- Instance Time = Version Date & Time
-
- Click on the **DATE** link of the version you want to view
-

History – HB1: by AGENCY > APPR PRGM > CI CATG > FUNDS CTR		
View ▾ Organize ▾ Send ▾ More Actions ▾		
Instance Time ▾	Title	
Oct 22, 2014 5:59 PM	HB1: by AGENCY > APPR PRGM > CI	
Oct 20, 2014 3:31 PM	HB1: by AGENCY > APPR PRGM > CI	
Oct 18, 2014 2:59 PM	HB1: by AGENCY > APPR PRGM > CI	
Oct 11, 2014 2:59 PM	HB1: by AGENCY > APPR PRGM > CI	

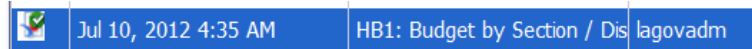
-
- Note the **Page Navigation** tool at the right of the toolbar. The window only displays 10 report instances at a time.
-
- You must page through the windows if you want to see the earliest report instances maintained.





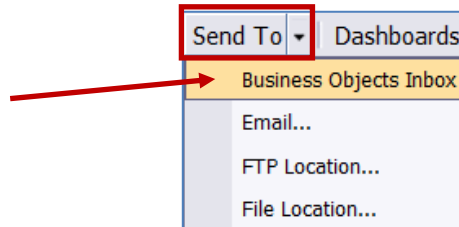
SEND A REPORT TO ANOTHER USER

- Select the report you want to send by highlighting it.

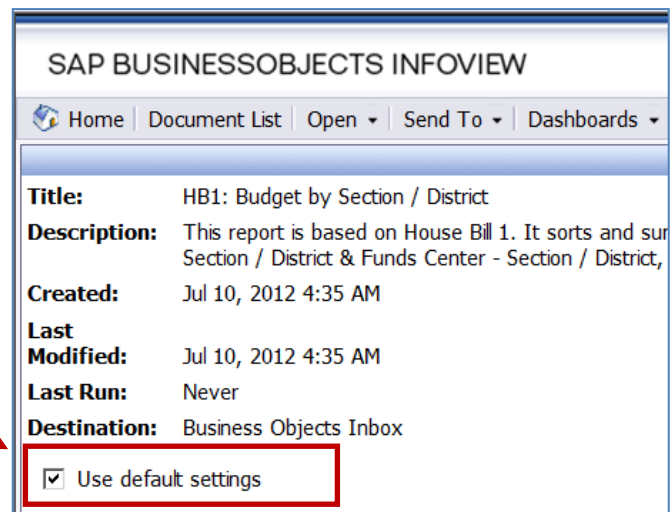


Hint: Click on the report title and not the date

- Click the **Send To** arrow at the top of the **InfoView** toolbar and select **Business Objects Inbox**.



- The **Send To** window opens.



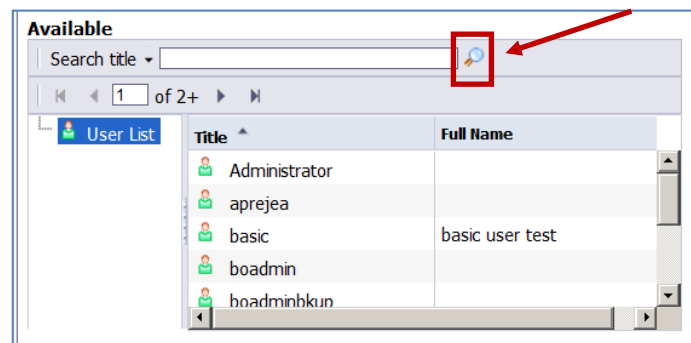
- After a second, the **Use default settings** option appears.

- Uncheck** this option to display further options. Scroll down to see remainder of the screen.

- You must know a user's Personnel Number (PID) in order to send them a report.

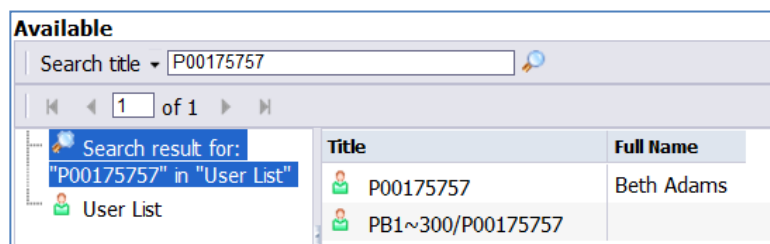
- Type the user's **P-number** into the **Search Title** field and click **Search** (magnifying glass).

You can type a partial string of numbers and still get results.



- Typing **"175757"** returns:

- LaGov User IDs begin with:
PB1~300/P_____
(production id)





- Click on the User's **PB1 id** and move it to the **Selected** box on the right.

Available

Search title 175757

1 of 1

Search result for: "175757" in "User List"

User List

Title	Full Name
P00175757	Beth Adams
PB1~300/P00175757	

Selected

1 of 1

Title

PB1~300/P00175757

- The default settings are set to:
Target Name:

Send As:

Target Name:

☒ Use Automatically Generated Name

☐ Use Specific Name

Send As:

☐ Shortcut

☒ Copy

- Click the **Submit** button at the bottom right of the window to **SEND** the report to the user.

Submit Cancel

- The user can access this report by opening the **InBox** on the **InfoView Home Page**.

SAP BUSINESSOBJECTS INFOVIEW

Home Document List Open Send To Dashboards

New Add Organize Actions

All

- My Favorites
- Inbox**
- Public Folders
- My Groups

Title
HB1: Budget by Section / District



✧ **HINTS on the SEND TO function:**

- **To delete a P-number:**

You must click inside the **Search title field** at the end of the character string and **DELETE** the characters using the **Backspace key**.

Available
Search title ▾ 5757

- After entering a new P-number, you must select **User List**, then **Search**.

Available
Search title ▾ 158901

1 of 2+

Search result for:
"175757" in "User List"

User List

Title
Administrator
aprejea

- You can send to multiple users by selecting and moving them to the Selected box.

Available

Search title ▾ 158901

1 of 1

Search result for:
"158901" in
"User List"

User List

Title	Full Name
P00158901	Andre Prejean
PB1~300/P00158901	

Selected

1 of 1

Title

- PB1~300/P00158901
- PB1~300/P00175757



DATA WAREHOUSE HELP

There are several types of HELP documents located on the LaGov website.

In the Data Warehouse, click “Help” and then “Open online help” to display links to various help documents.

The screenshot displays the LaGov Data Warehouse web application. The top navigation bar includes the LaGov ERP logo and the text "Data Warehouse". Below this, a secondary navigation bar contains links for "Back", "Forward", "History", "Favorites", "Personal", "Help", and "Log". The "Help" link is highlighted with a red box and a red arrow labeled "1". Below the "Help" link, a dropdown menu is visible, with the "Open online help" option highlighted by a red box and a red arrow labeled "2".

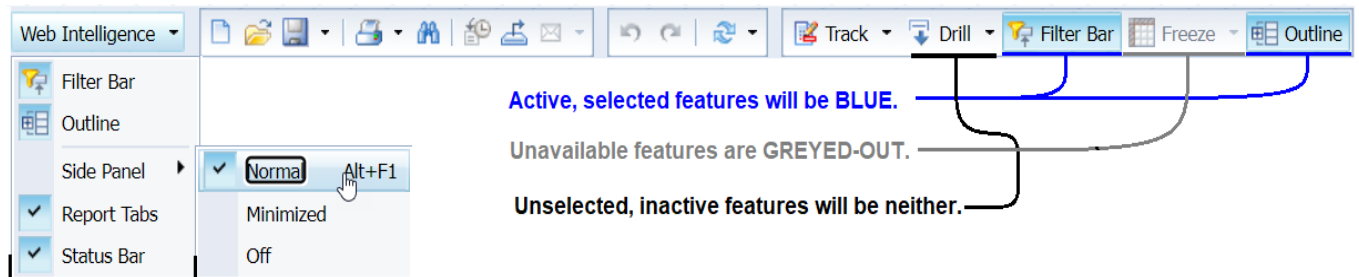
The main content area is divided into two columns. The left column, titled "Actions", contains a "Language (en_US)" link. The right column, titled "Help Content", contains a list of links to various help documents, including:

- * List of Data Warehouse Reports
- Data Warehouse Training Videos
- DOTD FAID Legacy System
- How To - Change Universes for a Webi Report
- How To - Create a Prompt Variant
- How To - Create a Webi Report From an Excel Spreadsheet
- How To - Navigate a Crystal Report
- How To - Navigate a Webi Report
- How To - Schedule a Report
- How To - Send a Report to Another User
- ISIS BO Help Documents
- SAP-BO Documents











APPENDIX




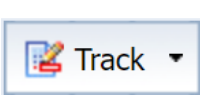
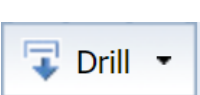
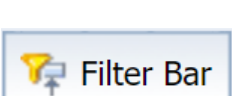
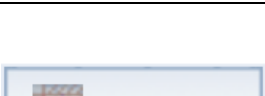
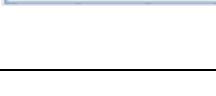
■ Webi Default Toolbar



Tool Bar Display Options

	New (Ctrl+N) New
	Open (Ctrl+O) Open a document
	Save Menu (Ctrl+S) Click the button to save the document, or the arrow for more save options.
	Print (Ctrl+P) Export to PDF for printing
	Find (Ctrl+F) Find text in tables and cells on this page
	History List of dates corresponding to the instances of the scheduled document.
	Export Export to my computer in PDF, Excel or CSV format
	Send to Send to Mail, Inbox...

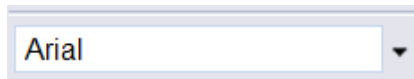


	Undo (Ctrl+Z) Undo previous actions
	Redo (Ctrl+Y) Redo previous actions
	Refresh Refresh one or all data providers
	Track Activate or deactivate data tracking mode
	Drill Navigate the report by hierarchy
	Filter Bar Click here to show or hide Report Filter toolbar
	Freeze Headers Keep the header or a portion of the table visible while the rest of the table scrolls.
	Show Outline This option shows or hides the outline. It will provide the possibility to fold or unfold report elements.



▪ Webi Formatting Toolbar

These features work in the same way as the formatting toolbar in MS WORD.



Font Name



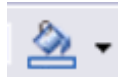
Font Size



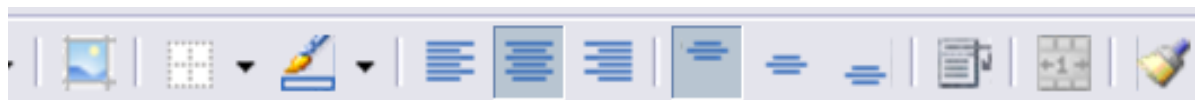
Bold – Italic – Underline



Font Color



Cell Background Color



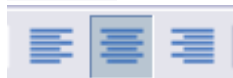
Background Image



Border Style



Border Color



Horizontal Text Alignment



Vertical Text Alignment



Wrap Text



Merge or Split Cells



Format Painter



■ Webi Report Toolbar



Alert
Highlight results that meet or fail specific business targets



Sort
Sort data in ascending, descending or custom order



Filter
Add, remove or edit a report filter



Break
Insert a break to 'group results' on a table



Calculations
Add or remove calculations



Insert row or column



Remove row or column



Duplicate table or chart



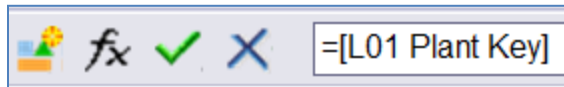
Order
Bring to Front, Send to Back, Bring Forward, Send Backward



Align cells and blocks



▪ **Webi Report Toolbar ... (continued)**



Create a variable (named formula)



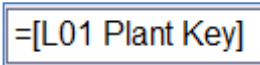
Formula Editor



Validate Formula



Cancel Formula



Modify Formula