Web Focus Instructions

Step One: You can get to the website one of two ways:

1. Go to website: https://webfocus.sfasu.edu/ibi_apps/bid-login

2. Or you can go to http://banner.sfasu.edu
   - You will then click on the '**Other software products for use with Banner [PROD]**' link
   - Then click on the **WebFOCUS Reporting Login** link

Step Two: You will logon in one of two ways:

1. When you logon to your computer in the morning and your logon screen has a third line with a 'Log on to' field like this:

   Then you will logon with your username/password that you use to log in to your computer (Windows Logon)

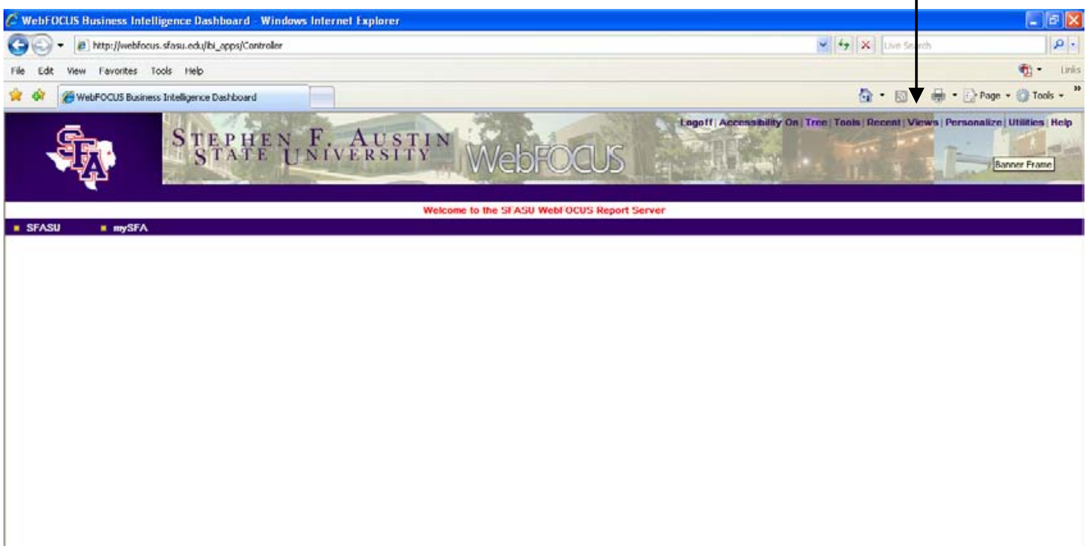
2. Otherwise you will use your MySFA username and six digit pin number

Step Three: If this is the first time logging in you will have to close the program and inform Kyley King (ext. 4353) that you have logged in to Web Focus. She will need to inform the ITS department to set up your dashboard within the system.

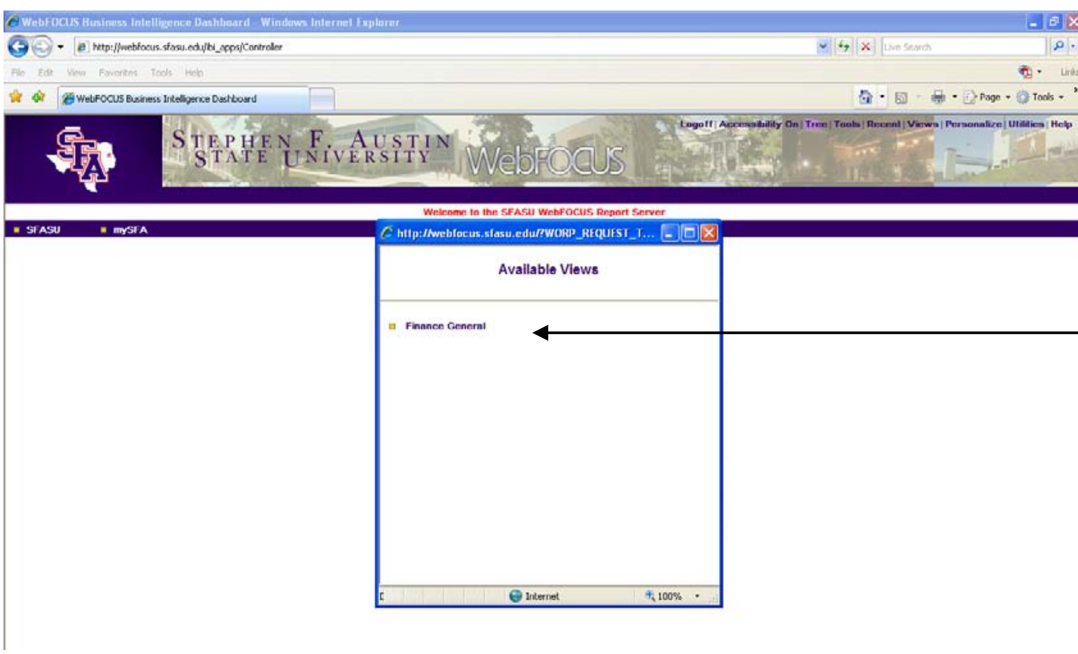
Step Four: Once Kyley has informed you that your dashboard is set you will log in using the same username/password as before.

Step Five: Click the views link:

Views Link



Step Six: You will get a pop box like you see below. You will select the Finance General link:

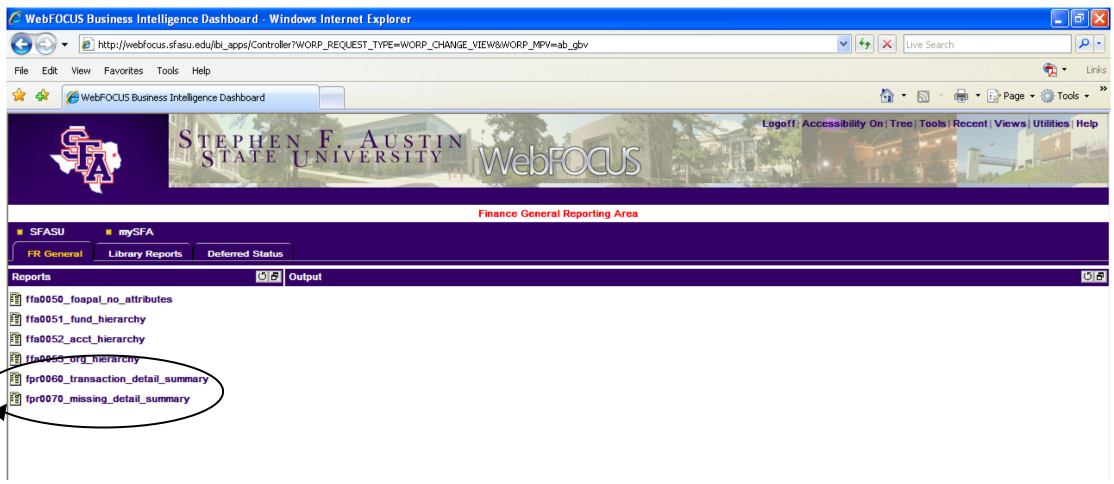


Select Finance General

Step Seven: You will have a screen with several reports available. The two that you will use are Transaction Detail Summary and Missing Detail Summary. The functions of the reports are as follows:

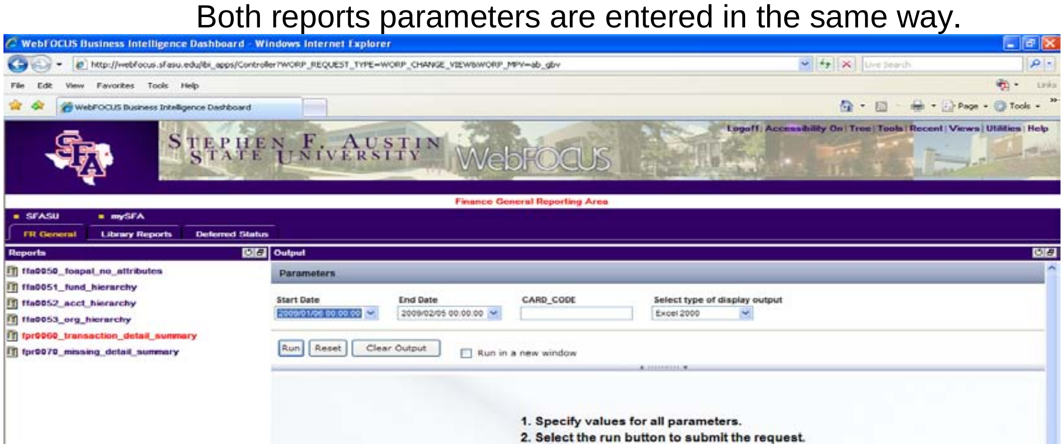
1. The Missing Detail Summary is used to ensure that all details have been entered. The report will only show charges that have the default ‘Purchase Card Transaction’ in the description field. If you have detailed all charges you will get a report that states ‘No HTML Output!’

2. The Transaction Detail Summary is the report that is run after all charges are detailed at the end of a credit cycle. It will need to be sign by both the cardholder and a Reviewer or the Department Head.



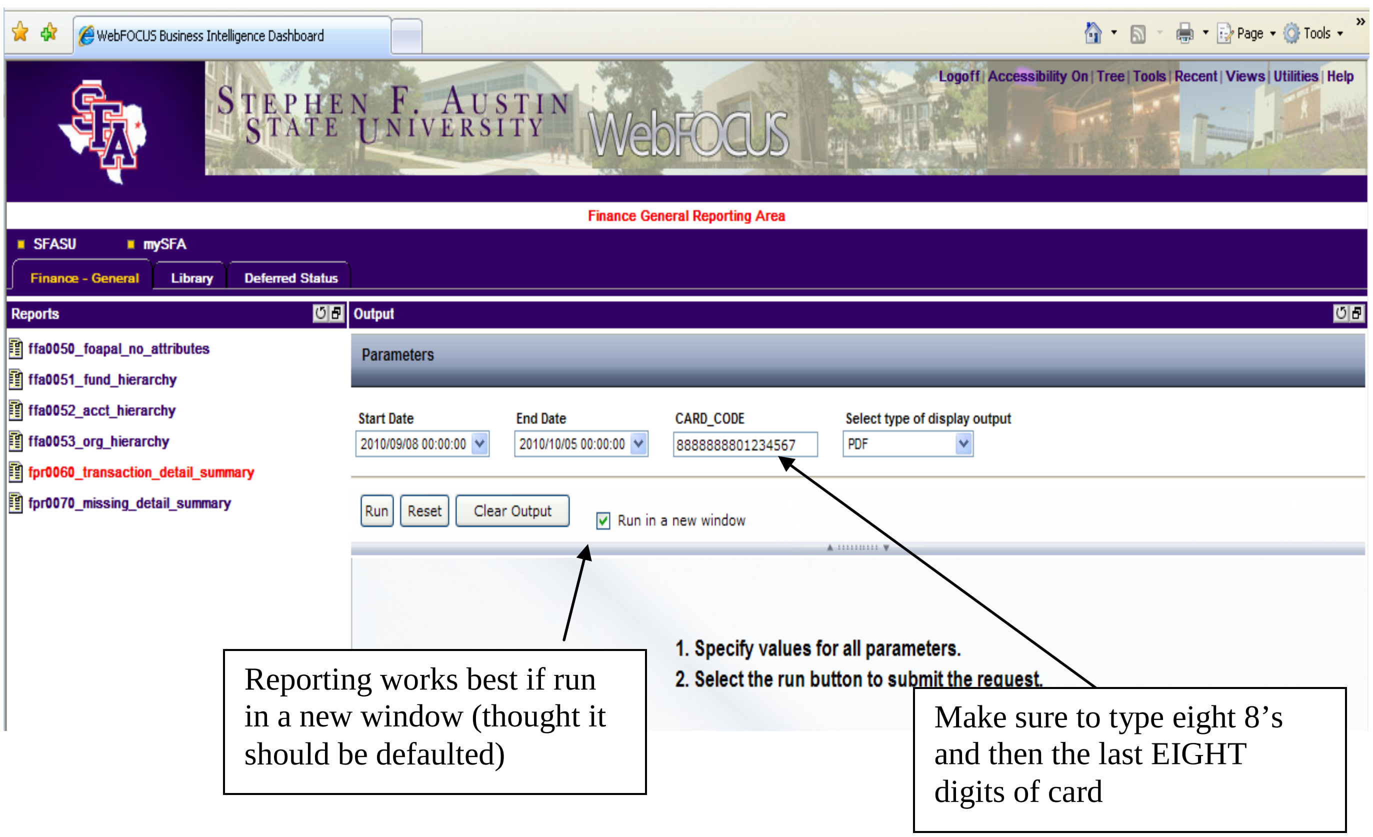
fpr0060_transaction_detail_summary
fpr0070_missing_detail_summary

Step Eight: Select whichever report you would like to run by clicking the link. Both reports parameters are entered in the same way.



Step Nine: You will enter the parameters as follows:

1. The start date will always be the start of the credit cycle. Note – the date is in yyyy/mm/dd format. You can think of the start as the month prior to the month as the one we are currently in. There is only one selection for each month.
2. The end date will always be the statement date. You can find the statement date on your statement. You can also always assume that the statement date is always the month that we are currently in.
3. The card code will need to contain eight 8's and then the last eight digits of your card for a total of 16 digits (i.e. 8888888801234567).
4. The selection that asks you to 'Select type of display' is asking for the format. The format seems to work best in the PDF format.
5. It's a good practice to check the box that states 'Run in a new window'



Step Nine: Once all parameters are entered select the run button

Step Ten: You can then print the report. Once you are finished with the program simply close the window.