JOB AID

FDS On Demand Reporting

Overview
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.

The following topics are covered in this Job Aid:

- How do I access FDS?
- The Business Objects LaunchPad
- How do I run a report on demand?
- Visual feedback on required fields
- Retained parameter values
- How do I export a report (Excel, PDF, etc.)?
- Advanced topics:
  - Searching for values within a report
  - Re-running a report with different parameters
  - How do I set up a report to run on a schedule?

How do I access FDS?
From the My Columbia page, click on the ARC Portal link, then click on the “Go to FDS” button:

Note: If you have had the ARC Portal open for a while without activity, you may be asked to log-in again, using your UNI and UNI password, when clicking on the “FDS Reports”.

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The “Go to FDS” button will take you to the Business Objects LaunchPad. This may look different if you have customized your preferences. To find out how to do this, please refer to the “FDS Preference Settings” job aid which can be accessed from the following link: http://finance.columbia.edu/content/fds-preference-settings.

The Business Objects LaunchPad
The LaunchPad is divided into four quadrants, as follows:

- **FDS On Demand Reports** – single click to access
- **My Scheduled Reports Output** – shows any report that you have scheduled to run. Please refer to the “FDS Scheduled Reports” Job Aid for details on how to schedule FDS reports.
- **My Inbox** – shows any unread reports that have been delivered to your Inbox (this includes reports you or others have set up to be delivered to you; there may be duplication of some reports between My Scheduled Reports Output and My Inbox.)
- **Alerts, Documentation & Messages** – shows system status messages

How do I run a report on demand?
From the Business Objects LaunchPad, click on the “FDS On Demand Reports” link. The following screen is displayed:
Once in the FDS On Demand Report interface, select a report folder and report from the subsequent report drop-down list (see below for an example):

Enter parameters for the selected report and click the “Run Report” button:
To enter a specific Department, Site, Segment or Initiative, enter the value in the lower text box and click the lower button to move the value to the “Selected [Department(s), Site(s), Segment(s), Initiative(s)]” list:

Clicking the Run Report button will launch the report in a new tab or window depending on your browser preferences.

Once a report has been initiated, you can navigate back to the FDS On Demand Reports Interface and run additional reports without waiting for the first report to return, which reduces the time spent waiting for reports to return when more than one report is needed.

Below is a sample screenshot of a session where two reports have been launched from the same FDS On Demand Reports interface.
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**Visual Feedback on Required Fields**

If a required field is left blank, a pop-up window is displayed noting the missing field(s) which will also be highlighted in red:
**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, as shown in the example below.

*Exceptions: due to variations in report parameter requirements, some parameters are not able to be retained. Also, please note that 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:
How do I export a report (Excel, PDF, etc.)?
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.

The “Microsoft Excel (97-2003)” format supports a maximum of 65,536 rows on a single worksheet. If your report contains more than 65,536 rows of data, it will be spread out over multiple worksheets using this format. The “Microsoft Excel Workbook Data-only” format (a.k.a. *.xlsx - Excel 2007 and beyond) supports up to ~1 million rows of data per worksheet, however, since it is a Data-Only format, the report will not be formatted and may be missing header information.

To export the report:
1. Click on the icon in the toolbar at the top of the report viewing window.
2. Select the desired file output format in the dialog box that pops up.
3. Click the “Export” button in the dialog box.
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Advanced Topics:
Searching for values within a report
To find a specific value within a report that you are viewing (e.g. finding a specific account within a large report)

1. Click on the icon on the left side of the report viewing window to show the “Find” panel
2. Enter the specific value you are searching for and press enter or click the binoculars icon in the find panel to execute the search
3. Clicking on any of the returned results will navigate the viewer to the corresponding page in the report.
4. [optional] To hide the “Find” panel, click on the icon in the “Find” panel header.

Re-running a report with different parameters
There are two options for re-running a report with different parameters:

- The first and recommended method, is to return to the FDS On Demand Reports interface, update the parameters and re-run the report.
- The second method is to use the Prompt Panel as shown below.

1. Click on the icon on the left side of the report viewing window to show the Prompt Panel
2. Change the parameters as needed *
3. Click on the “Apply” button at the top of the Prompt Panel
4. [optional] To hide the Prompt Panel, click on the icon in the Prompt Panel header.
* The “Specific [Department(s), Initiative(s), Segment(s), Site(s)]” parameters require that the “.SPECIFIC [DEPARTMENT, INITIATIVE, SEGMENT, SITE]” values be selected in the respective “[Department, Initiative, Segment, Site] Filter” parameters to be applied in the report. Please refer to the “FDS Scheduled Reporting” job which can be accessed from the following link: http://finance.columbia.edu/content/fds-scheduled-reporting.

**How do I set up a report to run on a schedule?**
The FDS scheduling functionality enables users to schedule reports to run automatically at specified times. When a scheduled report runs successfully, an instance of the report is created and the report is delivered to a destination specified by you, e.g. your Business Objects Inbox found on the LaunchPad. If you are interested in obtaining the ability to schedule reports, please open an Incident in ServiceNow with CUIT, and request FDS report scheduling capabilities. The request will be routed to the CUIT Enterprise Business Intelligence Solutions (EBIS) team who will respond. For guidance on scheduling reports once access has been provided, please refer to the “FDS Scheduled Reporting” job aid which can be accessed from the following link: http://finance.columbia.edu/content/fds-scheduled-reporting.

If you have any questions, please contact the Finance Service Center. You can log an incident or request a service by using a self-service web form, or you can contact the Finance Service Center by phone: (212) 854-2122.