Using the Project Reporting Jump Page

Overview

As you and your colleagues are associated with various projects, we understand how important it is for you to easily access financial information for each project on a regular basis. To address this need, we have developed the Project Reporting Jump Page as a way for ARC / FDS users to quickly obtain the most commonly used financial reports for each project. The Project Reporting Jump Page is generated by UNI and provides a listing of all projects associated with an individual and the individual’s level of affiliation with the project. Additionally, the Jump Page provides direct access to frequently used project reports without requiring the user to enter specific report parameters. The purpose of this job aid is to provide you with guidance on how to access and use the Project Reporting Jump Page.

There are three levels of affiliation an individual can have with a project:

- **You are the Project Manager for the Project(s):** this category indicates all projects for which an individual is designated as the manager of the project.
- **You are on the Project Team, but not the Project Manager for the Project(s):** this category indicates all projects for which an individual is listed on the project team but not primarily responsible for managing the project.
- **You have access to the Project, but you are not on the Project Team for the Project(s):** this category is associated with projects where your security role allows you administrative access to project information.

Only projects that are currently active, or were active within the prior nine months of running the Project Reporting Jump Page, will be included.

**Note:** The following instructions are based on Mozilla Firefox. Use of other web browsers will result in slightly different presentation and functionality.

In accordance with University policy, you will be timed out after a session has been inactive for 30 minutes or more. If you want to continue looking at your Jump Page after a 30 minute period of inactivity, you will need to re-authenticate by signing in again with your UNI and UNI password.
How will I access the Project Reporting Jump Page?

The Project Reporting Jump Page is accessed from the FDS (Financial Data Store) Reports, a link to which can be found on the ARC Portal.

**Note:** In order to access the information on the Project Reporting Jump Page, you will need the UNI of the individual for whom you want to generate the project listing. Any FDS user can enter any UNI, and the listing of projects associated with that UNI will be returned. However, to be able to actually run any reports associated with the projects listed, the user who is logged in to FDS must have the appropriate security access for data to be returned.

Navigate to the MyColumbia Portal at [my.columbia.edu](http://my.columbia.edu), log in with your UNI, then choose the **ARC Portal** tab, click on “Go to FDS” button at the top of the page:
**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”.

The “Go to FDS” link will take you to the following InfoView page. This may look different if you have customized your InfoView home page. To find out how to do this, please refer to the FDS Reporting Access job aid: [http://finance.columbia.edu/content/fds-reporting-access](http://finance.columbia.edu/content/fds-reporting-access).

From the Home (Navigation) Page, click on “Document List”:
Under “Public Folders” open the ARC Folder by clicking on the “+” sign. Double click on the “Project Lifecycle Reports” folder to open it:

Double click on the “Project Reporting Jump Page”: 
You will be directed to the “Project Reporting Jump Page” home screen. The default is “Current User” – leave this if you want to generate the project listing for yourself. If you want to generate the project listing for someone else, enter their UNI. In either case, you then need to click “OK”.

You will see a breakdown of all projects associated with the UNI and the level at which the individual is affiliated with the project. Again, there are three levels of association:

- You are the Project Manager for the Project(s) listed below
- You are on the Project Team, but not the Project Manager for the Project(s) listed below
- You have access to the Project, but you are not on the Project Team for the Project(s) listed below

Click here to see the full number of pages.

Click “RUN” to run a specific report.

Note: To see all pages of the Jump Page by page number, click on the end arrow on the top of the screen (see above). This will take you to the last page of the report. You can then navigate to any page.
Each project is separated by a line. For each project, you have a choice of which reports to run:

- Anything in bold (Project ID, Project Description, Project Manager) reflects the roll-up of all Activities for that project.
- Anything that is not in bold (Activity ID, Activity Description, Activity Period) reflects detail just for that particular Activity.

To access the financial reports associated with each project, click “Run” for the report you are looking to generate. There is no need to complete run control parameters for these reports. The report options for each project are as follows:

- Project Summary Report
- Project Detail Report
- Payroll Summary Report
- Payroll Detail Report
- Open Commitment Report (includes SAPO’s)
- SAPO Report

The report will be generated for the current accounting period. If you want to generate reports for other accounting periods, you can use the “Previous Accounting Period” and “Next Accounting Period” links at the top of the report.

To understand the purpose of each report, please refer to the “Frequently Used Project Lifecycle Financial Reports” job aid: [http://finance.columbia.edu/content/frequently-used-project-lifecycle-financial-reports](http://finance.columbia.edu/content/frequently-used-project-lifecycle-financial-reports).

Remember, to be able to run any reports associated with the projects listed, the user who is logged into FDS must have the appropriate security access for data to be returned. If you select “Run” for a particular report, but a blank report is returned, you may not have the appropriate security to view that data. You can review all of your ARC security roles by running a query in ARC – refer to the “Viewing Your Security Role(s) in ARC” job aid: [http://finance.columbia.edu/content/viewing-your-security-roles-arc](http://finance.columbia.edu/content/viewing-your-security-roles-arc). To apply for additional roles, or for access to additional departments, projects or segments, you will need to complete the Financial Systems Security Application, which can be found in Service Now at [https://columbia.service-now.com/navpage.do](https://columbia.service-now.com/navpage.do).

However, please note: if there is no activity on the Project Summary or Payroll Summary Reports for the accounting period, then the corresponding detail reports will be blank. In addition, the Open Commitment Report will be blank if there are no open purchase orders in the system.
To view projects associated with another individual, click on “Parameters”, type in a new UNI, and click “Enter”:  

![Image of a software interface showing project information]