

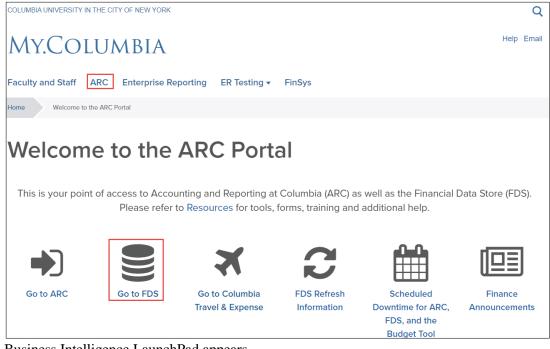
The FDS (Financial Data Store) On Demand Reports interface is Columbia's custom interface for running FDS reports. The interface provides a number of features such as retained parameter values, visual feedback on required fields and the ability to launch multiple reports in parallel which enhance reporting productivity and usability.

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Accessing FDS

From the My Columbia page, click on the ARC link, then click on the Go to FDS icon:



Business Intelligence LaunchPad appears.



The Business Intelligence (BI) LaunchPad

You can create Categories and designate Categories to reports in order to organize them as desired.	different s	bs to quickly n ections of the using the scrol	Home page	Documents	e the Currentl dropdown to een open docu	Use the Documents tile to view a comprehensive list of all the reports for which you have access.		
	CONVERSION DESCRIPTION		BI Launch Pad 🗸					
Use the Folders tile to access	Home Favorites	Recent Documents	Recently Run Appli	cations			Use the BI Inbox tile to access	
folders that contain and organize all the reports for which you have access.	Folders	Categories	Documents	BI Inbox	Instances	Recycle Bin	the documents and alerts you have received from other users.	
	•		1		55	Ŵ		
You can add tiles for your frequently used Folders and Reports to Favorites for quick	Favorites							
access. Cob Analytics and FDS on Demand Reports are	COB Analytics Aug 28, 2020 10:37 AM	FDS On Demand Reports Sep 20, 2022 4:30 PM					Use the Instances tile to view a list of all the Scheduled	
automatically included	€ii ★ Felder	Crystal Reports 2020					Instances and status of the reports you scheduled.	
Recent Documents contain	Recent Documents							
Reports that you recently ran.	FDS On Demand Reports Sep 20, 2022 4:30 PM	Chartfield Summary Statement Sep 19, 2022 5:08 PM	Trial Balance by Account Detail Sep 19, 2022 5:08 PM	Sponsored Project Financial - Summary Sep 21, 2022 9.23 AM	FDS On Demand Reports Nov 18, 2018 4:30 PM			
	Crystal Reports 2020	Crystal Reports 2020	Crystal Reports 2020	Crystal Reports 2020	Hyperlink			
Recently Run will contain tiles			View All Recent Documents					
for documents of Scheduled	Recently Run							
Instances that have recently run.	No items are currently a	vailable. You will see the re	acently run documents her	re.				

Running FDS On Demand Reports

1. Click the **FDS On Demand Reports** tile. (*You can also navigate to the* Folders *tile* > Public Folders > FDS On Demand Reports *folder* > FDS On Demand Reports.)



The FDS On Demand Reports page appears.

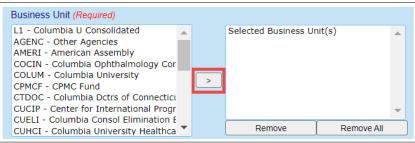
	· · · · · ·	
FDS Folder/Report S	election: ChartField Statements	Department Summary Statement
Selected FDS Folder	/Report: ChartField Statements/Department Sur	Select a report On Bank Account Reconciliation Chartheld Detail Statement
Time Period	Fiscal Year (Required) Account	Chartfield Detail Statement - Printable ng Chartfield Transaction Statement Chartfield Transaction Statement - Printable
80/Fund	AGENC - Other Agencies AMERI - American Assembly COCUN - Columbia Ophthalmology COLUM - Columbia Ophthalmology CPMCF - CPMC Fund CUCIP - Center for International Pr CUELI - Columbia Consol Eliminati CUHCI - Columbia Consort Eliminati	COSTAR Summary Statement Department Statement Open GL Transactions Project Summary Statement Recharge Center Report Statement State Summary Statement
Department/Site	Enter a specific Department	ed Department(s)
Data Options	Include MOT Ledger	
		Run Report

2. Select a Folder/Report from the respective dropdowns for the report you want to run. The Parameters Page appear.





- Training Guide: FDS On-Demand Reporting
- 3. Enter the Required parameters, indicated with red labels, and any optional parameters you desire.
- 4. To a select a **Business Unit** or **Fund**, select a value from the right-side list and click the arrow to move the value to the left-side Select list.



To enter a specific **Department**, **Site**, **Segment** or **Initiative**, etc., enter the value in the bottom of right-side list and click the lower arrow button to move the value to the left-side Selected list.

	Department					
	Select a Department node	~		Selected Department	t(s)	
		_	>			
E	Enter a specific Department	*	>			•
				Remove	Remove All	

5. Scroll to the bottom of the Page Parameters and click the Run Report button.

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đâ				Enter a specific Initiative		Remove	Remove All	Enter a specific Segr	nent	Remove		Remove All	~		^
			Function	Function L1 - ALL FUNCTIONS L2 - NON_OPS_ACTIVITY L2 - TOTAL_EXP_AND_USES L2 - TOTAL_EXP_AND_USES L3 - DIRECT_EVPAND_SUPPT L3 - DIRECT_EVPENDS L3 - NIDRECT_SUBCES L3 - NIDRECT_SUBCES L3 - NIT_ASST_RELEASE	Sel	ected Function(s) Remove	Remove All								
			Data Options	Include MOT Ledger											
			Formatting Options	Include Subtotals											
							Run Report								ŀ

Once a report has been initiated, you can navigate back to the Home page and run additional reports without waiting for the first report to return.

To switch between multiple report documents that you have previously run or currently running, click the **Currently Open Documents** dropdown at the top of the screen.

BI Launch Pad									
Currently Open Documents									
COB Trend Comparison	\otimes	>							
Trial Balance by Account Detail	\otimes	>							



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Retained Parameter Values

Once a report has been run, the parameters used on that report will be retained for subsequent report runs, both when switching between reports, as well as between log-in sessions. *

The retained values will be highlighted in green when another report is selected.

FDS Folder/Report Sele		Chartfield Summary Statement	<u> </u>	Reset Page Parameters
Selected FDS Folder/Re				
	Fiscal Year (Required) 2015	Accounting Period (Required) 12-June	(
BU/Fund	Business Unit (Required) L1 - Columbia U Consolidated AdREN - Other Agencies AMREI - American Assembly COULN - Columbia University COULN - Columbia University COULP - Corter (Frund COULP - Conterlise Consol Elimination BU CULHC - Columbia University Press	L1 - Columbia U Consolidated	Fund	
Department/Site	Department Select a Department node	4041102	Ske Select a Site node	
		Relifive All		Remove An

Note: Due to variations in report parameter requirements, some parameters are not able to be retained. This functionality is achieved through the use of browser cookies. If you clear your cookies between browser sessions, the parameters will be reset.

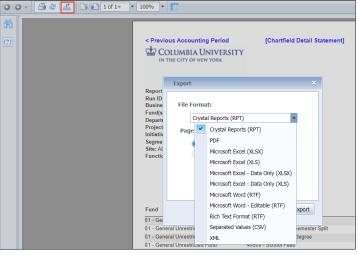
To reset all retained values on the current page, click the **Reset Page Parameters** button:

Exporting a Report

Once a report has run successfully, it can be exported to a number of file formats. The most commonly used formats are PDF and Microsoft Excel.

To export the report

1. Click the **Export** icon in the toolbar in the report viewing window.



- 2. Select the desired File Format in the dialog box that pops up
- 3. Click the **Export** button.

Note: The Microsoft Excel (XLSX) is the preferred format for exporting to Excel. The Microsoft Excel (XLS) format supports a maximum of 65,536 rows on a single worksheet.



Exporting to Excel Corruption Issue Workaround

You may encounter an issue when exporting to Excel where you receive a corruption message and cannot open your downloaded Excel file.



When you click a link within the report to view a related detail report and then navigate back to the original report, a bread crumb of open reports appears in the upper left corner of the FDS window. If you attempt to export the original report to Excel without taking the action below, the corruption will occur.

 File
 Image: Constraint of the second secon

In order to export the original report to Excel without the corruption issue, click the breadcrumb link to the original report from the upper left corner of the FDS window. The report will now export to Excel normally.

Advanced Topics:

Searching for values within a report

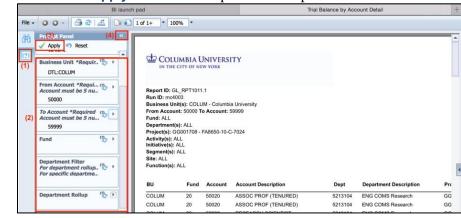
- 1. Click on the **Find** icon on the left side of the report. The Find panel appears.
- 2. Enter the specific value you are searching for and press Enter or click the Find icon in the Find panel.
- 3. Click on any of the returned results to navigate to the corresponding page in the report.

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File -	00.324	1 of 1+	100% -				
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	54410 🎢 🔸	54410	STUDENTS-CASUAL (FT)	5213104	ENG COMS Research	GG001708	1
(?)	4 Results Found	54410	STUDENTS-CASUAL (FT)	5213104	ENG COMS Research	GG001708	- E
	4 Results Found(3)	54410	STUDENTS-CASUAL (FT)	5213104	ENG COMS Research	GG001708	1
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	Page 1	59010	FRINGE BENEFIT CHARGE	5213104	ENG COMS Research	GG001708	1

Re-running a report with different parameters

You can re-run a report with different parameters by returning to the FDS On Demand Reports interface, update the parameters, and re-run the report. Or, within the report you have run, you can use the Prompt Panel to update the parameters.

- 1. Click on the **Prompt** icon on the left side of the report. The Prompt Panel appears.
- 2. Change the parameters as needed *
- 3. Click on the **Apply** button at the top of the Prompt Panel.



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Getting Help

Please contact the Finance Service Center http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now https://columbia.service-now.com