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 button. The FDS screen appears.

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.

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.

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.

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.

You can drag the object to the right edge or left edge of a column header. 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.

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.

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

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.
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

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