

# WebFOCUS

The image shows a web browser window with the following elements:

- Browser Tab:** Business Intelligence Por
- Address Bar:** Secure | https://www.banweb.mtu.edu/ibi\_apps/signin
- Bookmarks Bar:** Apps, Bookmarks, Google URL Shortene, Inbox - hbabcock@m, CALENDAR, Identity Self-Service L, ServiceDesk
- Header:** Michigan Tech logo and name.
- Page Title:** Business Intelligence Portal
- Form Fields:**
  - Username:
  - ISO Password:
- Button:** Login

# Contents

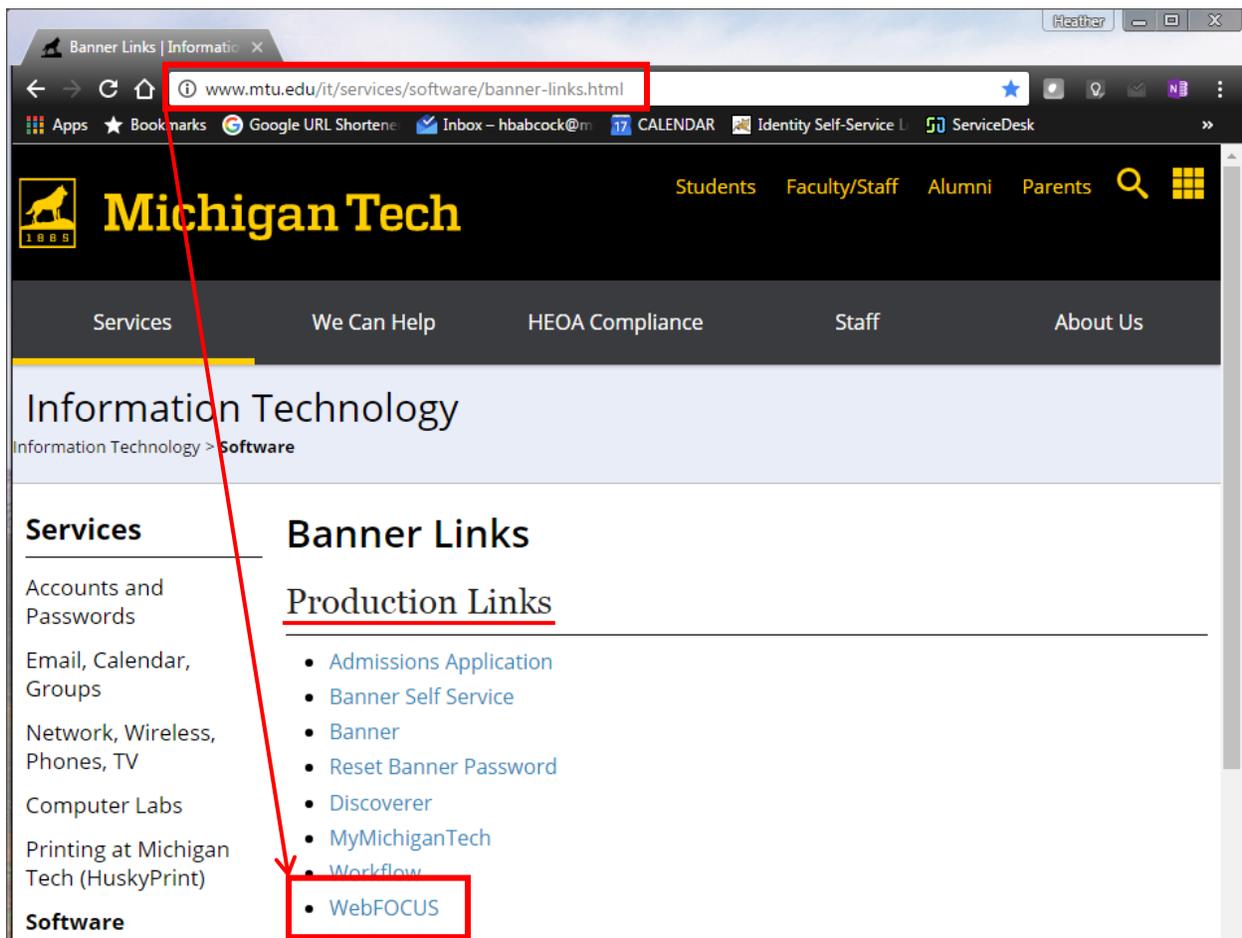
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## Accessing WebFOCUS

Use **ISO** credentials to access WebFOCUS

**Direct Access URL:** [https://www.banweb.mtu.edu/ibi\\_apps/signin](https://www.banweb.mtu.edu/ibi_apps/signin)

**Through IT “Banner Links” page:** Go to <http://www.mtu.edu/it/services/software/banner-links.html> and click **WebFOCUS** under *Production Links*.



The screenshot shows a web browser window with the URL [www.mtu.edu/it/services/software/banner-links.html](http://www.mtu.edu/it/services/software/banner-links.html) in the address bar. The page features the Michigan Tech logo and navigation links for Students, Faculty/Staff, Alumni, and Parents. A main navigation bar includes Services, We Can Help, HEOA Compliance, Staff, and About Us. The page content is divided into two columns: Services and Banner Links. Under Banner Links, there is a sub-section for Production Links, which contains a list of links: Admissions Application, Banner Self Service, Banner, Reset Banner Password, Discoverer, MyMichiganTech, Workflow, and WebFOCUS. The WebFOCUS link is highlighted with a red box, and a red arrow points from the address bar to it.

**Services**

- Accounts and Passwords
- Email, Calendar, Groups
- Network, Wireless, Phones, TV
- Computer Labs
- Printing at Michigan Tech (HuskyPrint)

**Software**

**Banner Links**

Production Links

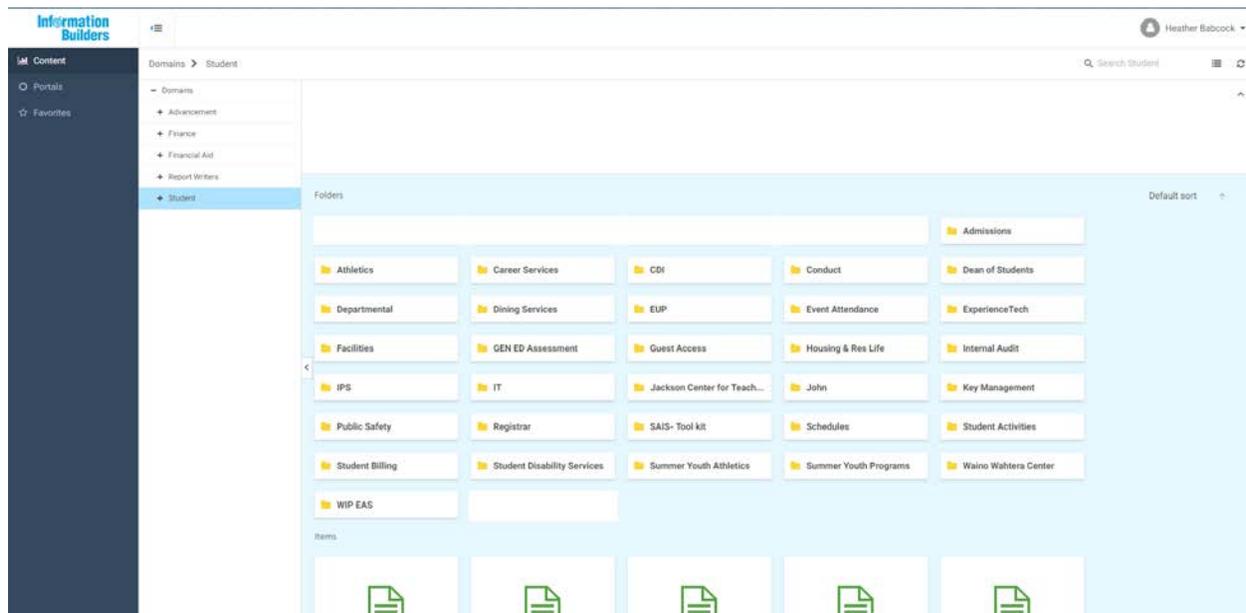
- Admissions Application
- Banner Self Service
- Banner
- Reset Banner Password
- Discoverer
- MyMichiganTech
- Workflow
- WebFOCUS**

## About WebFOCUS

WebFOCUS is the new reporting tool that has replaced **Discoverer Reports**. In the near future it will also replace reports run from **GZAORPT** in **BANNER (ORACLE Reports)** and reporting functions in **ASPIRE**.

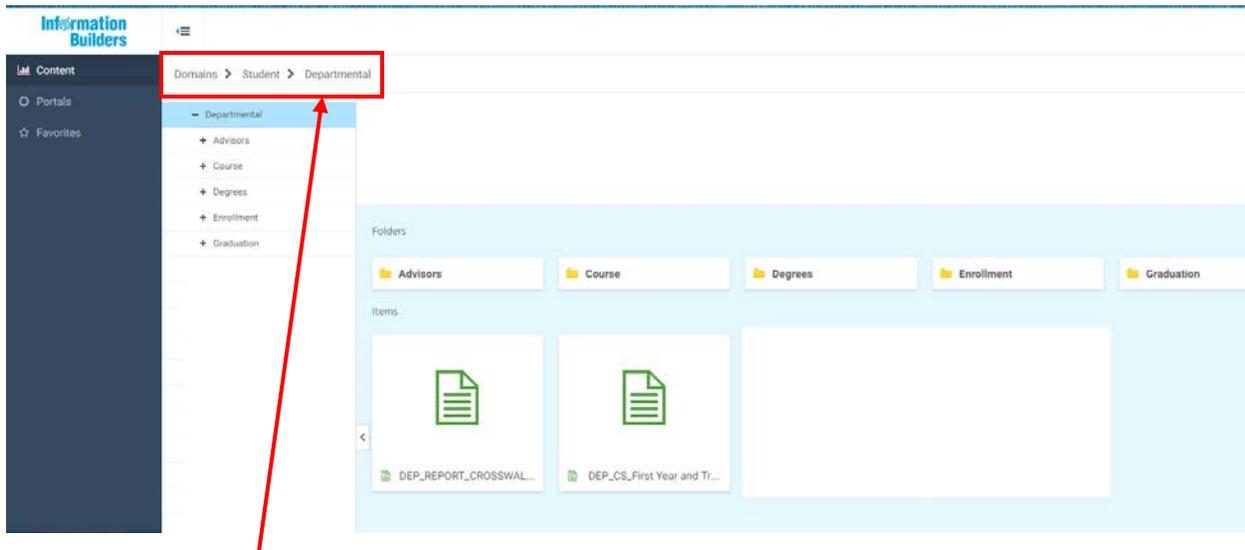
The intent is to move everything from these platforms to WebFOCUS so that you only need to access one site for your reporting needs!

## Content Menu



## Content

Content displays the Banner Reporting system(s) you have access to. Double-click the displayed folder to drill down into the list of available reports.



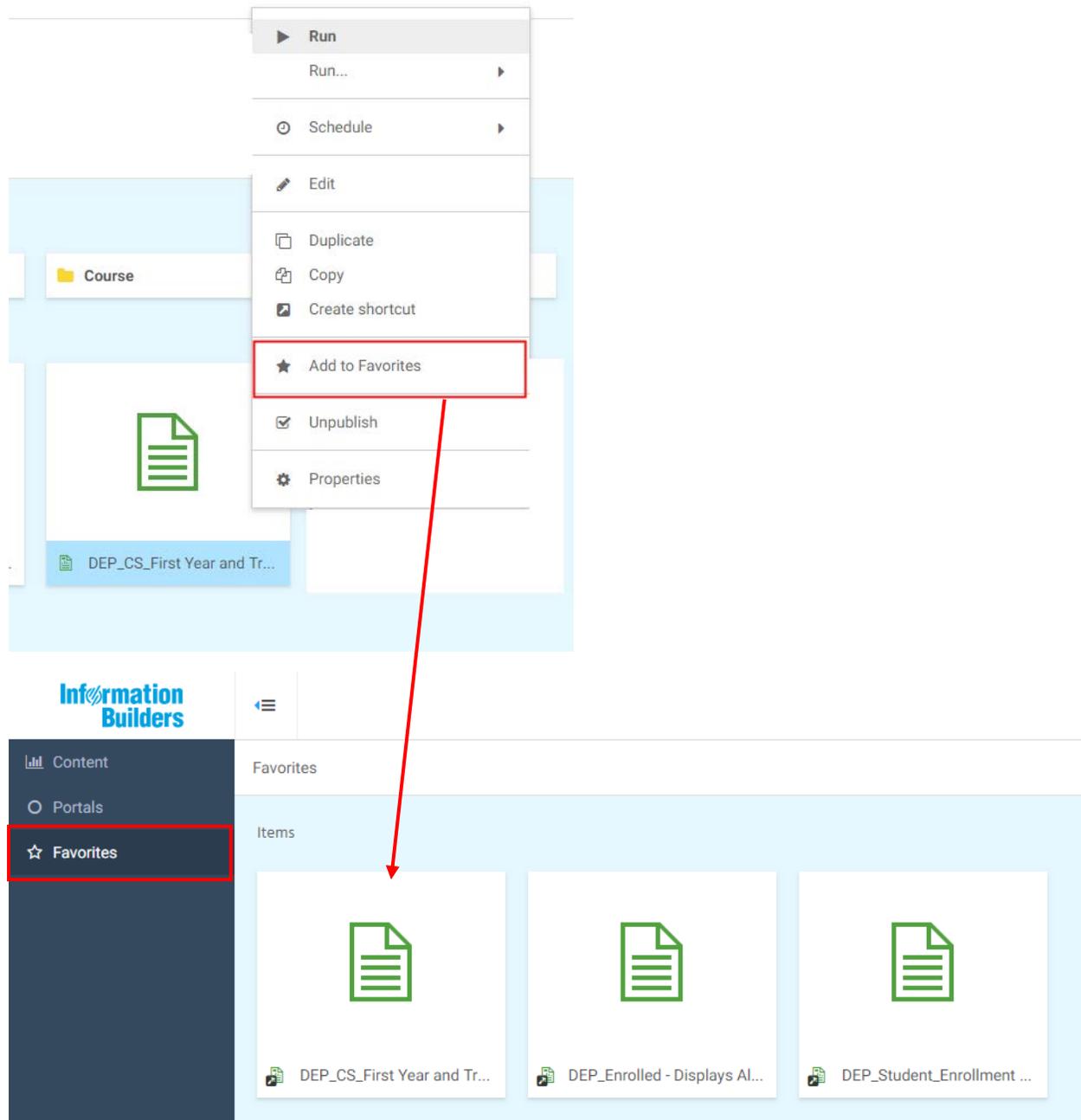
You can click the “bread crumbs” to navigate back to other folders

## Favorites

You can save frequently used reports to your Favorites list for easy access. Double-click Favorites to display reports you've added to your list.

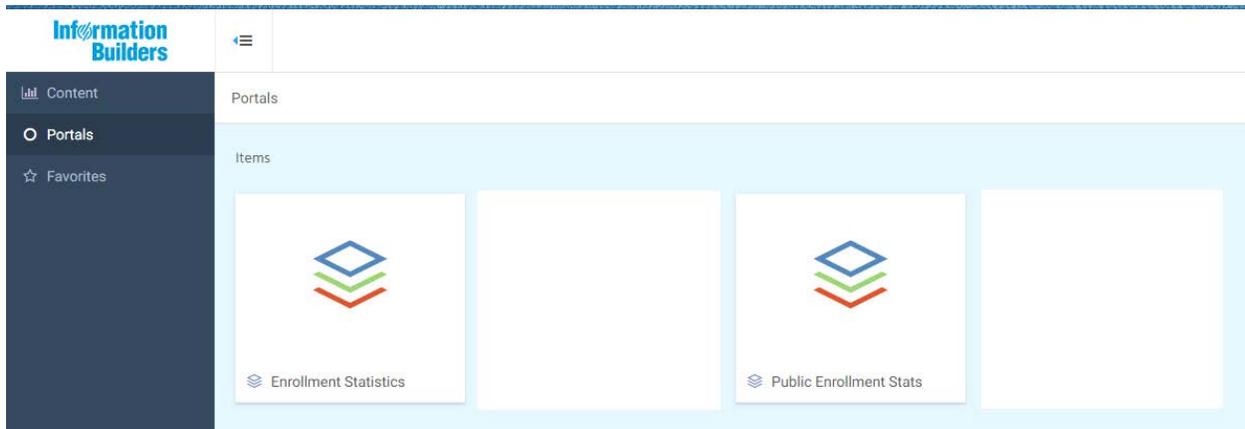
To add a report to your favorites list:

- Right-click the desired report
- Click "Add to Favorites"

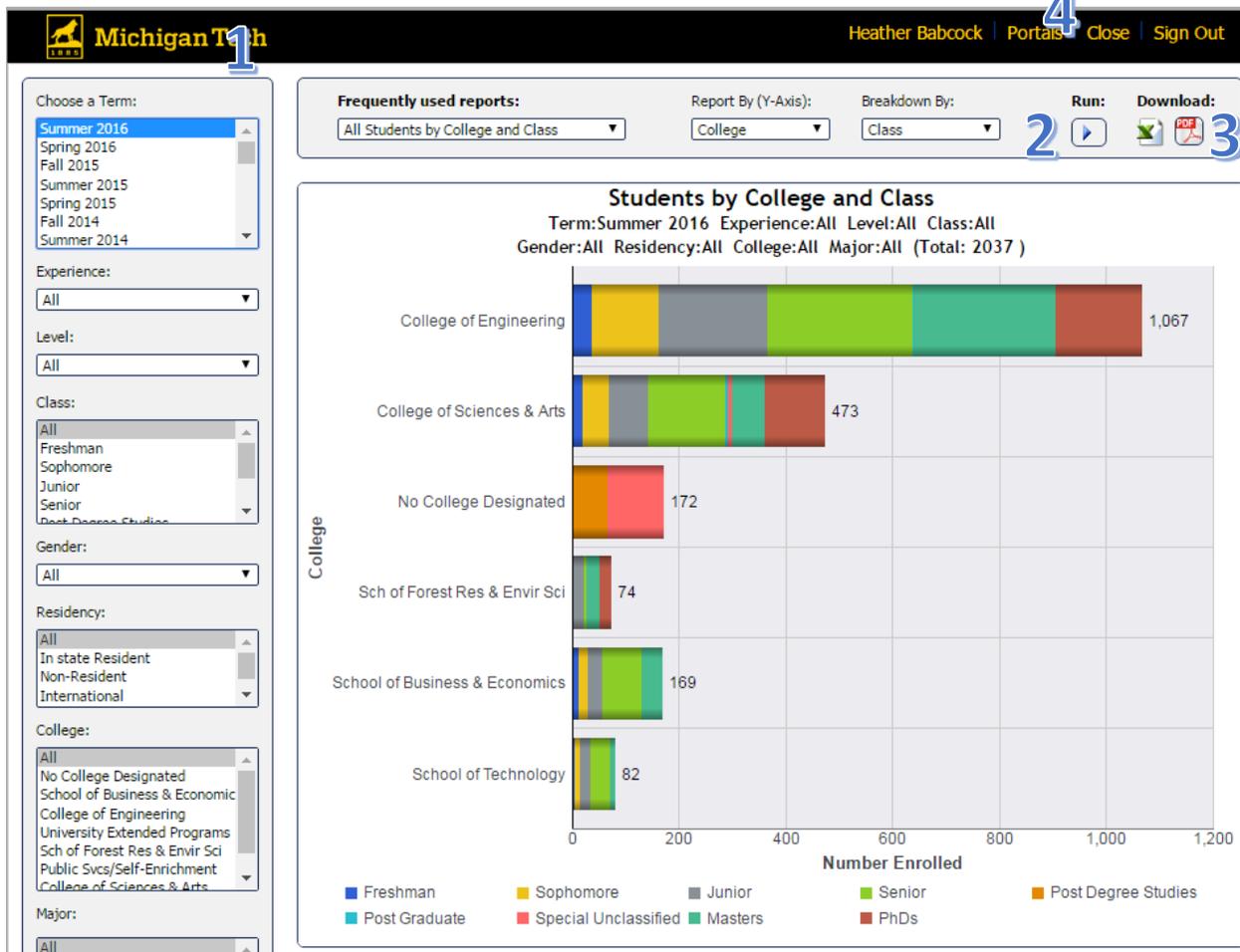


## Portals

The Portals section houses interactive reporting dashboards. This is the new home of the Enrollment Statistics Dashboard. Double-click a portal to open the dashboard.



Below is the Enrollment Statistics Dashboard. Continue to the next page for explanation of the numbered items.

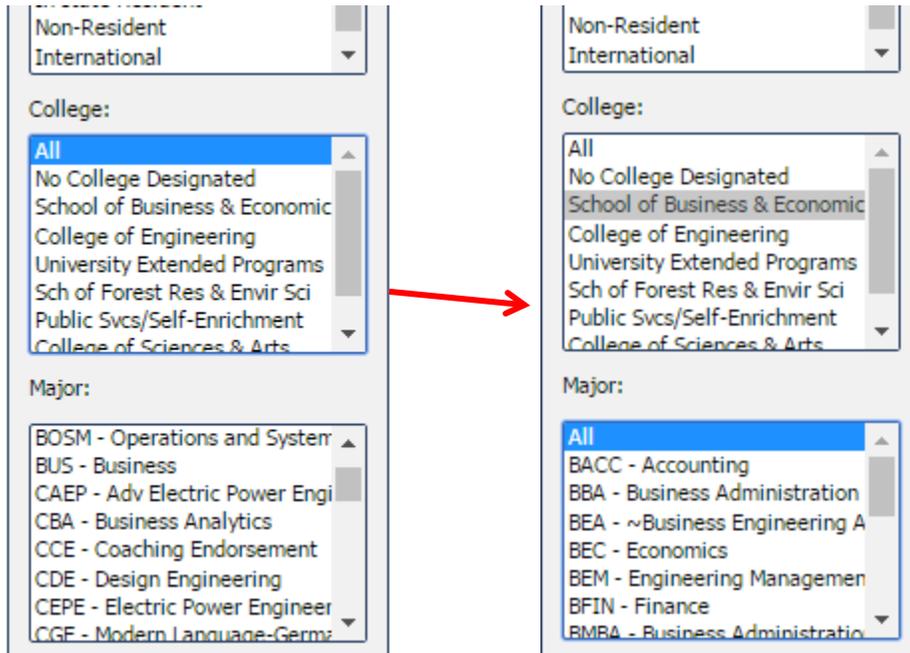


## Enrollment Statistics Dashboard

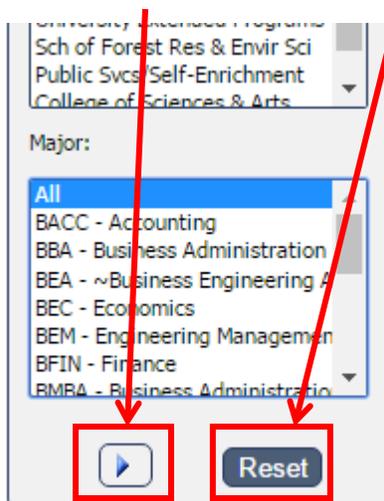
1

The list of parameters on the left-hand side are dynamic and can be adjusted to pull enrollment numbers for a more detailed population. Adjust the parameters as desired, click “Run” and the data will refresh.

For example, if you change the *College* parameter from **All** to **College of Business & Economics** the list displayed in the *Major* parameter is automatically trimmed down to the majors found in the college.



There is a “Run” button and a “Reset” button at the bottom of the parameter list. Click the “Reset” button to change all parameters back to their defaults.



## Run

2

There are two “Run” buttons on the report. One at the top right-hand side and a second located at the bottom of the parameters listed on the left-hand side. Either button will adjust the report display accordingly after you change parameters.

The screenshot shows the Michigan Tech report interface. At the top right, the user name "Heather Babcock" and links for "Portals", "Close", and "Sign Out" are visible. Below the header, there are several dropdown menus for "Frequently used reports", "Report By (Y-Axis)", and "Breakdown By". The "Run" button is highlighted with a red box. Below these are the parameter selection areas for "Choose a Term", "Experience", "Level", "Class", "Gender", "Residency", "College", and "Major". A second "Run" button is also highlighted with a red box at the bottom of the parameter selection area. The main content area displays a horizontal bar chart titled "Students by College and Class" for the term "Spring 2017". The chart shows the number of students enrolled in each college, broken down by class level. The total number of students is 6748.

College	Freshman	Sophomore	Junior	Senior	Post Degree Studies	Post Graduate	Special Unclassified	Masters	PhDs	Graduate	Total
College of Engineering	~400	~400	~400	~400	~400	~400	~400	~400	~400	~400	4,277
College of Sciences & Arts	~200	~200	~200	~200	~200	~200	~200	~200	~200	~200	1,432
No College Designated	~100	~100	~100	~100	~100	~100	~100	~100	~100	~100	99
Sch of Forest Res & Envir Sci	~100	~100	~100	~100	~100	~100	~100	~100	~100	~100	213
School of Business & Economics	~100	~100	~100	~100	~100	~100	~100	~100	~100	~100	379
School of Technology	~100	~100	~100	~100	~100	~100	~100	~100	~100	~100	348

## Download

3

Located on the top right-hand side near the “Run” button. Click the icons to download the report in Excel or PDF format.

The screenshot shows the "Download" section of the report interface. It contains two icons: an Excel spreadsheet icon and a PDF document icon. The "Download" label is highlighted with a red box.

## Close

4 To return to the *Resources Menu*, click “Close” on the top right-hand side.

The screenshot shows the Michigan Tech WebFOCUS interface. At the top right, the user name 'Heather Babcock' is visible next to 'Portal'. The 'Close' button is highlighted with a red box, and a red arrow points from the text above to it. Below the navigation bar, there are filters for 'Choose a Term:' (Spring 2017, Fall 2016, Summer 2016, Spring 2016, Fall 2015, Summer 2015, Spring 2015) and 'Experience:' (All). The 'Frequently used reports:' section shows 'All Students by College and Class' selected. The 'Report By (Y-Axis):' is set to 'College' and 'Breakdown By:' is set to 'Class'. The 'Run:' button is a blue play icon, and 'Download:' options are for Excel and PDF. The main content area displays 'Students by College and Class' for 'Term: Spring 2017', 'Experience: All', 'Level: All', 'Class: All', 'Gender: All', 'Residency: All', 'College: All', and 'Major: All', with a total of 6748 students. A horizontal bar chart is partially visible below the text.

## Searching for Reports

WebFOCUS' Search option allows you to search the titles of reports from the Content section. The *Search* field isn't case sensitive and allows you to enter parts of words, whole words and/or multiple words. You'll see the content shown begin to change as you enter search criteria.

The screenshot shows the Information Builders interface. On the left is a navigation menu with 'Content' selected. The main area shows a search bar with 'dep\_' entered, highlighted by a red box. Below the search bar, a list of report items is displayed, each with a document icon and a title starting with 'DEP\_'. The titles include 'DEP\_Admitted Transfers b...', 'DEP\_All Students Home A...', 'DEP\_Deans List 3.5-4.0 by...', 'DEP\_Online Major Change...', and 'DEP\_Online Major CHANG...'. A red arrow points from the search bar to the next screenshot.

This is a close-up of the search results from the previous screenshot. It shows two report items, each with a document icon and a title: 'DEP\_Online Major Change...' and 'DEP\_Online Major CHANG...'. The search bar at the top of this view shows 'dep\_'. A red box highlights the entire search results area.

## Other Search Options

Use **“Crosswalk” Reports**; Crosswalk reports have been created by report writers to show you the WebFOCUS equivalent of a previous report.

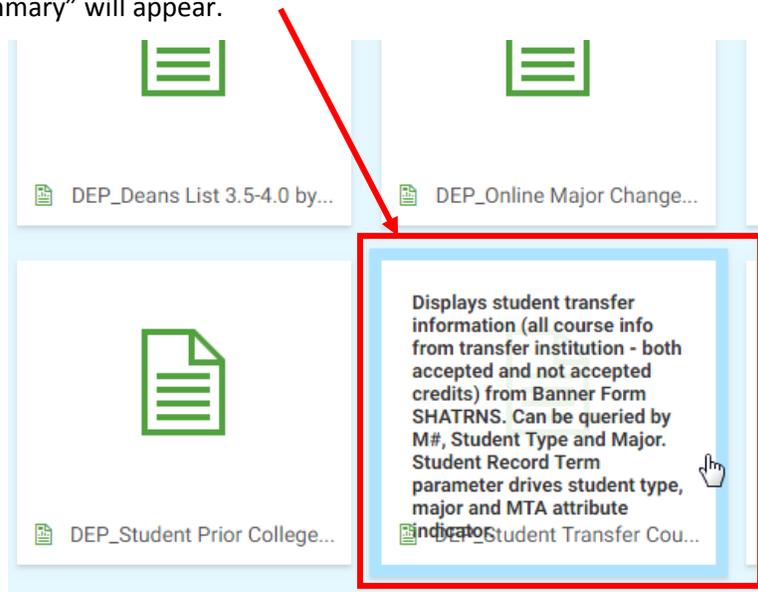
DEP\_REPORT\_CROSSWALK\_new

Note: The folder name listed is nested within the DEPARTMENTAL folder.

Report Type	Oracle Report Group	Discoverer Worksheet	Old Report Name	WebFocus System	Folder	WebFocus Report
New (No Previous Report)				Student	Graduation	GD - Diploma Name Audit
New (No Previous Report)				Student	Graduation	GD - Graduated Students with Academic Standing Issue
New (No Previous Report)			New	Student	Course	DEP_Course info By Term
New (No Previous Report)			New	Student	Course	DEP_Student_Class Roster by Instructor
New (No Previous Report)			New	Student	Enrollment	DEP_Student Enrollment by College
New (No Previous Report)			New	Student	Graduation	DEP_Commencement List UG Home and Mail address-email
New (No Previous Report)			New	Student	Graduation	DEP_Student_Applied for Graduation By College
Discoverer			SYDEGPO003 - Board of Control List	Student	Graduation	GD - Board of Trustees Conferral Report
Discoverer			SYDEP005- Degrees Awarded by Dept	Student	Degrees	DEP_Student_Degrees Awarded by Department w Double_Major_Minor_Conc
Oracle	Degree Services		SYDOR006 - Diploma Address Labels by Date	Student	Graduation	GD - Diploma Address Label List by Date
Discoverer		AP Credit Information	SYGAPC008 - First- Year and Transfers with Computer Science A/AB Scores	Student	Departmental	DEP_CS_First Year and Transfers with A-AB Scores
Discoverer		Degree Services Post-	SYDEGPO001 - Alpha List of Grads BOC	Student	Graduation	GD - Board of Trustees Alpha List of Grads

## Report Properties

From the Content Menu you can view the *Properties* of reports. This is where a summary of the report can be stored by the report writer for your reference. At a glance, hover over the report tile and a portion of the “Summary” will appear.



To view the entire summary, right-click the desired report and click “Properties”.

The image shows a two-part screenshot. The top part shows a list of reports with a right-click context menu open over one report. The menu items are: Edit, Duplicate, Copy, Create shortcut, Add to Favorites, Unpublish, and Properties. The 'Properties' option is highlighted with a red box. A red arrow points from this box to the bottom screenshot. The bottom screenshot shows the 'Properties' dialog box for the report 'DEP\_Student Transfer Course Information'. The dialog has two tabs: 'General' and 'Query Detail'. The 'General' tab is active and contains the following fields: Language (English), Title (DEP\_Student Transfer Course Information), Name (DEP\_Student\_Transfer\_Course\_Information.fex), Summary (Displays student transfer information (all course info from transfer institution - both accepted and not accepted credits) from Banner Form SHATRNS. Can be queried by M#, Student Type and Major. Student Record Term parameter drives student type, major and MTA attribute), Path (IBFS:/WFC/Repository/Student/Departmental/Advisors/...), and Created (Tuesday, May 23, 2017 11:36:45 AM EDT by hbabcock). The 'Summary' field is highlighted with a red box.

DEP\_Online Major Change...

Displays student transfer information (all course info from transfer institution - both accepted and not accepted credits) from Banner Form SHATRNS. Can be queried by M#, Student Type and Major. Student Record Term parameter drives student type, major and MTA attribute

DEP\_Student Transfer Cou...

DEP\_Student\_Advisee Rep...

DEP\_Student Transfer Course Information

General Query Detail

Language English View All

Title DEP\_Student Transfer Course Information

Name DEP\_Student\_Transfer\_Course\_Information.fex

Summary Displays student transfer information (all course info from transfer institution - both accepted and not accepted credits) from Banner Form SHATRNS. Can be queried by M#, Student Type and Major. Student Record Term parameter drives student type, major and MTA attribute

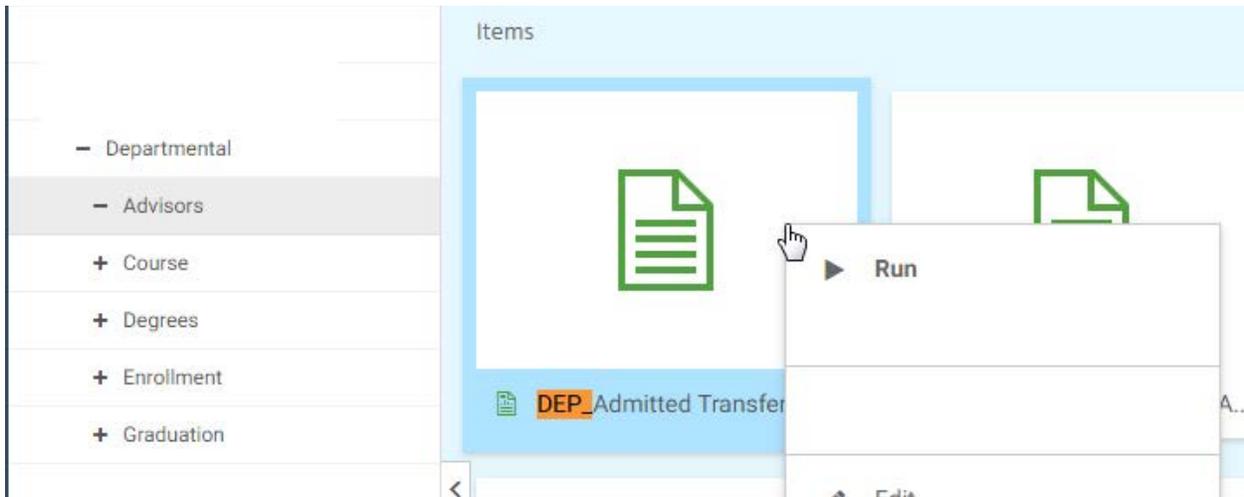
Path IBFS:/WFC/Repository/Student/Departmental/Advisors/...

Created Tuesday, May 23, 2017 11:36:45 AM EDT by hbabcock

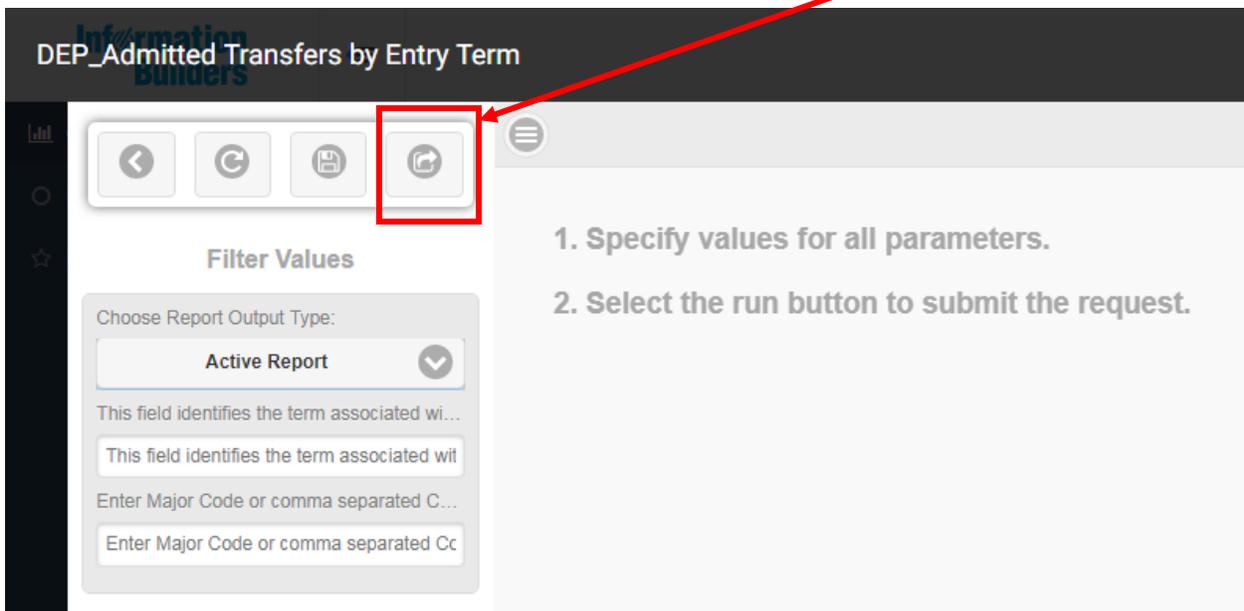
## Running Reports

In the Resources Menu, double-click the displayed folder(s) to drill down into the list of available reports.

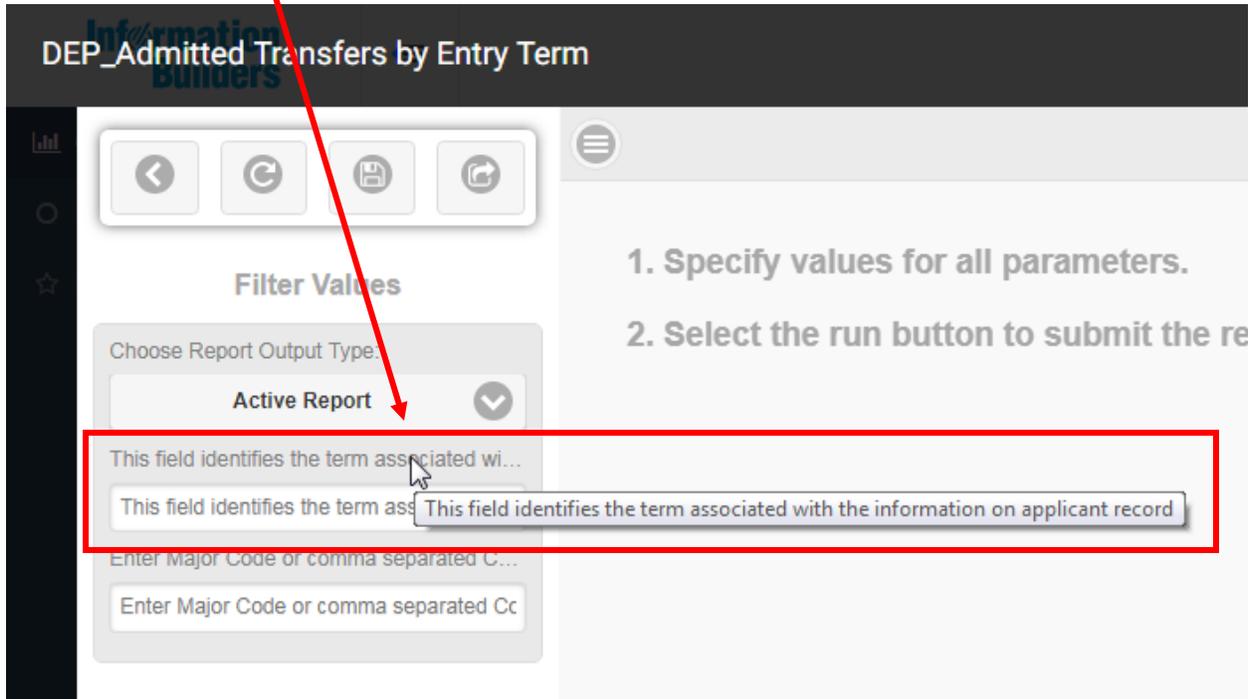
Either double-click the desired report to run it or right-click the report and click “Run”.



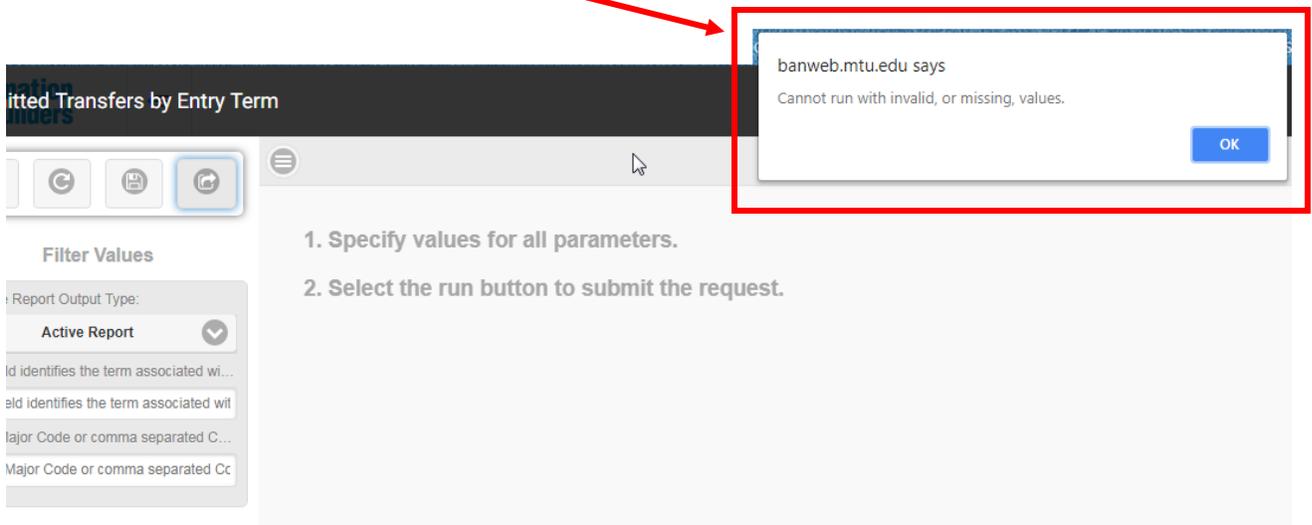
A new window will appear with report parameters to enter. **You must click “Run with Filter Values” to run the report, hitting ENTER will not work.**



**Be mindful of the parameter descriptions.** They will not only list the value to be entered, but occasionally the format in which it should be entered. Hover over the description to see the complete instructions



**A value needs to be entered/chosen in all parameter fields in order to run the report, leaving a field blank will result in an error displayed in the parameter window (similar to what's shown below).**



## WebFOCUS Tips & Tricks

We understand that WebFOCUS has some distinct differences from Discoverer Reports! We have compiled the following list of usage tips and common differences to help you transition smoothly in using WebFOCUS.

### Date Parameters

**Dates in Discoverer:** dd-mmm-yyyy

Ex. 01-JUL-2016

**Dates in WebFOCUS:** mdyy

WebFOCUS is much more flexible in the format it allows you to enter. The date parameters are not case sensitive, you can enter a two or four digit year, comma or no comma, whole month, first three letters of month, or all numbers.

Ex.

9/1/15	9-1-15	
9/1/2015	9-1-2015	
09/01/15	09-01-15	090115
09/01/2015	09-01-2015	09012015
September 1, 2015	September 1, 15	sep 1 16

**Ex. that DO NOT work in WebFOCUS:**

9115

912015

01-SEP-2015

## List Parameters

In Discoverer, most parameters accepted a comma separated list of values.

In WebFOCUS, in order to enter a list of values the parameter has to specifically be set up to accept a list. Lists must be entered with the values surrounded by single quotes and comma separated without spaces.

Ex. 'EME','EEE','BMGT'

If you only need to enter a single value in a parameter that accepts a list, you must still surround the value in single quotes.

The description above & within a parameter field will alert you if you need to enter the values in a specific format.

The screenshot displays the 'DEP\_Student Prior College Information' interface. At the top, there are navigation icons (back, refresh, save, share) and a hamburger menu. Below this is a 'Filter Values' section with a dropdown menu set to 'HTML'. There are two filter fields for 'Student M#' and 'Student Type Code', both with 'All Values' selected and an 'All' checkbox checked. Below these are two 'Student Record Term' fields. A red arrow points from the text above to the first 'Student Record Term' field, which is highlighted with a red box. The text inside the box reads: 'Enter Major Codes ex 'EEE','EME''. To the right of the filter section, there are two numbered instructions: '1. Specify values for all parameters.' and '2. Select the run button to submit the request.'

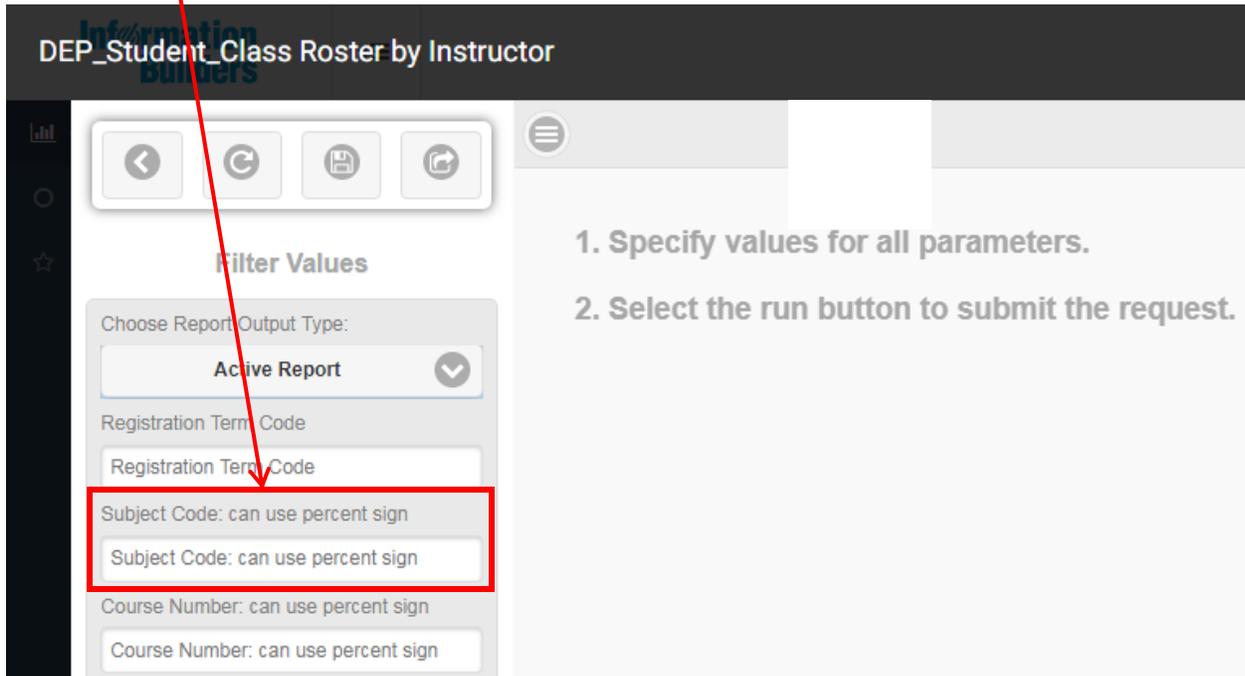
**A % (wild card) cannot be used in a parameter that is set up to accept a list.**

## Wild cards (%) in Parameters

In Discoverer, most fields defaulted to a % if left blank.

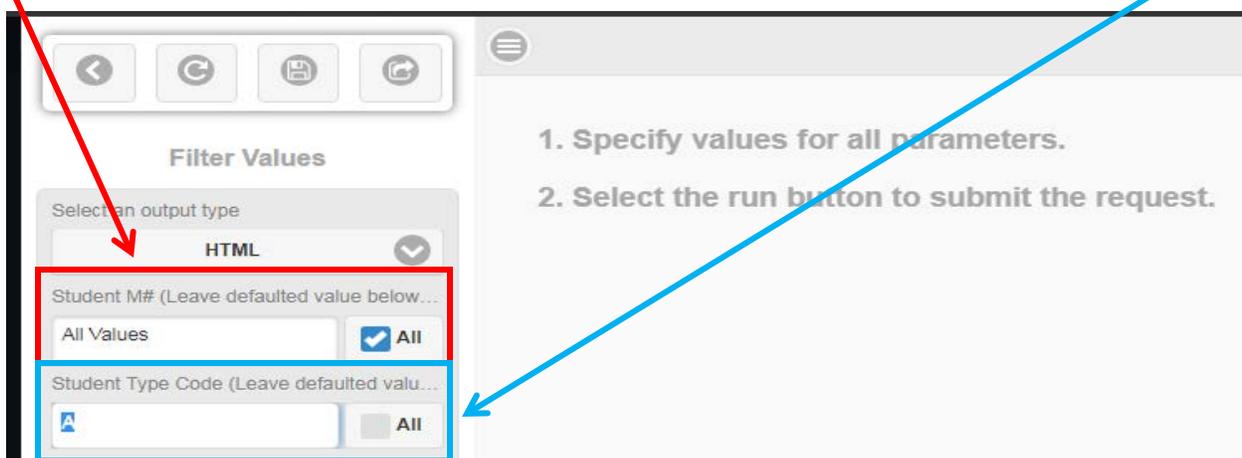
In WebFOCUS, **a field cannot be left blank when running a report.** Similar to the “List”, a parameter must be specifically set up to accept the %.

The description above & within a parameter field will tell you whether or not a % is an accepted value.



In some reports you will see “All Values” as the default value in a parameter field, this indicates what WebFOCUS considers an **Optional Parameter**.

The “All Values” value acts similarly to a % in that, if you leave this value in place the report will return all possible values that exist for that parameter. You can also delete “All Values” and enter a single value in the parameter field. **Remember, there must be a value in the field for the report to run!**



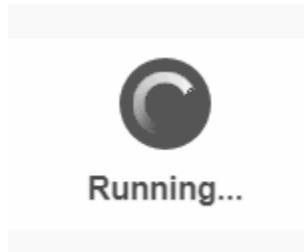
**Extra Tip:** If you clear “All Values” by mistake, you can restore it by clicking *All* to the right of the field.

## Report Runtimes

Most Discoverer reports accessed warehouse data. The data was refreshed once every 24 hours and was trimmed down (in most cases to contain one row of data per student) to help reports run faster and to more easily report on complex BANNER tables.

Most WebFOCUS reports are accessing **live** BANNER data (unless otherwise noted) and *in some cases* may take longer to produce results than their Discoverer equivalents.

The below indicator will display in the report window while your report is generating.

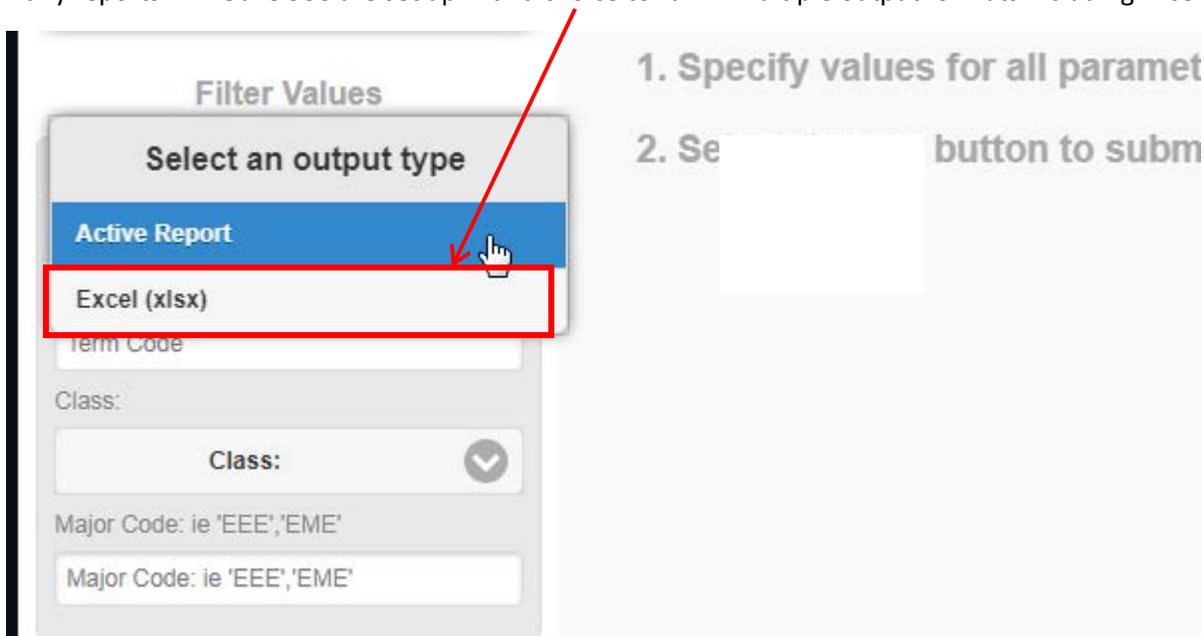


## Sorting & Filtering with Excel

Many Discoverer reports were similar in *how* they were pulling student information. However, they were unique in that there often were college and/or major filters applied to make a report specific to one college or another.

We've moved away from this in WebFOCUS to increase efficiency in report maintenance. This helps us to ensure your reports are up-to-date and running correctly. Multiple copies of similar reports increases the margin for error and/or missed reports when necessary updates to filters or data are needed.

Many reports in WebFOCUS are set up with a choice to run in multiple output formats including Excel.



**Things to keep in mind:**

- Many reports have information in footers which create merged cells below your report data. Either delete the footer rows before sorting/filtering or highlight only the rows with student data, then apply a sort/ filter.

M#	PreferredName	Class	LEVEL CODE	MAJOR	CONCENTRATION	SECOND_MAJOR	SECOND_CONCENTRATION
		SO	UG	EGE			
		SO	UG	EEE			
		SO	UG	ECM			
		SO	UG	EME			
		SO	UG	EBE			

*This report replaces DISCOVERER STUDENT Report - SYGDEP017*

*Created By cynthiam*

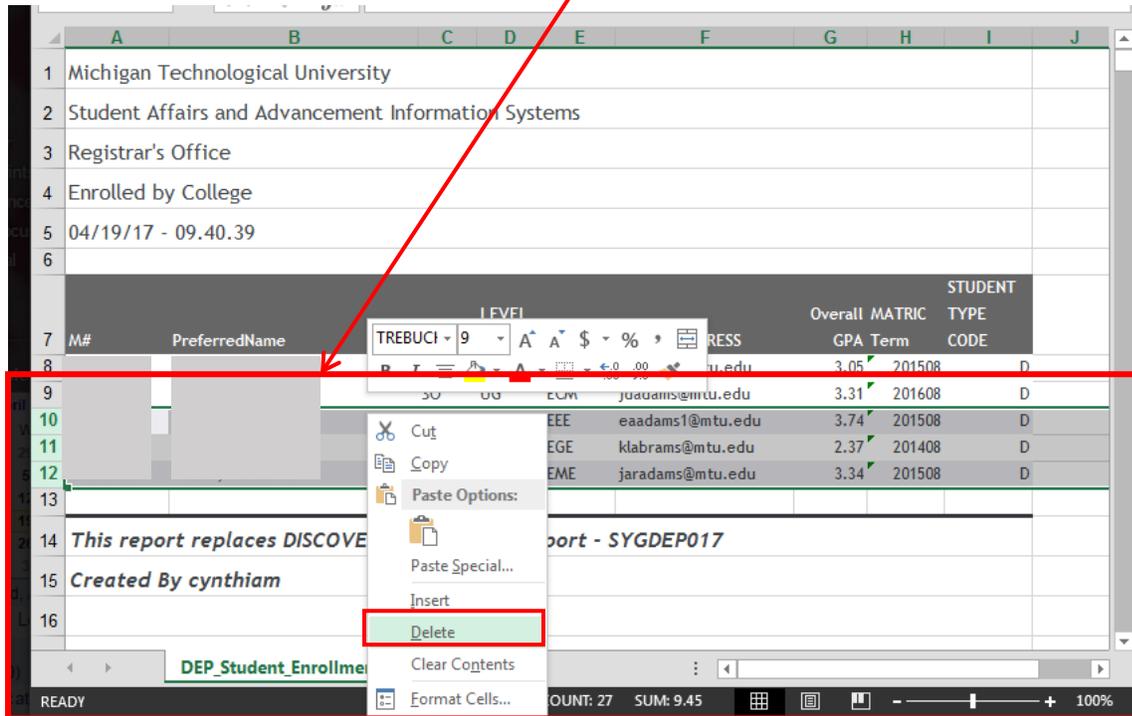
*Confidential*

DEP\_Student\_Enrollment by Coll

READY      AVERAGE: 3.162      COUNT: 59      SUM: 15.81      100%

- You can delete data columns & rows you don't need without having to manipulate the report header/footer rows.

- Highlight rows from the left or columns from the top, right-click and choose delete.
  - Make sure that you select an entire column or row before deleting it to prevent odd shifts in your data.



## Requesting Reports & Reporting Issues

Questions? Contact SAIS – [sais@mtu.edu](mailto:sais@mtu.edu), 7-2151

Requests for new reports, modifications to existing reports, and conversion of past reports should be emailed to [sais@mtu.edu](mailto:sais@mtu.edu) along with reports of any broken reports.