

Log In process:

- Log into the Contivity VPN Client
- Launch Internet Explorer
- Access the www.usnhgateway.org web page
- Click on USNH Finance
- Click on [WebIntelligence Finance Reporting](#)
- Click on the Log In button
- Enter your Web Intelligence username and password
(Note: use CAPITAL letters for username)

MAIN MENU

1 – Corporate Documents: Documents that include USNH Banner Finance data and that have been saved in a centralized location by the USNH Central Librarian. You may access these documents and run reports based on specified criteria. Always click on Refresh List to ensure the most up-to-date list of available documents.

2 – Personal Documents: Documents that you have saved from your Inbox or the Corporate Documents to your personal storage area, where only you have access. You can refresh, send and delete any of these documents.

3 – Inbox Documents: Documents that have been sent to you by *other WebIntelligence users*. You can refresh, send, save, or delete any of these documents. (Note: not associated with any email system. Download data to Excel to email to a non-WebI user. Always click on Refresh List to ensure the most up-to-date list of available documents.

4 – Create Documents: This option is only available for those users who have been designated as Web Developers.

5 – Search: Search for documents on the Corporate, Inbox or personal documents pages by date, document name, author, or keyword(s). You can select the sort order. (p. 17-19)

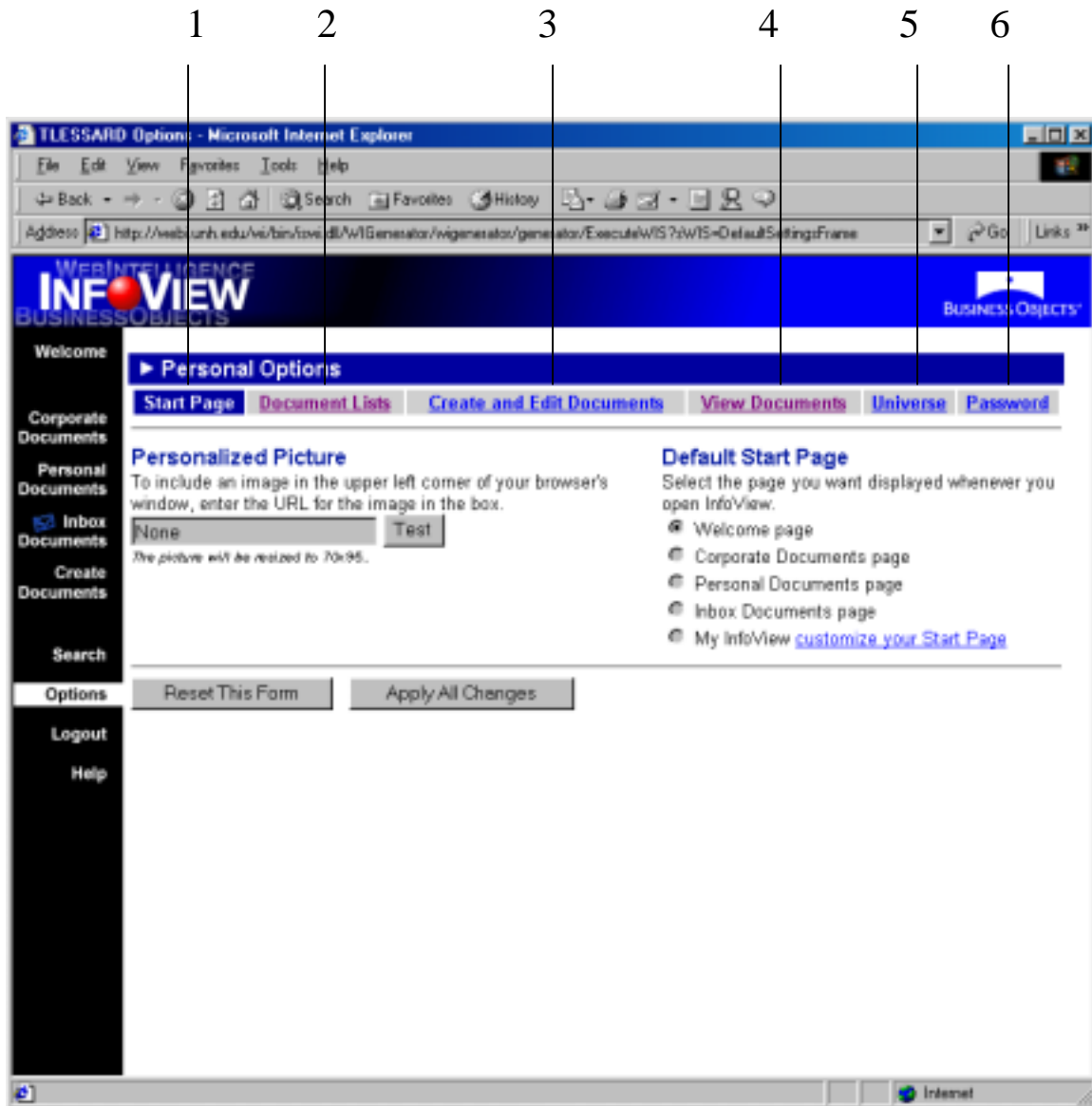
6 – Options: Set your personal preferences such as:

- setting default start page (p.23)
- choosing document lists (p.25)
- view documents and password (p.27)

7 – Logout: Use this to end your WebIntelligence session. (p.29)

8 – Help: On-line user help for WebIntelligence. When you choose this option, a new window in your browser will open and provide access to an extensive on-line user's manual. Content is case-sensitive. (p.13)

OPTIONS MENU



- 1 – **Start Page:** Select a page from the default START PAGE list
- 2 – **Document Lists:** Choose an expanded or compact listing of the documents, your default personal category, and/or the refresh frequency for the Corporate and Inbox document lists
- 3 – **Create and Edit Documents:** Only for use by Web Developers
- 4 – **View Documents:** Choose the view format of your Corporate Documents
- 5 – **Universe:** Choose an expanded or compact listing of the available Universes
- 6 – **Password:** Change your WebIntelligence password

ACCESS AND PRINT REPORTS

Step 1 - Log In

- Connect the Contivity **VPN Client**
- Launch **Internet Explorer**
- Access the www.usnhgateway.org web page
- Click on **USNH Finance**
- Click on [WebIntelligence Finance Reporting](#)
- Click on the **Log In** button
- Enter your Web Intelligence **username and password**
(*Note: use CAPITAL letters for username*)

Step 2 - Set your Options <optional>

- Click on **Options** from the main menu located along the side of the left pane.
- Set your preferred view by clicking on **View Documents** and then clicking on the radio button next to your choice, **HTML** or **Enhanced** or **PDF Acrobat**. Click on **Apply All Changes** to save your selection (p.25). [*Use HTML for EXCEL*]
- Change your password by clicking on **Password**. Enter your current and new password at the respective prompts. Click on **Change Password** to save (p.27).

Step 3 - Select a location and a report (p.15)

- Click on **Corporate Documents** to access the standard USNH reports. (Note: If the list of documents does not appear, click on the small triangle to access the drop down box. Click on the first “All categories” selection to view the list.)
Click on the title of the document that you wish to use.
- Click on **Personal Documents** to access the documents that you have saved from your Inbox or the Corporate Documents to your personal storage area.
- Click on **Inbox Documents** to access the documents that have been sent to you by *other WebIntelligence users*.

Step 4 - Search for your data and print

- Click on **Refresh**, located in the upper right corner of the top menu to access the dialog box with the prompts for refreshing your search criteria. **Enter your search data** (Caps). Click on **Run Query** button to retrieve results (p.35). Click on **File** on the browser’s menu bar and then **Print** for HTML, or the **printer icon** on either the Viewer toolbar for Enhanced or the Acrobat Reader toolbar for PDF.

Step 5 - Select another report or **Logout** to end the WebIntelligence session (p.29).