



# Lawson Dashboards

The simple way to get information in Lawson

Version 10 USER GUIDE

FEB 2015

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The Greensboro Information Technology Department is migrating Lawson from on-site servers to the Amazon Cloud. During the process of this conversion we have taken the opportunity to change the way you will access Lawson. When we complete the migration and bring the system up on **Monday, February 16, there will be 2 user access points into the Lawson Applications.**

“**Infor Lawson Ming.le**” is the user interface that will be used by Department Heads and all power users who have responsibility for entering personnel, procurement, and financial transactions, running Lawson reports, and doing more complex queries and uploads to the Lawson database. All users of this interface have been indentified and offered Ming.le training. People who are Ming.le users can also access the Lawson dashboards through this interface.

“**Infor Lawson Dashboards**” allow employees that primarily login to Lawson for purposes of viewing Employee Self Service, Manager Self Service, or select financial reports to be able to view information in a very streamlined and simple fashion. Dashboards offer quick access to information relating to employee pay and benefits, personnel and financials, and custom reporting needs. A few things to note about dashboards:

- From CityNet, go to **My Roles>Employees>My Apps**, click the link “**Infor Lawson Dashboards**” to access the Lawson Dashboards.
- All full-time and part-time benefit-eligible employees will access **Employee Self Service** via a Dashboard. **This does NOT include retiree hire backs or hourly employees.**
- Managers will now be able to access **Manager Self Service** via a Lawson Dashboard.
- Lawson Dashboards are simple as 1-2-3.
  - Step 1: Login to Lawson Dashboards using your network user ID and password.
  - Step 2: Click on the dashboard tab you want to access
  - Step 3: Click on the link to get your information.
- There will be no formal training offered to Dashboard users prior to go-live, other than a simple tutorial link that can be found on CityNet. Click **Help>Infor Lawson & Ming.le**
- Lawson Dashboard security is granted at the dashboard level, module level, and link level. Therefore, your view will be dependent on the access granted to you based on your business role in the organization.

**Please note: Lawson Dashboard development will occur on a routine basis to support user business requirements. Please contact your ERP Business Analyst if you have any reporting suggestions. A screen print of the various Lawson dashboards will appear next.**

# Employee Self Service Dashboard

The ESS dashboard is specifically designated for all benefit-eligible full-time and part-time employees to view pay, benefits, and personal information.

## Dashboards

Tools Employee Tools Security Dashboard Finance Manager Self Service HR Management Tools Departmental Reporting Finance Inquiry **Employee Self Service**

Employee Self Service +

**Pay** ^ ⚙

- Paystub +
- W-2s +
- Direct Deposit +
- Pay Check Detail +
- Pay Rate History +
- Payment Modeling +
- Tax Withholding Changes +
- Annual Wage Summary +

**Life Event Changes** ^ ⚙

- Address Changes +
- Adoption +
- Birth +
- Divorce +
- Legal Separation +
- Marriage +
- Spouse Employment +

**My Emergency Contacts** ^ ⚙

My Emergency Contacts +

### Emergency Contacts

Contacts

To add an emergency contact, click on the Add button.

To change, delete or view additional detail for contacts shown below, click on a name.

Name	██████████
Relationship	Dad
Cell Telephone	██████████
Home Telephone	██████████
Work Telephone	██████████

**Personal Information** ^ ⚙

- My Dependents +
- Employee Inquiry +
- Job Profile +
- Leave Detail +
- View Certifications +
- Training History +

**Employment Information** ^ ⚙

- Personnel Policy Manual +
- Employee Finder +
- Your Benefits Assistant +

**Benefits** ^ ⚙

- Healthcare Providers +
  - United HealthCare +
  - Dental Benefit Service +
  - Flex Benefit Claims (Flores) +
- Beneficiary Changes +
- My Current Benefits +
- Benefits Handbook 2015 +
- Open Enrollment (October 1- October 31 only) +
- NCLGERS Calculator +

# Manager Self Service Dashboard

The **MSS Dashboard** is primarily for management to view information on their direct reports. If a manager or supervisor does not see their Manager Self Service dashboard, it generally indicates that they do not have the manager self service role tied to their Lawson security. If a manager/supervisor would like to request the Manager Self Service role, direct them to their Departmental Lawson Account Approver to submit a Lawson Security Request form to the Enterprise Solutions division.

**Dashboards**

Tools Employee Tools Security Dashboard Finance **Manager Self Service** More...

Manager Self Service +

My Team's Leave +

- Leave Balance Inquiry Report +
- Leave Usage Report - All Direct Reports +
- Leave Usage Report - Individual Employee +

Employment Information +

- Company Property +
- Employee Pay History Report +
- Employee Demographic, Position and Compensation Reports +

Management Applications +

- JobBlox - Job Description Maintenance +
- Council Agenda's (Legistar) +
- MAP Navigator +
- Merit Compensation +

HR Reporting +

- Overtime Monitoring +
- Vacancy Report +
- 1000 Hour Roster Monitoring Report +
- 1000 Hour Roster Monitoring Report for Coliseum Staff +

Employee Dates

**Employee Dates**




Dates

Employee Name	Birthday	Hire Date	Service Date	Length of Service (Years/Months)
Steven B. Averett				1 10
Karen B. Bowen				6 3
Ja'Tia L. Brown				13 10
Vanessa J. Strachan				27 4
Kenneth W. Thimmeson				6 6

Direct Reports

**Direct Reports**

Direct Reports of Christine A. Hofer

	Steven B. Averett	Personnel Action	Emergency Contacts	Additional Contact Numbers	Direct Reports
	Karen B. Bowen	Personnel Action	Emergency Contacts	Additional Contact Numbers	
	Ja'Tia L. Brown	Personnel Action	Emergency Contacts	Additional Contact Numbers	

**These NEW modules have been provided to assist managers in quickly accessing commonly used tools & key HR management reports.**

# Employee Tools Dashboard

All Employee Self Service (ESS) users have access to this Lawson Dashboard. At minimum they should see the Administrative Tools, Business Travel, and Best Practice....modules.

**Only Departmental HR Liaisons have access to this module**

**All Employee Self Service (ESS) users have access to these 3 modules**

**Lawson Security dictates who see these 3 modules**

The screenshot shows the Lawson Employee Tools Dashboard with the following modules and sub-modules:

- Administrative Tools**
  - Employee Look up tool +
  - Employee Look up (past and present employees) +
  - User ID Lookup for Employees +
  - Budget Adjustment Request +
  - Bank of America P-card Works system +
  - Office Depot Supplies +
- Business Travel**
  - Travel Settlement Guidelines +
  - 2015 Travel Request & Settlement form +
  - Calculate Mileage with GOOGLE maps +
  - Mileage Reimbursement Policy +
  - Mileage Reimbursement Form +
- Best Practice: Managing Public Information**
  - Municipal Records Retention and Disposition Schedule +
  - General Statute § 132-1: Public Records Law +
  - Managing Public Records (45 Minute Tutorial) +
  - Guide to Managing your inbox as public record +
  - Best Practice Video on file naming (2min) +
- Contact Information Updates**
  - Employee's Emergency Contact Entry +
  - Telephone Entry +
- My Lawson Forms**
  - Company Property +
  - Employee Certifications +
  - NT Login +
- Timekeeper**
  - Kronos +
  - Leave Detail +
  - Leave and Time Entry +
  - Speed Leave and Time Entry +
  - View Employee Leave Transaction Detail +
  - View Leave Plan Transactions +
  - View Leave Transactions +
- HR Liaison Reports**
  - 1,000 Hour Monitoring Graph +
  - Benefit Coverage Listing +
  - Coliseum 1,000 hr monitoring report +
  - Employee Data Report for Benefit Eligible Employees +
  - FMLA Eligibility and Status Report +
  - Leave Entry Audit Report +
  - Overtime Report +
  - Personnel Action Audit Report +
  - Position Summary Report +
  - Promotional Activity +
  - Retirement Eligibility Report +
  - Roster Employees by Dept +
  - Telephone Directory +
  - Time Entry Audit Report +
  - Vacancy Report +

# Finance Dashboard

The **Finance Dashboard** is designated for employees in the Finance Department to access their custom reports.

## Dashboards

- Tools
- Employee Tools
- Security Dashboard
- Finance**
- Manager Self Service
- HR Management Tools
- Departmental Reporting
- Finance Inquiry
- Employee Self Service

Finance +

### Collections



- PARKING TICKET REVENUE (GL Trans) +
- BILLING AMOUNTS BY FY & PROCESS LEVEL (1) +
- --- SCHEDULED MONTHLY REPORT 1 +
- BILLING AMOUNTS BY QTR & PROC LEVEL (1A) +
- CUMULATIVE COLLECTION AMOUNTS BY PROC LVL (2) +
- CUMULATIVE COLL. AMOUNTS BY PROC LVL (DRILLDOWN 2A) +
- --- SCHEDULED MONTHLY REPORT 2a +
- CUMULATIVE BILLINGS BY DISPUTE CD (3) +
- --- SCHEDULED MONTHLY REPORT 3 +
- WEEKLY DELINQUENT ACCOUNT REGISTER +
- --- SCHEDULED MONTHLY DELINQ ACCT REGISTER +

### Collections - No Credits/Debits



- BILLING AMOUNTS BY FY AND PROCESS LEVEL (1) +
- ---SCHEDULED MONTHLY REPORT 1 +
- BILLING AMOUNTS BY QTR & PROCESS LEVEL (1A) +
- CUMULATIVE COLLECTION AMOUNTS BY PROC LVL (2) +
- CUMULATIVE COLL. AMOUNTS BY PROC LVL (DRILLDOWN 2A) +
- ---SCHEDULED MONTHLY REPORT 2A +
- CUMULATIVE BILLINGS BY DISPUTE CD (3) +
- ---SCHEDULED MONTHLY REPORT 3 +

### Treasury



- DAILY INVOICE ENTRY BALANCING RPT +

### Financial Reporting



- GOFUND1 Final and Revised Original Budgets +
- GOFUND2 Current and Prior Yr Actuals +
- Employees by Building Location +
- Payroll by WC Code for a Specified Time Period +

### Graphic Services



- Postage Revenue Report +

# Departmental Reporting Dashboard

All Employee Self Service (ESS) users have access to this Lawson Dashboard; however, most users will only see a message that reads, “This dashboard may appear empty unless you or your department has requested specific content to be published here...” If a user needs access to this dashboard, direct them to their Departmental Lawson Account Approver to submit a Lawson Security Request form to the Enterprise Solutions division.

My Dashboards My Reports

Dashboards

Tools Employee Tools Security Dashboard Finance Manager Self Service HR Management Tools **Departmental Reporting** Finance Inquiry Employee Self Service

Departmental Reporting +

Message Center

This dashboard may appear empty unless you or your department have requested specific content to be published here. Access is granted based on departmental security clearance.

<p>HR Administration</p> <ul style="list-style-type: none"> <li>Leave Audit Report +</li> </ul>	<p>Water Resources Reports</p> <ul style="list-style-type: none"> <li>Vacancy Report +</li> <li>NSF Transactions Report +</li> <li>Lawson Security, Dept Audit Report - Detail +</li> <li>Lawson Security, Dept Audit Report - XLS Export +</li> </ul>	<p>Parking Reports</p> <ul style="list-style-type: none"> <li>CMO &amp; Directors Parking Eligibility Report +</li> <li>Parking Eligibility Report for Managers +</li> <li>Permanent ADA Parking +</li> <li>Fund 543 Parking Revenue +</li> <li>Posting Acct Detail for Fund 543 Parking Revenue +</li> <li>Collection Amounts by PL 20204 - No Credits +</li> </ul>
<p>Public Safety Reports</p> <ul style="list-style-type: none"> <li>Fire Department Vacancy Report +</li> <li>Fire Pay/Time Entered Audit Report +</li> <li>Police Fund 220 Fringe Report +</li> <li>Police Special Events Report +</li> <li>Police Vacancy Report +</li> <li>Police Staff Inspections Demographics +</li> <li>GM-911 - REGF Wages +</li> </ul>	<p>Parks &amp; Rec Reports</p> <ul style="list-style-type: none"> <li>NE Timesheet +</li> <li>Vacancy Report +</li> </ul>	<p>Library Reports</p> <ul style="list-style-type: none"> <li>Vacancy Report +</li> </ul>
<p>Communications</p> <ul style="list-style-type: none"> <li>Employees without Emails +</li> <li>New Employees Citynet Listing +</li> <li>Vacancy Report - Communications +</li> </ul>	<p>Budget Reports</p> <ul style="list-style-type: none"> <li>Budgeted and Filled Positions by Department +</li> <li>Budgeted and Filled Positions by Fund +</li> <li>Budgeted and Filled Positions by Fund by Dept +</li> <li>Budget Department - Salary &amp; Benefits Analysis +</li> </ul>	
<p>Information Technology Reports</p> <ul style="list-style-type: none"> <li>Expense Transaction Listing +</li> <li>Outstanding Encumbrance Listing +</li> </ul>	<p>Department Reports</p> <ul style="list-style-type: none"> <li>HCD Expense Transactions +</li> <li>Coliseum - MTD Actuals for Coliseum Fund 521-XLS Export +</li> </ul>	



# Finance Inquiry Dashboard:



This is a new Lawson Dashboard created specifically for non-power users who previously accessed the Finance bookmark through the Lawson portal. Users with security access to this dashboard will be able to inquire on accounting, purchasing, requisitions, or vendor-related information. All users who are designated to receive the Monthly Budget & Cost of Operations (RW100) report will now have the ability to access both current and historical versions of these reports on the Finance Inquiry dashboard.

**Dashboards**

Tools Employee Tools Security Dashboard Finance Manager Self Service HR Management Tools Departmental Reporting **Finance Inquiry** Employee Self Service

Finance Inquiry +

Message Center Budget and Cost of Operations Statement

This dashboard may contain links that some users may not have the security clearance to access. Security clearance is requested through your departmental Lawson Security Account Approver.

**Accounting Inquiry**

- Account Analysis +
- Fund Sufficiency Analysis +
- CDR Activity Analysis +

**Purchasing Inquiry**

- PO-Contract Inquiry +
- PO-Contract Status +
- PO-Contract Browse +
- Check # Inquiry +
- Check Search by PO-Contract +
- PO Status by Accounting Unit +
- PO Receiving +

**Requisitions**

- Special Item Requisition +
- Requisitions Inquiry +
- Requisitions Detail Inquiry +
- Requisitions by Location +

**Vendor Related Information**

- Vendor Inquiry +
- Vendor Agreements +
- Vendor Invoices and Payments +

**Budget and Cost of Operations Statement**

- I.T. Monthly Budget and Cost of Operations Statement +
- I.T. Monthly Budget and Cost of Operations - Historical +
- Coliseum Monthly Budget and Cost of Operations Statement +
- Coliseum Monthly Budget and Cost of Operations Statement - Historical +
- ODC Monthly Budget and Cost of Operations Statement +
- ODC Monthly Budget and Cost of Operations Statement - Historical +
- Bond Funds Monthly Budget and Cost of Operations Statement +
- Bond Funds Monthly Budget and Cost of Operations Statement - Historical +
- Budget and Evaluation Monthly Budget and Cost of Operations Statement +
- Budget and Evaluation Monthly Budget and Cost of Operations Statement - Historical +
- Cemeteries Monthly Budget and Cost of Operations Statement +
- Cemeteries Monthly Budget and Cost of Operations Statement - Historical +
- Legislative Monthly Budget and Cost of Operations Statement +
- Legislative Monthly Budget and Cost of Operations Statement - Historical +
- Employee Benefits Assoc. Monthly Budget and Cost of Operations Statement +
- Employee Benefits Assoc. Monthly Budget and Cost of Operations Statement - Historical +
- Engineering and Inspections Monthly Budget and Cost of Operations Statement +
- Engineering and Inspections Monthly Budget and Cost of Operations Statement - Historical +
- Field Operations - Env. Services Monthly Budget and Cost of Operations Statement +
- Field Operations - Env. Services Monthly Budget and Cost of Operations Statement - Historical +
- Field Operations Dept. Monthly Budget and Cost of Operations Statement +
- Field Operations Dept. Monthly Budget and Cost of Operations Statement - Historical +
- Equipment Services Monthly Budget and Cost of Operations Statement +
- Equipment Services Monthly Budget and Cost of Operations Statement - Historical +
- ERP Monthly Budget and Cost of Operations Statement +
- ERP Monthly Budget and Cost of Operations Statement - Historical +
- Finance Dept Monthly Budget and Cost of Operations Statement +
- Finance Dept. Monthly Budget and Cost of Operations Statement - Historical +
- Fire Dept. Monthly Budget and Cost of Operations Statement +
- Fire Dept. Monthly Budget and Cost of Operations Statement - Historical +
- Graphic Services Monthly Budget and Cost of Operations Statement +
- Graphic Services Monthly Budget and Cost of Operations Statement - Historical +
- GTA Monthly Budget and Cost of Operations Statement +
- GTA Monthly Budget and Cost of Operations Statement - Historical +
- Human Resources Monthly Budget and Cost of Operations Statement +
- Human Resources Monthly Budget and Cost of Operations Statement - Historical +
- Legal Dept. Monthly Budget and Cost of Operations Statement +
- Legal Dept. Monthly Budget and Cost of Operations Statement - Historical +
- Libraries Monthly Budget and Cost of Operations Statement +
- Libraries Monthly Budget and Cost of Operations Statement - Historical +
- Executive Monthly Budget and Cost of Operations Statement +
- Executive Monthly Budget and Cost of Operations Statement - Historical +

# HR Management Tools Dashboard



The HR Management Tools Dashboard is for employees in the Human Resources department to access their customized reports.

Dashboards

Tools Employee Tools Security Dashboard Finance Manager Self Service **HR Management Tools** Departmental Reporting Finance Inquiry Employee Self Service

HR Management Tools +

- Administration
  - City EEO Statistical Data +
  - Employee Lookup Tool [Q](#) +
  - Financial Report (M&O and Personal Services Accts) +
  - Budget & Cost of Operations -- Fund 684 +
  - Retirement Eligibility Report +
  - Posting Acct Detail Inquiry -- Fund 684 +
  - Position Summary Report +
  - Turnover Statistics +
- Benefits
  - Benefits Utilization Report +
  - Dependents Covered on Dental Plan Listing +
  - Dependents over Age 26 with Insurance +
  - Domestic Partner Check List +
  - Domestic Partner Tax Calculations +
  - Employee Lookup Tool [Q](#) +
  - Health, Dental, Vision Coverage Report +
- Compensation/HRIS
  - Benefit-Eligible Employee Data +
  - Department's Promotional Activity +
  - Leave Entry Audit Report +
  - Personnel Action Audit Report +
  - Personnel Transaction History-Summary +
  - Time Entry Audit Report +
  - Zone Analysis Report +
- Employee Relations
  - Employee Lookup Tool [Q](#) +
  - ER OD & Grievance Listing (for ER Only) +
- Employment
  - Departmental Termination Count +
  - Employee Lookup Tool [Q](#) +
  - Roster Employees by Dept +
  - Vacancy Report +
  - Vacancy Report (Bar Graph Included) +
- Health & Safety
  - Driver's License Report +
  - Employee CDL Random Listing +
  - FMLA Eligibility and Status Report +
  - Summary of Wages Paid by WC Code +
- Legal & Compliance
  - 1000 hr monitoring rpt +
  - Approaching/Exceeding 1,000 Hrs +
  - Coliseum 1000 hr monitoring report +
  - Overtime Report +

Monthly Turnover Report (Pie Chart)

**Citywide Separation Report Detail**  
 This report includes terminated employees for: February 2015  
[Click on Chart to Drill Down to further detail](#)