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.
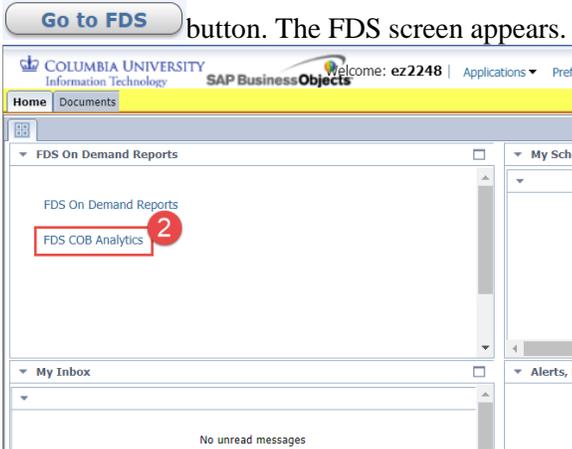
2. In the **Home** tab, click the **FDS COB Analytics** link. Go to the *Running a Webi COB Analytics Report* section to run the desired report.

OR

2. Click the **Documents** tab from the top of the screen.
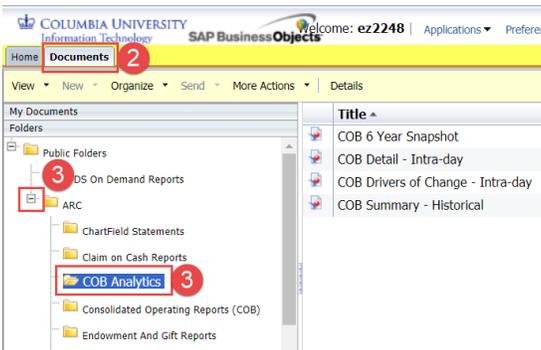
3. Expand the **ARC** folder and Click the **COB Analytics** folder.

Running a Webi COB Analytics Report

1. Double click the desired report **Title**. A Prompts window appears.
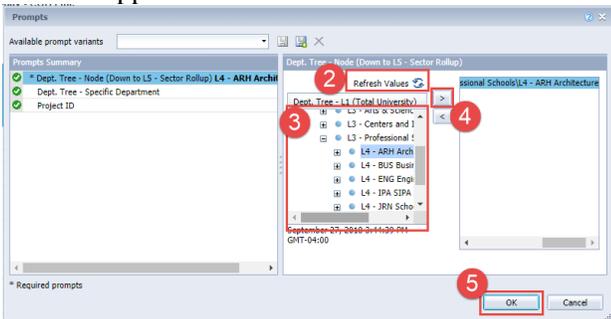
2. Click **Refresh Values**.

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.
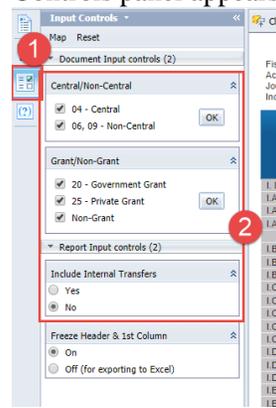
2. Make the desired changes from the panel.

Exporting to Excel

1. Click the **Input Controls** icon from the left side toolbar. The Input Controls panel appears.
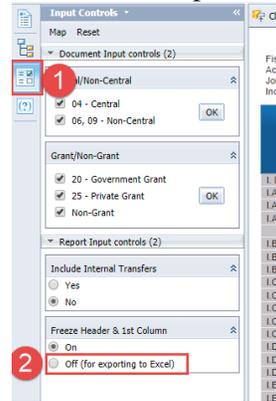
2. Select **Off (for exporting to Excel)** from the **Freeze Header and 1st Column** setting.

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**.

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Getting Help

Please contact the Finance Service Center

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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