

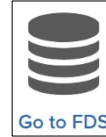
Financial Data Store (FDS) Reports Training Guide



This Training Guide details how to navigate the Business Intelligence (BI) Launch Pad in order to access FDS reports. The BI Launch Pad has a tile interface with easy access to On Demand reports, Consolidated Operating Budget (COB) Analytics reports, Favorites and Recent Documents.

Navigating the BI Launch Pad

To access FDS, go to my.columbia.edu, click the ARC tab, and then click on the Go to FDS icon.



You can create **Categories** and designate Categories to reports in order to organize them as desired.

Use the **Tabs** to quickly move to different sections of the Home page instead of using the scroll bar.

Use the **Currently Open Documents** dropdown to switch between open documents

Use the **Documents** tile to view a comprehensive list of all the reports for which you have access.

Use the **Folders** tile to access folders that contain and organize all the reports for which you have access.

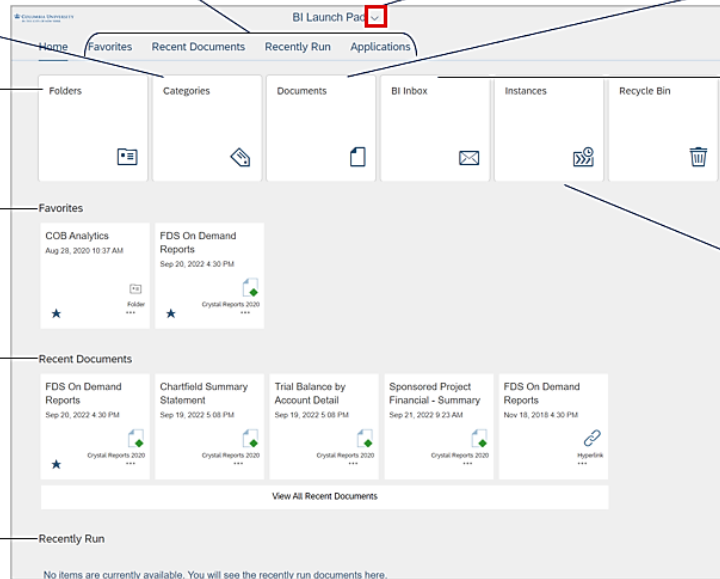
Use the **BI Inbox** tile to access the documents and alerts you have received from other users.

You can add tiles for your frequently used Folders and Reports to **Favorites** for quick access. COB Analytics and FDS on Demand Reports are automatically included

Use the **Instances** tile to view a list of all the Scheduled Instances and status of the reports you scheduled.

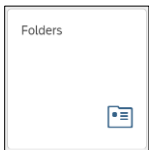
Recent Documents contain tiles for the Documents and Reports that you recently ran.

Recently Run will contain tiles for documents of Scheduled Instances that have recently run.

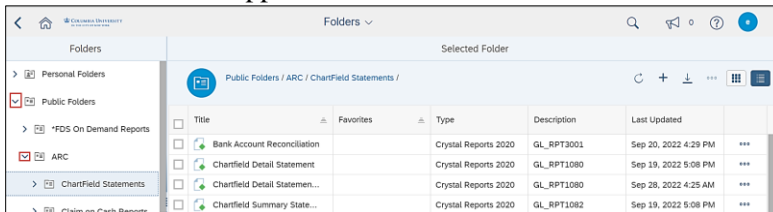


Navigating Report Folders

1. Click the Folders tile.



The Folders screen appears.



2. Navigate by expanding **Public Folders** and the **ARC** folder. Select the subfolder containing your desired report.
3. Click the desired report **Title** to Enter Values for parameters and run the report.

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Running Reports

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.

2. Select a Folder/Report from the respective dropdowns for the report you want to run. The Parameters Page appears.
3. Enter the Required parameters, indicated with red labels, and any optional parameters you desire.
4. Scroll to the bottom of the Page Parameters and click the Run Report button.

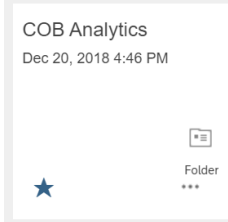
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Running Reports

Running COB Analytics

1. Click the COB Analytics tile. (You can also navigate to the Folders tile > Public Folders > Cob Analytics folder.)



The COB Analytics folder appears with the list of report Titles you can run.

Title	Favorites	Type	Description	Last Updated	
<input type="checkbox"/> Budget Review - Summary...		Shortcut		Aug 20, 2019 4:40 PM	...
<input type="checkbox"/> COB 6 Year Snapshot		Web Intelligence		Sep 27, 2022 12:31 PM	...
<input type="checkbox"/> COB Detail - Historical		Web Intelligence		Sep 19, 2022 5:08 PM	...
<input type="checkbox"/> COB Detail - Intra-day		Web Intelligence		Sep 19, 2022 5:08 PM	...
<input type="checkbox"/> COB Drivers of Change - I...		Web Intelligence		Sep 19, 2022 5:08 PM	...
<input type="checkbox"/> COB PROMPT UPDATE		Crystal Reports 2020		Sep 19, 2022 5:08 PM	...
<input type="checkbox"/> COB Summary - Historical		Web Intelligence		Sep 19, 2022 5:08 PM	...
<input type="checkbox"/> COB Trend Comparison		Web Intelligence		Sep 19, 2022 5:08 PM	...
<input type="checkbox"/> Direct Expense Budget Re...		Web Intelligence		Sep 19, 2022 5:08 PM	...

2. Click the report Title you want to run. The Prompts window appears.

Search

Fiscal Year

Search or enter value(s) manually

To see the content of the list, click the refresh values button.

Mandatory (3) Reset All Run Cancel

3. Use the pane on the left to navigate to different prompt category sections and enter desired parameters. Required prompts will be indicated with a note to "Please select at least one value." You cannot run the report until you complete required prompts.
4. Click Run.
See the section on Web Intelligence (Webi) Features for more details on viewing COB Analytics.

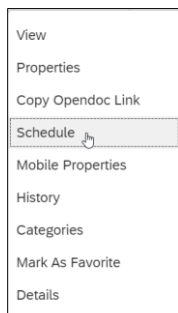
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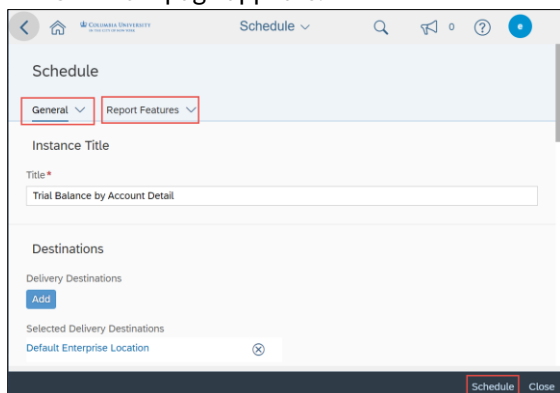
Running Reports

Scheduling a Report and Viewing Instances (for those with report scheduling access)

1. Click the Actions  button for the report you want to schedule and click Schedule.



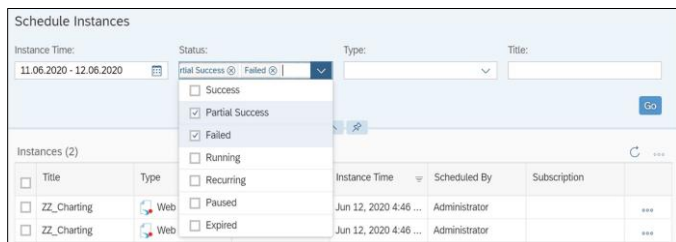
The Schedule page appears.



2. Complete the Schedule fields.
 - The **General** tab contains sections that define a schedule, like the schedule's Destinations, Recurrence, Events, and Notifications.
 - The **Report Features** tab contains sections for the report values Prompts, Formats, and Print Settings.
3. Click the **Schedule** button at the bottom of the page.
4. Click the **Instances** tile on the Home screen to view your Schedule Instances and their status.



You can filter the Schedule Instance page by date, object type, or name. You can also switch between the list view and a calendar view.

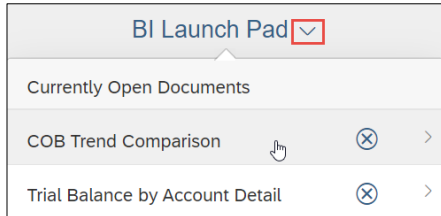


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BI Launch Pad Features

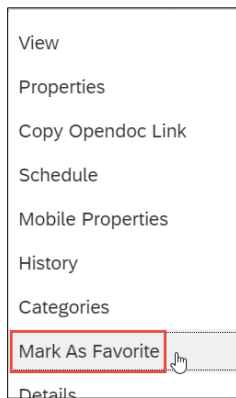
Navigating to Open Documents

Click the **Currently Open Documents** dropdown at the top of the screen to switch between documents you have previously run (in the same session) or reports you are currently running.

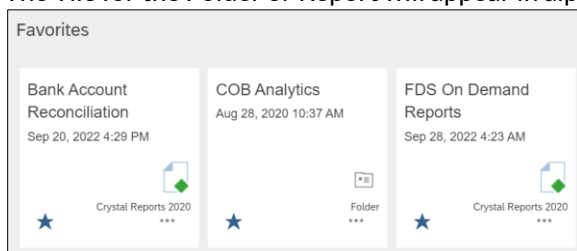


Creating Favorite Tiles

1. Navigate to a Folder or Report that you want to make a Favorite.
2. Click the **Actions** button for the report you want to make a Favorite and click **Mark as Favorite**.



The Tile for the Folder or Report will appear in alphabetic order under the Favorites section on the Home page.



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BI Launch Pad Features


Creating Categories and Categorizing Folders and Reports

1. Click the **Categories** tile to create a Category to help organize Folders and Reports.



The Categories Page appears and lists your previous Categories and any items you categorized.

Title	Favorites	Type	Description	Last Updated	
Finance Training Reports		Personal Category	Testing Categories	Oct 3, 2022 12:39 PM	...
Training		Personal Category	Category for Training	Sep 20, 2022 4:29 PM	...

2. Click the **Create Category**  button. The Create Category window appears.


Category Name
New Category1

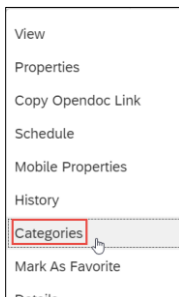
Description

Save Cancel

3. Enter a **Category Name** and **Description** and click **Save**.

To Categorize a Folder or Report:

1. Navigate to a Folder or Report that you want to categorize.
2. Click the **Actions**  button for the report you want to categorize and click **Categories**.



The Assign to Category window appears.

Assign to Category

Personal Categories

- Finance Training Reports
- Training

OK Close

3. Select the **Check Box** for the desired Category or Categories. Navigate to the Categories page to view.

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BI Launch Pad Features

Web Intelligence (Webi) Features

COB Analytics reports utilize Web Intelligence (Webi) to run and display information. Webi comes with features to help you navigate, display, filter, and analyze your data.

Use the **Export** button to export your report to Excel, PDF, HTML or other formats.

Use the **Query** button to change Prompt Values after running your report.

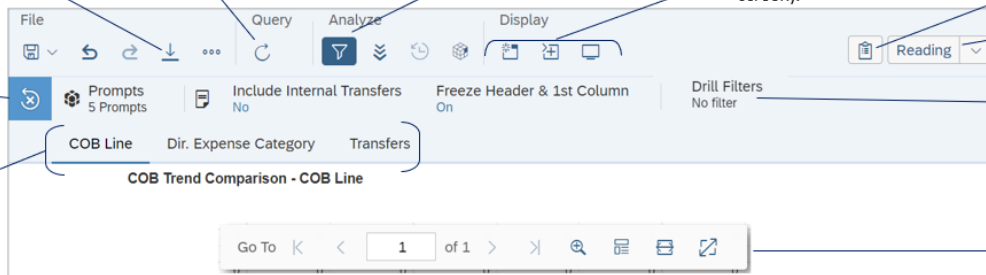
Use the **Filter** button to display and set filter values.

Display Settings allow you to Freeze Header, Fold/Unfold Rows, and run in Presentation Mode (full screen).

Show Main Panel to view report properties.

Use the **Reset** button to reset all controls and remove filtering when in Reading mode.

Use **Tabs** to navigate to documents in the report.



Toggle between **Reading** or **Design** (for Webi Developers) mode.

Drill Filters are available when you activate the **Filter** button.

Use the **Vanishing Toolbar** at the bottom of the page to navigate the report when in Reading mode.