FACILITIES MANAGEMENT
000 Introductory Training

U004: FM Web Reporting
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From the FM webpage, [www.facm.umn.edu](http://www.facm.umn.edu), select Employees, then Web Reporting
NAVIGATING THE INTERFACE

Click here to open a quick reference document

Click here if you’ve forgotten your password and/or need to reset it

Enter your FM Web Reporting password here

Welcome to the FM Web Reporting System.

Click here to access a quick reference document which can assist you in navigating and accessing reports in this new version.

If you encounter a problem with a report please contact the Helpdesk (1-4357 or uitslo@umn.edu). Please make sure to give the Helpdesk the report name and whether the report has incorrect parameter values, is running but not displaying correct data, is blank, or has some other type of error. Also, please indicate the urgency for the report request so the reporting group can act.

Reporting Data Availability

All Webi and Crystal reports should be available as of Fri Dec 27 06:29:47 2013

For your user information, and click "Log On".

Ensure your account information, contact your system administrator.

User Name: swansonc
Password: 

Log On

Forgot your password? Click here to reset it.

If you are experiencing system issues please contact Systems Support at its@umn.edu or 5-1830.
NAVIGATING THE INTERFACE

Navigate between views by clicking a tab

The Home tab and Main Page is the default view upon log in
The Menu Bar provides access to several features:

- Applications – Access to apps available to you
- Preferences - Change default view and password
- Help – Documentation for using the interface
- Log Off – Close FM Web Reporting
- Search – Search for documents

Documents tab takes you to available reports
The Tool Bar allows interaction with documents such as creating shortcuts, scheduling reports, sending reports, and refreshing reports.

Drawers can be accessed by left-clicking them.
NAVIGATING THE INTERFACE

Change your password in Preferences by selecting Change Enterprise Password.

Then enter your old and new password, and confirm your new password.

Be sure to click Save & Close after entering new password.
MY DOCUMENTS

Send reports to your Inbox or someone else’s Inbox

Put shortcuts to frequently used reports in My Favorites folder for easy access later

⚠️ My Favorites and Inbox are managed and organized by the User only; if you delete something, it cannot be retrieved later
To insert a shortcut to a report in My Favorites folder:

1. right-click the report
2. select Organize
3. select Create Shortcut In My Favorites
To create a new folder in My Favorites:
1. right-click My Favorites
2. select New
3. select Folder
4. enter a new folder name
5. click OK

The Shortcut appears in the My Favorites folder
To move the shortcut:
1. right-click the object
2. select Organize
3. select Cut

The new folder appears under My Favorites and in the Details section.
4. right-click the destination folder
5. select Organize
6. select Paste

The Shortcut appears in the new folder
To delete an object from a folder:
1. right-click the object
2. select Organize
3. select Delete

To organize your Inbox:
1. right-click any object in the Inbox
2. select Organize
3. select a function

Functions can also be accessed from the Tool Bar.
RUNNING REPORTS

To run a report:
1. right-click a report
2. select View
Select a value from the Available Values then click the right arrow to move it to the Selected Values box.

Or enter a value then click the right arrow > to move it to the Selected Values box.

Or use the filter to search for values.

Then enter text you want to search for in the Set Filter field.

TIP: Select report criteria for each available parameter – try to use specific parameters as much as possible (District, Team, Date).
RUNNING REPORTS

Navigate through the report data by clicking the + sign next to a group to expand it.

If you don’t see a Navigation Map, click this icon to make it appear.

TIP: Press F11 to enlarge the browser, press F11 to return to normal size.
RUNNING REPORTS

Multiple reports can be opened at one time, and reports can be pinned and unpinned.

To change the report parameters on a Crystal Report, click the Refresh icon and the Prompts screen will reappear.

WARNING: Wait for a report to run completely before opening another, otherwise selection criteria will be blank.
Some WebI reports have Input Controls available, and specific data can be included or excluded from the report.

To minimize the Left Pane, click the left arrow.

Click a down arrow on the Filter Bar and select a value to filter the data.
RUNNING REPORTS

WebI Report

To close a report, click the X on the right side of the report tab.

Last refreshed date is displayed in the footer of the report.
To scroll through a WebI Report, click the diamond to move up or down a page, or move horizontally.
EXPORTING AND PRINTING REPORTS

Click the Export icon to export a document

Select file format options and page ranges

Do not select Crystal Reports format -- another file format must be selected
EXPORTING AND PRINTING REPORTS

Open or Save the file
Click the Printer icon on the Tool Bar to print the report.

Select your printer location and options and select Print.
SENDING REPORTS TO BI INBOX

Benefits of sending a report to a BI Inbox:

- No need to export the file and change it’s format
- Report is easily accessed and stored in FM Web Reporting
- Report functionality is preserved (e.g. drill-down, parameters, input controls)

To send a Crystal Report to a BI Inbox:
1. Right click the file name
2. select Send
3. select BI Inbox
SENDING REPORTS TO BI INBOX

Change search field to Find Full name and enter first and last name of individual

Select names from the search results, then click the right arrow to move the names to the Selected Recipients box
SENDING REPORTS TO BI INBOX

If you want to search for more names, select User List to start a new search of the entire list of users.

Keep the automatically generated report or specify a name.

When all the recipients and settings have been selected, click Send.

Send a shortcut of the report.
SENDING REPORTS TO BI INBOX

Navigate back to My Documents and click the Inbox to see objects.

Report appears in Inbox as a closed envelope until you open it.

Unread objects sent to your Inbox also appear on the Home tab.

Click the words “My Inbox” and you will be returned to your Inbox.

If you have not yet had training and need to run a report, click on the Documents tab above and then act similar to how it did in the old version.

This system will allow a user to run multiple report. However, please make sure your report has been cleaned before you pull up another report.
SCHEDULING REPORTS

To schedule a report:
1. right-click a report
2. select Schedule
SCHEDULING REPORTS

Only the shaded items should be changed when scheduling a report.

Crystal Report

WebI Report
Tip: For help with scheduling a report, click the ? in the right hand corner of the Schedule screen.

To schedule an object:

1. On the Documents tab, locate and select the object that you want to schedule.
2. Click More Actions > Schedule.
   - The "Schedule" dialog box appears.
3. Specify the scheduling options that you want to use.
   - For some scheduling options, the object settings configured by the administrator are selected in the preconfigured settings or change the settings.
4. Click Schedule.
SCHEDULING REPORTS

3. Select Instance Title to change the title of the report

4. The default report title auto-fills, but you can enter a new title if desired

5. Select Recurrence to configure how often the report should run

6. Select a frequency

7. Set Start Date/Time and End Date/Time

Do not schedule reports to run during daily data updates:
- Crystal Reports  8:45 pm – 11:00 pm
- WebI Reports  5:00 am – 6:45 am
8. To change the report parameters, select Prompts

9. Click the blue text next to a parameter to open a Prompt screen for changing a single parameter at a time

Tip: To edit all parameters, select Edit Values... and a screen with all available parameters will appear.
Select a value from the list, and click the right arrow to move it to the Selected Values box on the right.

To search for a value, click the Filter icon and enter the data to search for and click OK.

If the list of values is long, change the page number to scroll through the remaining values.
10. Select Formats to set the report file format

11. Select a file format from the list; **DO NOT** select a Crystal Reports format if sending to an email destination

12. Use these settings so drill-down capability is preserved
13. Select Destinations to configure “where” to send the report

14. Select a Destination:
   - Default Enterprise Location – instance of report appears on Home Page in My Recently Run Documents section only
   - BI Inbox – send instance of report to various BI Inboxes
   - Email – send instance of report to various email addresses
16. The default File Name selection is set to automatically generate a name. Select Use Specific Name to assign a specific file name.

15. Enter email address in FROM and TO fields (separated by a comma if sending to various addresses), enter Subject, and Message.

17. Click Schedule when all settings have been configured.
SCHEDULING REPORTS

After the report is scheduled, it appears in the report History.

To reschedule a report, right-click the report and select History.
To view more scheduling details of a report, right-click the report in the History screen and select Instance Details.

Find the “Recurring” instance of your report by clicking the filter icon on the right side of the Status field.
SCHEDULING REPORTS

Review scheduling details to ensure the correct report is selected; click Back to return to the History screen.

To reschedule a report:
1. right-click the “Recurring” instance of the report
2. select More Actions
3. select Reschedule
SCHEDULING REPORTS

4. Specify Replace existing schedule or Create new schedule from the existing schedule

5. Modify other settings as desired

6. Select Schedule when you’re done reconfiguring the settings
**SCHEDULING REPORTS**

The new, rescheduled instance appears in the History screen.

To delete a scheduled report that you created:
1. right-click the Recurring instance of the report in the History
2. select Organize
3. select Delete
Reports for a specific unit can be found on the Home Tab from the specific unit’s tab.
Your recently viewed reports appear here

Instances of reports that you have scheduled appear here
FINDING REPORTS

Click the folder name to view the reports inside.

Click the + sign to view a folder’s contents; click the – sign to close the folder.

All sub-folders and reports located in the selected folder will appear in the Details section.
1. To search for a document, navigate to the Documents tab

2. Click the Search drawer
3. Enter words in the report title **If you receive an error while searching, use fewer words and search again – this bug will be addressed in a later version**

4. Filter the results by clicking one of the categories

5. Search results appear in the Details section
HELP WITH FM WEB REPORTING

If you experience technical difficulties with FM Web Reporting, contact 1-HELP

Submit FM Report Request Form for a new report, signed by your unit’s Associate Director

Link to on-line, interactive tutorials for this interface