Albuquerque Public Schools (APS) – Business Systems



# Lawson Business Intelligence (LBI) Reports

Desktop Reference September, 2020

- 1. Log into your Lawson application with your administrative account (e + employee ID + a)
- 2. Click "Bookmarks" tab on the portal page (Step 1)
- 3. Hover over "Business Intelligence" drop down until "Business Intelligence" link shows up to the right of the "Business Intelligence" drop down (Step 2) \*
- 4. Click on "Business Intelligence" drop down (Step 3)

\* If "Business Intelligence" does not display as option, use the "How to create a bookmark in Lawson" on the Budget website, then return to these directions to proceed.

infor 1	
Bookmarks - Ibl_FAVORITES -	
2 Business Intelligence Business Intelligence	
Lawson 3	
Common Tasks	Useful Information
Manage Subscriptions Manage your navigation links and home page content	> Hotkeys Help
Manage User Options Customize Portal options and your shortcuts	

### How to run Lawson Business Intelligence Reports

1. Click on the tab labeled "General"

info						
Be	okmarka 💌	BL_FAVORITES -	Lawton Portal Home	Help a	Preferences #	Logout
	for 1	31 for Lawson				
Dash	boards					
Gener	interner:	a				
C	General +					
	Shared I	Budget Status Reports	~	\$		
		BUDGET_STATUS_REPORT_TO_INCLUDE_BUDGET_EDIT_GROUPS_rev_8/2020(SQL)				
	Shared (	Open PO Reports	~	*		
		OPEN_PO_BY_LOCATION_rev_5/2019(SQL) OPEN_PO_Report_byline_rev_5/2019(SQL)				
	Requisiti	ion Reports	~	*		
		ORDER_STATUS(SQL) ORDER_STATUS_REPORT_ rev_1/2020(SQL)				

2. Click on the report you want to run.

# BUDGET\_STATUS\_REPORT\_TO\_INCLUDE\_BUDGET\_EDIT\_ GROUPS\_rev\_8/2020(SQL)

• Shows the budget status with the new budget edit groups for selected school(s) and department(s) for a selected fiscal year

#### 1. Click on BUDGET\_STATUS\_REPORT\_TO\_INCLUDE\_BUDGET\_EDIT\_GROUPS\_rev\_8/20/200(SQL)



- 2. Enter the fiscal year.
- 3. Select school(s) and/or department(s) for which you want to run a budget status report. Once the school(s) and/or department(s) is highlighted in blue, click on the arrow pointing right OR you can enter a value with the school or department 4-digit location and click on arrow pointing right.

Enter prompt values.

	Enter FISCAL YEAR:	FISCAL YEAR
/	2018	
[	Select or Enter 4 digit LOCATION(s):	LOCATION
	Available Values: Selected Values:	
	School Instruction Dept: 2108 Special Education Preschool School Instruction Dept: 2108 Special Education Preschool	
	School Instruction Dept: 2150 Student, Family & Communit School Instruction Dept: 2175 Fine Arts Secondary	
	School Instruction Dept: 2176 Fine Arts Elementary	
	School Support Dept: 2143 Indian Education	
	School Support Dept: 2160 Library Media Services	
	School Support Depth 2200 Statemy Parent & Employee Se	
	Enter a value:	
	Remove Remove All	
	ОК	

4. Once the location(s) is selected, click the "OK" button. The report will take several minutes to generate.

5. The report will run in Crystal Report format. To export the report into another format (such as PDF, Excel, CSV etc.) click on the export icon on the top left of the screen.



6. Click on the drop down box to select the format in which you want the report. Click on "Export".

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report_BUDGET_STATUS - 02_5_201								
± 0243	#2850 Albu	querque Gro	oup			Fiscal	Year 20	19
	0243 Coron	ado Elemen	tary School			Budget S	tatus R	eport
						2040.1.1	. 20 2.4	4
						2018 July	y 20, 2:14	4 pm
	ACCT LINET	ACCOUNT CUD	DECONSTION					BUDGET
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	EXPENDITURE	ACCOUNTS						
	02420101000	511000 1711			or Arr	ist - Grados 1-12 Salarios	1.00	16 216 00
	02430201000	511000 1413	EARLY CHILDHO	DOD ED T	eache	ers -Early Childhood Salaries	2.00	91.856.00
	02430201000	511000 1713	EARLY CHILDHO	DOD ED Ir	ns Ass	istants - Ece Salaries	2.00	32,432.00
	02430701000	511000 1411	MUSIC/CHOIR/	BAND/O T	eache	ers - Grades 1-12 Salaries	0.50	22,550.00
	02430801000	511000 1411	PHYSICAL EDU	Evnor	ŀ		~	45,928.00
	02431021000	511000 1416	BILINGUAL	LAPOI	L		~	80,374.00
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	02431021000	513000 1416	BILINGUAL	File	Form			6,000.00
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	02431031000	511000 1610	BILINGUAL SU	Pag	~	Crystal Reports (RPT)		5.000.00
	02431501000	513005 1412	SPECIAL EDUC	-		PDF		2,950.00
	02438501000	511000 1411	GENERAL EDU					555,729.00
	02438501000	513000 1411	GENERAL EDU			Microsoft Excel (97-2003)		4,000.00
	02438501000	513000 1711	GENERAL EDU			Microsoft Excel (97-2003) Data-Only		3,000.00
	02438501000	513005 1411	GENERAL EDU					8,085.00
	02438501000	559150	GENERAL EDU			MICrosoft Excel Workbook Data-only		4,000.00
	02430162100	511000 1214	NURSING SER			Microsoft Word (97-2003)		28,126.00
	02430162100	511000 1215	NURSING SER			Microsoft Word (97-2003) - Editable		21 036 00
	02438502200	511000 1210	GENERAL EDU			Phicrosoft Word (97-2003) - Editable		24.081.00
	02438502200	511000 1217	GENERAL EDU			Rich Text Format (RTF)		16,216.00
	02438502200	513005 1211	GENERAL EDU			Senarated Values (CSV)	xport	5,000.00
	02438502400	511000 1112	GENERAL EDU			Separated Values (CSV)		68,261.00
	02438502400	511000 1217	GENERAL EDUC	ATION S	i.	XML	2.00	39,908.00
	02438502400	559150	GENERAL EDUC	ATION 0	ther	Contract Services	-	1 558 00

7. Click on "Open" at the bottom of the screen to open the report in your selected format. You can also save the report from here.

Do you want to open or save report\_BUDGET\_STATUS - 02\_5\_2018\_Schools.rpt.pdf from apbipd.aps.edu? Open Save 🔻 Cancel 🗙

## OPEN\_PO\_BY\_LOCATION\_rev\_5/2019(SQL)

- Shows what purchase orders are still open by their location
- 1. Click on OPEN\_PO\_BY\_LOCATION\_rev\_5/2019(SQL) report



2. Select the location(s) for which you want data. Once the location is highlighted in blue, click on the arrow pointing right. Once location(s) is selected click the "OK" button.

Enter LOCATION: Available Values: Albuquerque Grp: 0243 Coronado Elementary School Albuquerque Grp: 0252 East San Jose Elementary School Albuquerque Grp: 0252 East San Jose Elementary School Albuquerque Grp: 0251 Lugene Field Elementary School Albuquerque Grp: 0291 Longfellow Elementary School Albuquerque Grp: 0291 Longfellow Elementary School	ompt values.	
Albuquerque Grp: 0300 Lowell Elementary School       Image: I	Interpretation         LOCATION:         able Values:         rquerque Grp: 0243 Coronado Elementary School         querque Grp: 0244 Dolores Gonzales Elementary School         querque Grp: 0252 East San Jose Elementary School         querque Grp: 0291 Longfellow Elementary School         querque Grp: 0300 Lowell Elementary School         1         value:	LOCATION
Remove All	Remove Al	

3. You can also search for your school or department by clicking on the filter icon and typing in either your school or department location number or name and clicking "OK".

Enter LOCATION:		LOCATI
Available Values: Albuquerque Grp: 0243 Coronado Elementary School Albuquerque Grp: 0244 Dolores Gonzales Elementary School Albuquerque Grp: 0252 East San Jose Elementary School Albuquerque Grp: 0251 Lugene F Elementary School Albuquerque Grp: 0300 Lowell Elementary School Multiple School Multiple School Set Filte Inse	Selected Values:	
	OK Cancel Remove All	

4. Select the location(s) for which you want data. Once the location is highlighted in blue, click on the arrow pointing right. Once location(s) are selected click the "OK" button.

Enter LOCATION:	LOCATIO
Available Values:  Atrisco Grp: 0339 Carlos Rey Elementary School Rio Grande Grp: 0297 Los Padillas Elementary School Valley Grp: 0336 Los Ranchos Elementary School  	Selected Values: Valley Grp: 0336 Los Ranchos Elementary School Remove Remove All
	ОК

5. The report will run in Crystal Report format. To export the report into another format (such as PDF, Excel, CSV etc.) click on the export icon on the top left of the screen.

0 0	• •									
đĩđ	Group Tree									
1		OPEN P	O RE	PORT - By Oj	oen Line					
		ACCT UNIT	FUND	ACCOUNT ACTIVITY	<u>CATEGORY</u> <u>DROP SHIP N</u>	IAME				

6. Click on drop down box to select the format in which you want the report. Click on "Export".

Group Tree
Feport_BUDGET_STATUS - 02_5_201     #2850 Albuquerque Group     0243     #2850 Albuquerque Group     0243 Coronado Elementary School     Budget Status Report
Budget Status Report
2018 July 20, 2:14 pm
ACCT UNIT ACCOUNT SUB DESCRIPTION FTE BUDG
1100 OPERATIONAL
EXPENDITURE ACCOUNTS
02430101000 511000 1711 CLASSROOM EDUCATIO Ins Assist - Grades 1-12 Salaries 1.00 16,216
02430201000 511000 1413 EARLY CHILDHOOD ED Teachers - Early Childhood Salaries 2.00 91,856
02430201000 511000 1713 EARLY CHILDHOOD ED Ins Assistants - Ece Salaries 2.00 32,432
02430701000 511000 1411 MUSIC/CHOIR/BAND/O Teachers - Grades 1-12 Salaries 0.50 22,550
02430801000 511000 1411 PHYSICAL EDU Evnort 45,928
02431021000 511000 1416 BILINGUAL 80,374
02431021000 511000 1711 BILINGUAL 32,432
02431021000 513000 1416 BILINGUAL 6,000
02431021000 533300 BILINGUAL File Format: 5,000
02431021000 559150 BILINGUAL 4,045
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02431021000 573320 BILINGUAL 1,000
02431031000 511000 1610 BILINGUAL SU Pag MOMMANDEMINI, SUBJECT 5,000
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02438501000 513005 1411 GENERAL EDU Microsoft Excel Workbook Data-only 4,000
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02430162100 511000 1216 NURSING SER' Microsoft Word (97-2003) - Editable 21,036
02438502200 511000 1212 GENERAL EDU
02438502200 511000 1217 GENERAL EDU KICH Text Format (RTF) 16,216
02438502200 513005 1211 GENERAL EDU Separated Values (CSV) 5,000
02438502400 511000 1112 GENERAL EDU 68,261
02438502400 511000 1217 GENERAL EDUCATION S XML 2.00 39,908

7. Click on "Open" at the bottom of the screen to open the report in your selected format. You can also save the report from here.

Do you want to open or save report BUDGET STATUS - 02 5 2018 Schools.rpt.pdf from apbipd.aps.edu?	Open	Save 🔻	Cancel	x
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### **OPEN\_PO\_Report\_byline\_rev\_5/2019(SQL)**

- Shows all open purchase orders for the entire district
- 1. Click on OPEN\_PO\_Report\_byline\_rev\_5/2019(SQL)

Shared Open PO Reports

2. The report will run in Crystal Report format. To export the report into another format (such as PDF, Excel, CSV etc.) click on the export icon on the top left of the screen.

0									
676) Eg	Group Tree	OPEN I	PO REI	PORT - By O	pen Line				
		ACCT_UNIT	FUND	ACCOUNT ACTIVITY	CATEGORY	DROP SHIP NAME			

3. Click on drop down box to select the format in which you want the report. Click on "Export".

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Group Tree report_BUDGET_STATUS - 02_5_201 1 0243	#2850 Albu 0243 Coron	querque Gro ado Elemen	oup tary School		_	Fiscal Budget S 2018 July	<b>Year 20</b> Status R y 20, 2:14	<b>19</b> eport 4 pm
	ACCT UNIT 1100 OPERATIO	ACCOUNT SUB	DESCRIPTION				FTE	BUDGET
	EXPENDITURE	ACCOUNTS	CLASSBOOM			int Condex 1 12 Februire	1.00	16 216 02
	02430201000	511000 1/11	EARLY CHILDHO	DOD ED T	eache	ers -Early Childhood Salaries	2.00	91,856.00
	02430201000	511000 1713 511000 1411	EARLY CHILDHO MUSIC/CHOIR/	DODED In BAND/O T	ns Ass 'eache	iistants - Ece Salaries ers - Grades 1-12 Salaries	2.00	32,432.00 22,550.00
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	02431021000 02431021000	559150 561180	BILINGUAL		Crys	tal Reports (RPT)		4,046.00
	02431021000	573320	BILINGUAL	Dag	~	Crystal Reports (RPT)		1,000.00
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	02438501000	559150	GENERAL EDU			Microsoft Excel Workbook Data-only		4,000.00
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	02430162100	511000 1216 511000 1212	NURSING SER			Microsoft Word (97-2003) - Editable		21,036.00
	02438502200	511000 1212	GENERAL EDU			Rich Text Format (RTF)	xport	16,216.00
	02438502200 02438502400	513005 1211 511000 1112	GENERAL EDU GENERAL EDU			Separated Values (CSV)		5,000.00 68,261.00
	02438502400	511000 1217 559150	GENERAL EDUC	CATION S	ther	XML Contract Services	2.00	39,908.00

4. Click on "Open" at the bottom of the screen to open the report in your selected format. You can also save the report from here.

Do you want to open or save report\_BUDGET\_STATUS - 02\_5\_2018\_Schools.rpt.pdf from apbipd.aps.edu? Open Save 💙 Cancel 🗙

# **REQUISITION\_STATUS\_REPORT\_ rev\_1/2020(SQL)**

- Shows requisitions and their status by location
- 1. REQUISITION\_STATUS\_REPORT\_rev\_1/2020(SQL)



2. Select location and enter other optional parameters as needed then click the "OK" button.

🥔 report_Requisition Status Report 03-04-2019_LM - Lawson Report Viewer - Internet Explorer				<
https://apbipd.aps.edu/ers/ersRequestHandler.jsp?CMD=VIEW	/&INSTANCEID=LATEST&OuterWrapper=true&NewReport=tru	ue&REPORTID=615	5&EFSSESS	
Enter prompt values.				•
Enter Requisition Location:		Requisitio	nLocation	
026 - STUDENT/SCHOOL COMM, SRVC026				
[OPTIONAL] Enter Requisition Creation Date(s):		RequisitionCre	ationDate	
Start of Range:	End of Range:	7		
Enter a Value:	Enter a Value:			
07/01/2018	06/30/2019			
✓ Include this value □ No lower value	✓ Include this value □ No upper value			
				1
[OPTIONAL] Enter Requisition Requester(s):		Requisition	Requester	
	Selected Values:			
	Pemove All			
	KONOVE KENOVE AI			
[OPTIONAL] Select Requisition Status(es):		Requisit	tionStatus	
Available Values:	Selected Values:			~

3. Click on drop down box to select the format in which you want the report. Click on "Export".

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5									
report_BUDGET_STATUS - 02_5_201	#2850 Albuquerque Group Fiscal Year 20					19			
	0243 Coron	ado Elemen	tary School			Budget S	Budget Status Report		
	,				2018 July	2018 July 20, 2:14 pm			
	ACCT UNIT	ACCOUNT SUB	DESCRIPTION				FTE	BUDGET	
	1100 OPERATIO	ONAL							
	EXPENDITURE	ACCOUNTS							
	02430101000	511000 1711	CLASSROOM EI	DUCATIO II	ns Ass	ist - Grades 1-12 Salaries	1.00	16,216.00	
	02430201000	511000 1413	EARLY CHILDHO	DOD ED T	eache	ers -Early Childhood Salaries	2.00	91,856.00	
	02430201000	511000 1713	EARLY CHILDHO	DOD ED I	ns Ass	istants - Ece Salaries	2.00	32,432.00	
	02430701000	511000 1411	MUSIC/CHOIR/	BAND/O T	eache	ers - Grades 1-12 Salaries	0.50	22,550.00	
	02430801000	511000 1411	PHYSICAL EDU	Export	+		~	45,928.00	
	02431021000	511000 1416	BILINGUAL	Export			~	80,374.00	
	02431021000	511000 1711	BILINGUAL					32,432.00	
	02431021000	513000 1416	BILINGUAL	rat.	F			6,000.00	
	02431021000	533300	BILINGUAL	File	Forn			5,000.00	
	02431021000	559150	BILINGUAL		Care	tal Departs (BDT)		4,046.00	
	02431021000	561180	BILINGUAL		Crys			10,000.00	
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	02431031000	511000 1610	BILINGUAL SU	ray				5,000.00	
	02431501000	513005 1412	GENERAL EDU			PDF		2,950.00	
	02458501000	511000 1411	GENERAL EDU			Microsoft Excel (97-2003)		4 000 00	
	02438501000	513000 1711	GENERAL EDU					3,000,00	
	02438501000	513005 1411	GENERAL EDU			Microsoft Excel (97-2003) Data-Only		8.085.00	
	02438501000	559150	GENERAL EDU			Microsoft Excel Workbook Data-only		4,000.00	
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	02430162100	511000 1215	NURSING SER			Microsoft Word (07 2002) Editable		21.036.00	
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	02438502400	511000 1217	GENERAL EDUC	ATION S	5	XML	2.00	39,908.00	
	02438502400	559150	GENERAL EDUC	ATION C	Other	Contract Services	1	1 558 00	

4. Click on "Open" at the bottom of the screen to open the report in your selected format. You can also save the report from here.

Do you want to open or save report_BUDGET_STATUS - 02_5_2018_Schools.rpt.pdf from apbipd.aps.edu?	Open	Save 🔻	Cancel	×