

This job-aid describes the procedures to run COB Analytics Reports using Web Intelligence (Webi).

Accessing Webi COB Analytics

1. Log into the ARC Portal and click the GO to FDS

Go to FDS button. The FDS screen appears.

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Home Documents		
▼ FDS On Demand Reports		▼ My Sche
FDS On Demand Reports	•	•
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2. In the **Home** tab, click the **FDS COB Analytics** link. Go to the *Running a Webi COB Analytics Report* section to run the desired report.

OR

2. Click the **Documents** tab from the top of the screen.

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Folders Public Folders		COB 6 Year Snapshot
		COB Detail - Intra-day
DS On Demand Reports	-	COB Drivers of Change - Intra-day
Public Folders OS On Demand Reports Arc ChartField Statements	-	COB Summary - Historical
🐃 🖿 ChartField Statements		
Claim on Cash Reports		
COB Analytics 3		
📔 Consolidated Operating Reports (COB)		
···· 🖿 Endowment And Gift Reports		

3. Expand the ARC folder and Click the COB Analytics folder.

Running a Webi COB Analytics Report

1. Double click the desired report **Title**. A Prompts window appears.



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- 2. Click Refresh Values.
- 3. Select the appropriate department hierarchy from the **Dept. Tree** in the center section of the window.
- 4. Click the arrow >. The selection appears in the right section of the window.
- 5. Click **OK**. The selected report will be generated.

Changing Input Controls

1. To change Department hierarchy, Grants or Non-Grants, Internal Transfer Status, click the **Input Controls** icon from the left side toolbar. The Input Controls panel appears.



2. Make the desired changes from the panel.

Exporting to Excel

1. Click the **Input Controls** icon from the left side toolbar. The Input Controls panel appears.



- 2. Select Off (for exporting to Excel) from the Freeze Header and 1st Column setting.
- 3. Click the **Export to Excel** icon from the top toolbar.



Working with the Intra-Day COB Detail Report

Adding and Removing Columns

Unlike FDS COB detail reports and other COB Analytics reports, the COB Detail – Intra-day report does not contain all fields by default. You can add columns to the report using the following method:

1. Select the **Design** view from the upper right corner of the report window.

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2. Select the **Available Objects** icon from the left toolbar.



The list of Available Objects appears.

3. Drag and Drop the desired object to the desired column location in the report.



Or, replace a column by dragging the object over the center

of the column header.

To remove the column, drag it back to the list. Or, right-click the header, click **Delete** and **OK**.

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Adding and Removing Filters

- 1. Select the **Design** view from the upper right corner of the report window.
- 2. Right-click on the heading of the column that you would like to filter and click **Filter** and select **Add Filter**.



The **Report Filter** window appears.



3. Click Add Filter. A list of Available Objects appears.

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🖃 🔊 COB Detail - Intra-day	
# Account	- 1
# Acct Descr	
Activity Descr	
Activity Id	
Aff. Dept. Tree - L4 (School/Admin Unit)	
# Aff. Dept Tree - Deptid	
Affiliate Project.	
Aff Zcu Central	
Business Unit	
# Cob Line	
COB Line Tree - Cob Line	
COB Line Tree - L1 (I.)	
COB Line Tree - L2 (I.A.)	
COB Line Tree - L3 (I.A.1.)	
COB Line Tree - L4 (I.A.1.a.)	
4	
OK	Cancel

 Select the Object that you would like to filter on and click OK. The selection appears in the Report Filter window.

/ Cob Line In List - L.D.2. Other Educ Res	ceipts - C			
Coli Line 12.3. Other Sale: Recepts - Other 12.4.4.907 fram: Transactions 11.1.1. Institutional Segund 17.0.4.4.107 fram: Transactions 17.0.4.1. densets 19.9 V.5.1. densets 19.9V.5.1. densets 19.9 V.5.1. densets 19.9V.5.1. d	Cob 1.0 4	Line In List 2. Other Educ Recepts - Othe	e	
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5. Click **OK**. The report is filtered for the criteria with subtotal lines in amount columns.

To remove a filter, right-click the column heading, click **Filter** and select **Remove Filter**.

Webi COB Analytics



Getting Help

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

You can log an incident or request a service via Service Now

https://columbia.service-now.com

Or, you can contact the Service Center by phone: (212) 854-2122