

**Lawson Business Intelligence
(Lawson-LBI)
User Guide**

“CMH Dashboard”

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Contact List

End User Access	Help Desk X3445
Report Access	Help Desk X3445
Report Content	Finance (see below)

<u>Report Type</u>	<u>Contact</u>	<u>Extension</u>
Grants/Funds	Melissa Gentile	x 137-4509
Philanthropy/Funds	Mary Pelican	x 6389
Operations Dept/Stats	Darlene Michalek	x 137-4508
Capital Reports	Doris Concepcion	x 137-4117

Launching LBI

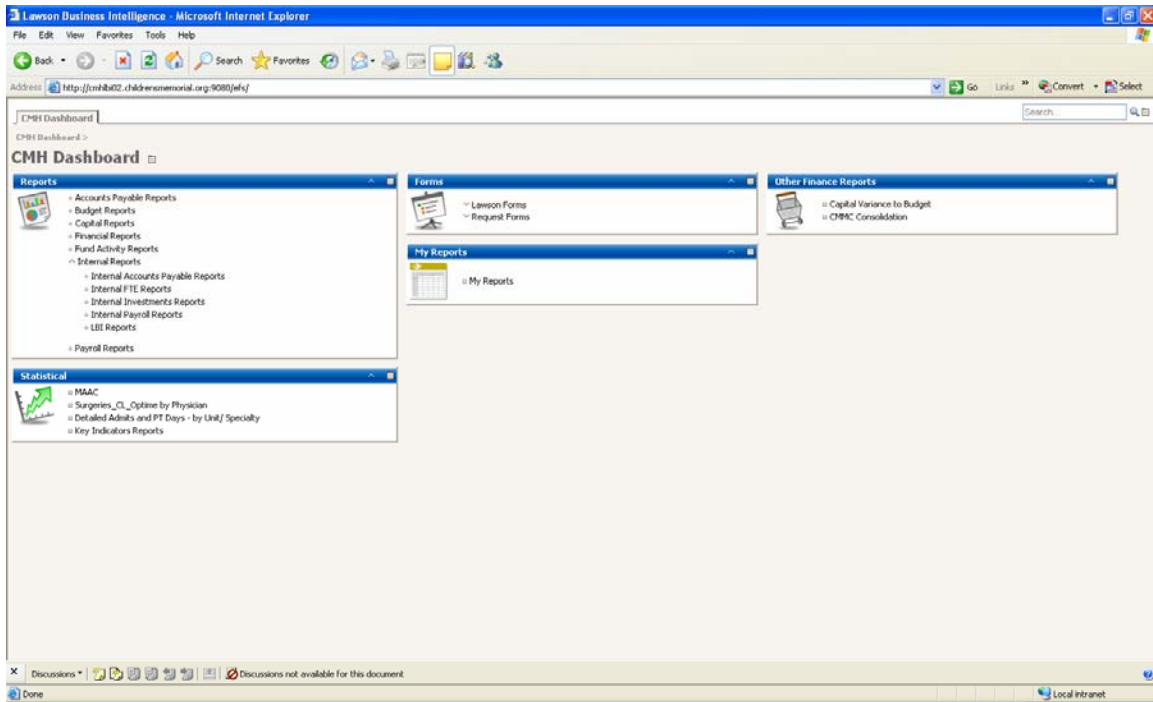
As of 3/16/09, all end users will have an icon called [Lawson - LBI](#)

The screenshot displays the Children's Memorial Hospital intranet portal. The browser window title is "Children's Memorial Hospital - Microsoft Internet Explorer". The address bar shows "http://portal2/default.aspx". The page features a navigation bar with tabs for "Your Professional Development", "Your Pay and Performance", "Your Financial Security", "Your Health", "Your Time Your Life", and "Your Work Resources". Below the navigation bar, there are sections for "Welcome DConcept", "My Home", "My Department", "My Team", "My Resources", and "My Site Help". The main content area is divided into "High Priority Messages" and "Daily Global Information". The "High Priority Messages" section includes a "Deadline for daily submissions is 12 noon" and a message about "IT / Telecommunication System Maintenance Planned for Sunday, March 1st 2009". The "Daily Global Information" section lists various events and news items. On the right side, there are "Quick References" and a "Business Applications" section with a grid of icons for various systems, including "Lawson - LBI-Test" and "Lawson LID". The bottom of the page shows a taskbar with a "Local intranet" icon.

- Click on the [Lawson - LBI](#) Link to accessing all LBI Reports

LAWSON - LBI

You will be directed to the CMH Dashboard that will allow you to see only the items you have access to.



To View Reports

1. To view Reports, click on the appropriate Link in this case Accounts Payable Reports

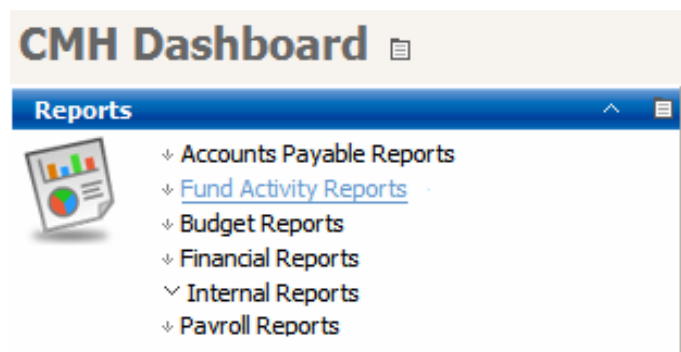


2. The reports that you have access to will appear in the LIST (see below)

Close

1 - 1 of 1

Report Name	Description	Report Type	Report Id
APDistrib [History]		RPT	21



To View Reports

3. To view the latest instance of the report, Click on the Name of the Report

Close

1 - 4 of 4

Report Name	Description	Report Type	Report Id
AC256 Fund Detail EBC [History]	AC256 Fund Detail EBC	RPT	68
Funds AP Detail EBC [History]	Displays Funds for Accounts Payable Detail	RPT	75
Grant Budget Report for EBC [History]	Grant Budget Report for EBC	RPT	76
Philanthropy Funds FY Budget for EBC [History]	Philanthropy Funds FY Budget for EBC	RPT	79

[View Latest Instance](#)

4. If Historical Instances are available for the reports, click on the History Link

Close

1 - 4 of 4

Report Name	Description	Report Type	Report Id
AC256 Fund Detail EBC [History]	AC256 Fund Detail EBC	RPT	68
Funds AP Detail EBC [History]	Displays Funds for Accounts Payable Detail	RPT	75
Grant Budget Report for EBC [History]	Grant Budget Report for EBC	RPT	76
Philanthropy Funds FY Budget for EBC [History]	Philanthropy Funds FY Budget for EBC	RPT	79

5. From the List select the historical Instance of the report. Use the Created Date to help with this.
 - a. Click on the Name of the Report

Close

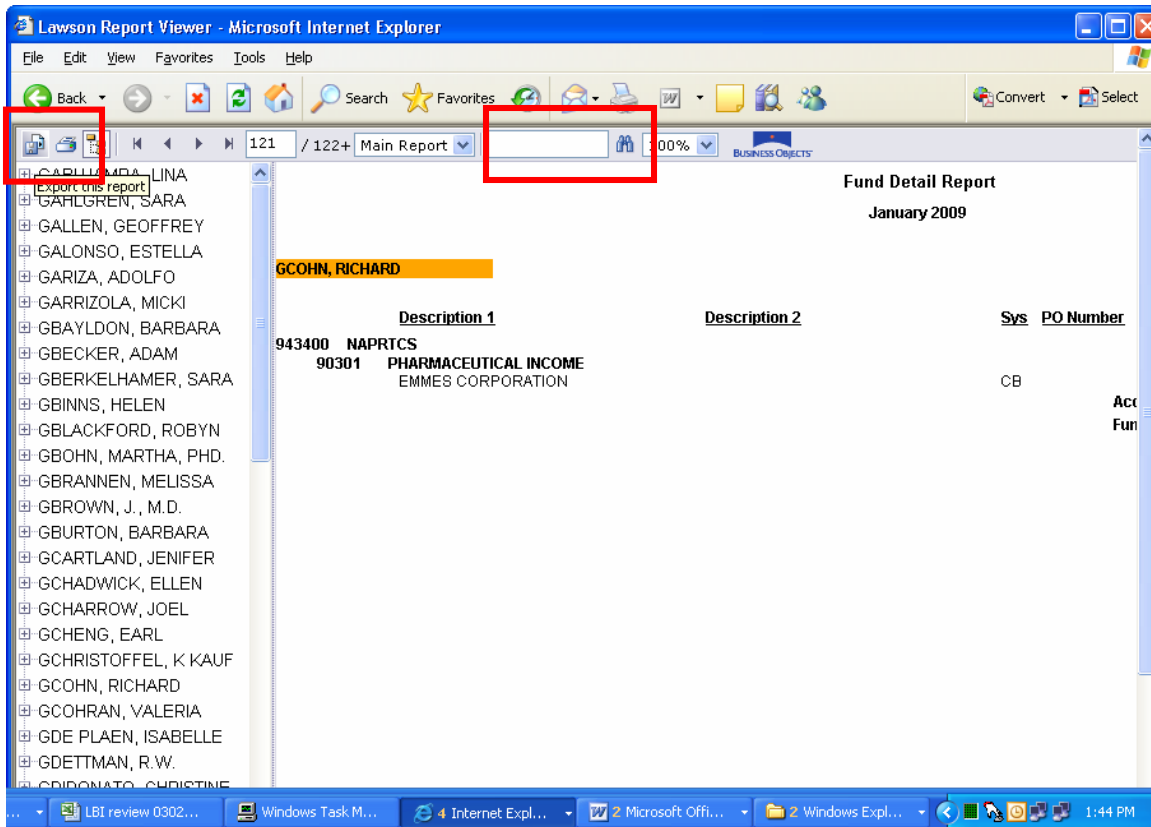
1 - 1 of 1 [Back to Previous Report List](#)

Instance Name	Created Date	Output Type	Created By
1_79_Philanthropy Funds FY Budget for EBC_ON_DEMAND	01/04/2009 09:16:13 AM	rpt	weblaw

6. To return back to List of reports click "Back to Previous Report List"

[1 - 1 of 1 Back to Previous Report List](#)

To Export Reports



Note: If you have multiple Fund directors please select the Principal investigator (or PI) from the bookmark on the left hand side of your screen.

- For Grants - There will be a “G” in front of the PI’s name
- For Philanthropy - There will be a “P” in front of the PI’s name

Note: If you don’t know the fund director, type in the search box (above) the fund #.

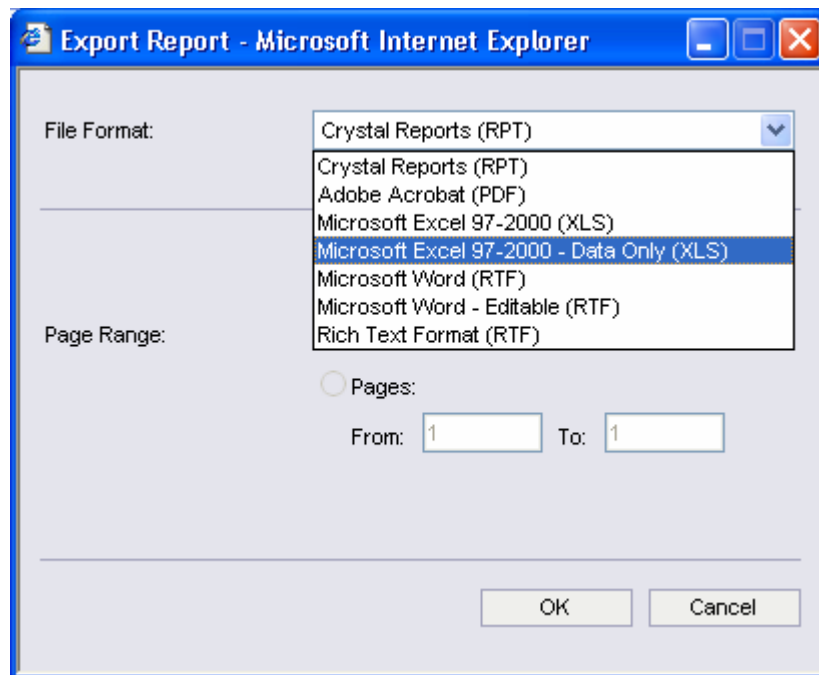
To export a report (available on all except the monthly financial reports), select one of the following

- Export (first item on tool bar above - in red box)
- Print (second item on the tool bar above - in red box)

To Export Reports

Once you click on export, you can choose to export into one of the below file format types:

- Adobe Acrobat (PDF)
- Microsoft Excel 97-2000 (XLS) - This will look identical to the report
- Microsoft Excel 97-2000 -Data Only (XLS) - This will download the data and you will need to use text to columns to see all data
- Microsoft Word (RTF) - This will look identical to the report
- Microsoft Word - Editable (RTF)
- Rich Text Format (RTF)

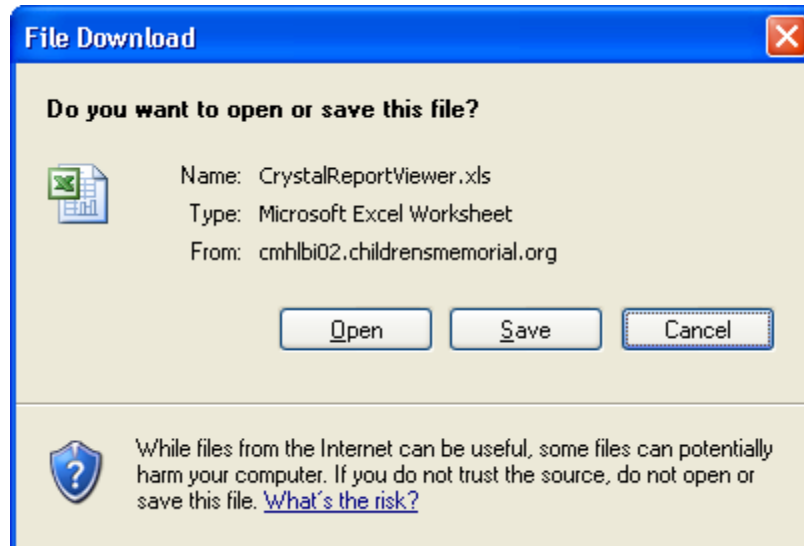


Note: You can choose the page range that you wish to export from under the page range section.

To Export Reports

Once you choose the file format type, your file will download, at that time, you have the option:

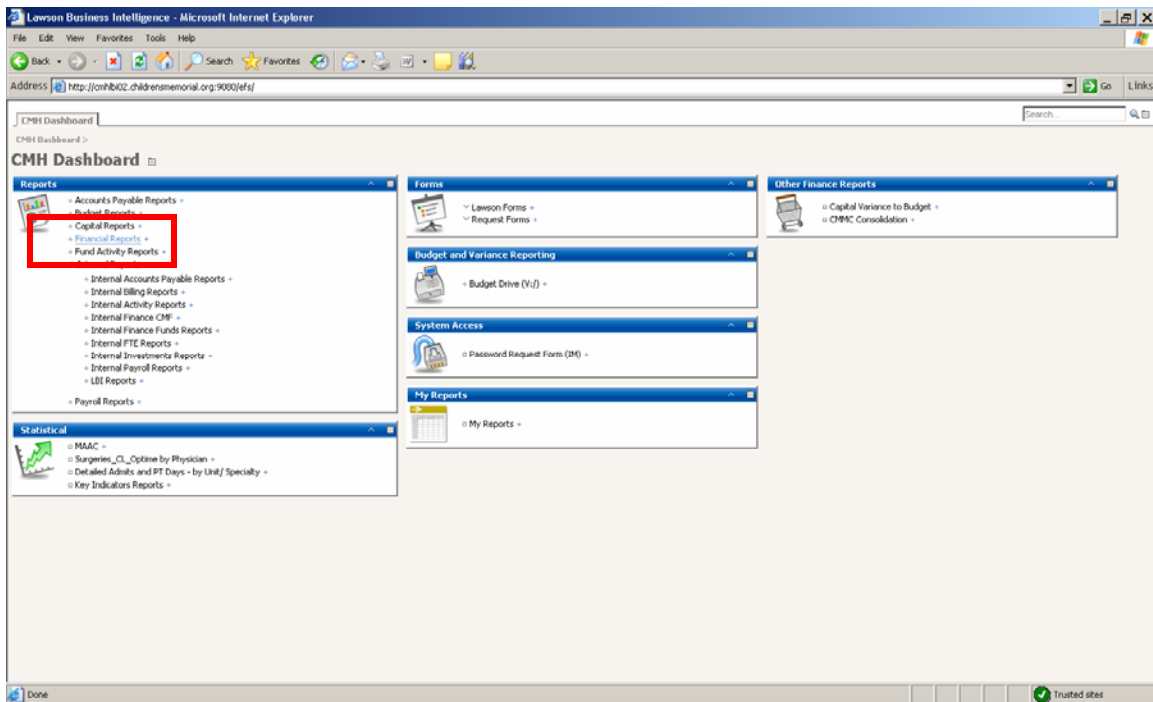
- To open directly into the file type
- To save in your folders



Drill -Around Instructions

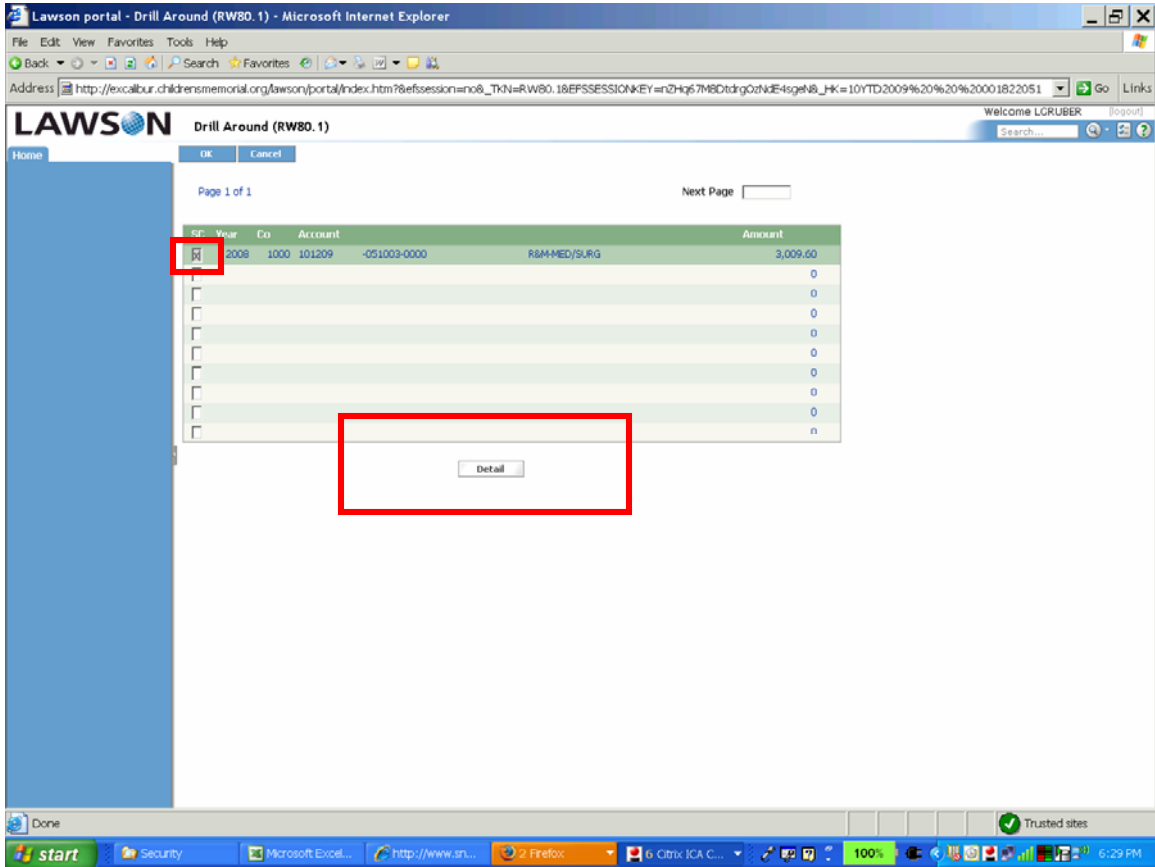
All reports are downloadable to excel except for the monthly responsibility reports (also know as Lawson P&L reports/Lawson Cost center reports).

For the Monthly Responsibility reports, the end users have the ability to drill back to the ledger detail.



The only report on your dashboard with drill-back functionality is the Financial Reports

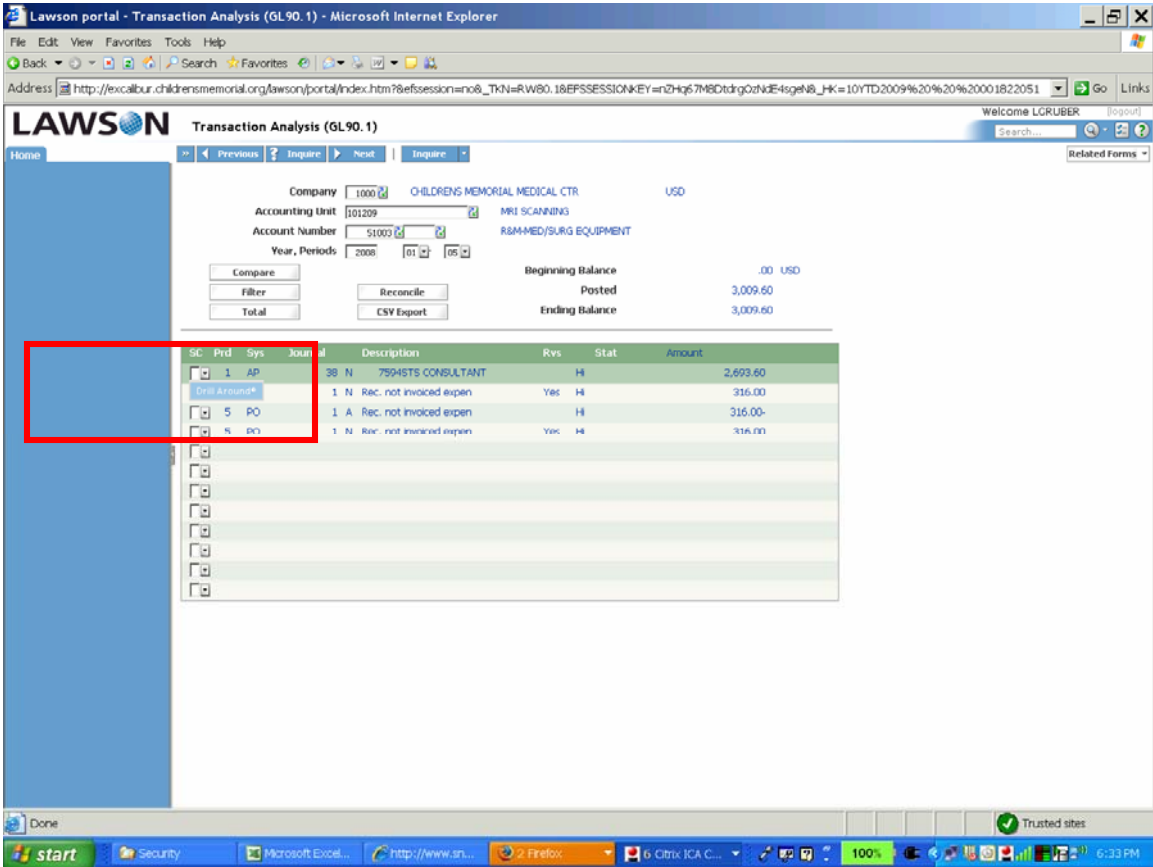
Drill -Around Instructions



When you drill back you will be taken to the Drill Around screen (above).

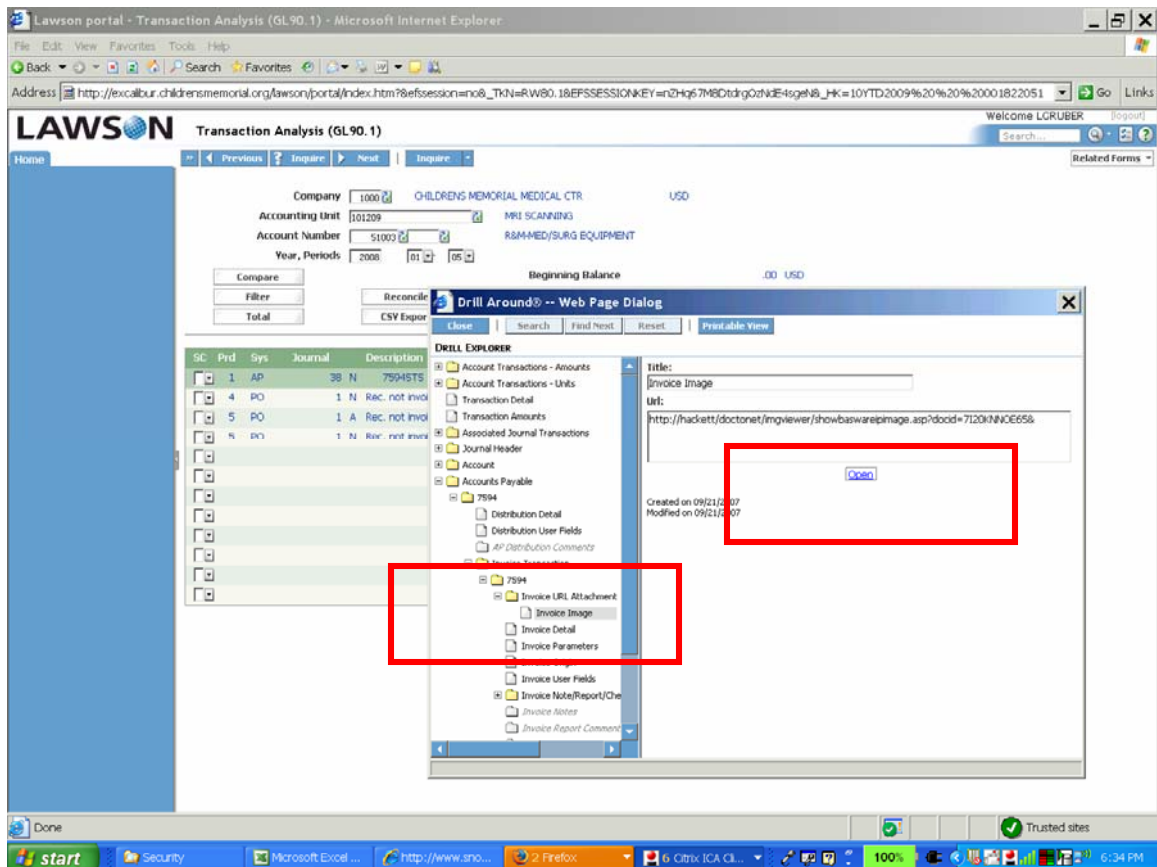
Place an “X” next to the line you want to review and click the Detail button.

Drill -Around Instructions



Place an “X” in front of the line, right click on the line (Refer to p. 16 for list of system codes), and select the “Drill Around”

Drill -Around Instructions



Once at this screen, you will see several options under Drill Explorer. In order to see the invoice, choose the following folder path:

- Accounts Payable
- Select Vendor # (already defaulted)
- Invoice Transaction
- Select Vendor # (already defaulted)
- Invoice URL Attachment
- Invoice Image
- Click on Open in the main window
- Image of invoice will appear on screen (from Basware)

Appendix I: System Codes List

<u>Sys</u>	<u>System</u>	<u>Brief Description</u>
AC	Activity	Fringe Benefits JE
AP	Accounts Payable	Invoice Payments
AM	Asset Management	Depreciation
CA	Cost Allocations	Allocation of Expenses
CB	Cash Book	Cashier's Receipts
EP	Epic	Daily Epic Revenue Interface
GL	General Ledger	Journal Entries (accruals)
GM	Grants Management	Template User (chargebacks)
IC	Inventory Control	Inventory Issuance
PO	Purchase Order	PO - Rec'd not Invoiced
PR	Payroll	Payroll Expenses
RJ	Recurring Journal	Recurring Journal Entries

Appendix II: FAQ

What is LBI?

- LBI is a reporting System in the form of a Dashboard
- There is the capability of data collection from multiple sources

What is LBI Replacing?

- LBI is replacing the current Lawson E-broadcast system used to provide end users with the following types of reports:
 - Monthly Financial Responsibility Reports
 - AP Distribution Reports
 - Grant Fund Reporting
 - Philanthropic Fund Reporting
 - All Payroll Reports
 - Capital Reports

Who is impacted by this change?

- All current Lawson P&L end users

Will the report content change?

- The report content shall remain the same for all reports.

Will the report be available more frequently?

- Reports will be available once all the financials are closed each month. Therefore, they will remain in the same current frequency.

What are the main functionality differences for LBI?

- All reports are available via PDF and in printer friendly formats
- All reports, with the exception of the Monthly Responsibility reports, are downloadable to Microsoft Excel.
 - Monthly Responsibility Reports are not crystal reports, therefore remain a Lawson generated report with no options to download onto excel.

Appendix II: FAQ

What are some notable changes with LBI?

- For access to Fund reports including payroll reports (both Grants/Philanthropy) access will be granted by Director, therefore:
 - Access will no longer be on a fund by fund basis
 - Careful consideration of access to sensitive payroll information will need to be monitored by the PI of each fund
- Capital Reports have been converted to Crystal reports with one additional detail report for end users