InfoView Reports

Generating InfoView Reports at Columbia University

Training Guide
Introduction

The Purpose of this Training Guide
The purpose of this training guide is to provide you with guidance for accessing and generating InfoView reports.

InfoView Reports
- Accessed via the Enterprise Reporting tab of myColumbia
- Available reports based upon security access (e.g. DARTS, HR, SIS, etc.)
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Columbia University InfoView Reports

The Purpose of this Lesson
The purpose of this lesson is to review accessing the Columbia University Enterprise Reporting site, accessing and navigating the application used to generate InfoView reports and how to view, save and print InfoView reports.

Lesson Learning Objectives:
At the end of this lesson, you will be able to:

- Recall Reporting mechanisms used at Columbia University
- Access and Navigate the Enterprise Reporting Section of myColumbia
- Access and Navigate the InfoView Reporting Portal
- Access, view, print and save InfoView Reports
Columbia University streamlines the reporting environments into two repositories: ARC and the University Data Store (UDS).

ARC provides real-time access to financial data and the University Data Store (UDS) is the data warehouse repository, where data from ARC, PAC/LA, Student, and Historical/Legacy system data is stored.

Within the University Data Store (UDS) are the Financial Data Store (FDS), HR Data Store (HRDS), Student Data Store (SDS), Integrated Data Store (IDS) and the Historical Data Store (HDS).

Data in the University Data Store is “day old data”. That is, running a report today displays information as of yesterday.

Each component of the University Data Store (UDS) contains its own suite of reports.

InfoView reports are a suite of reports (e.g. HR, DARTS, and SIS) available to you per your security access and are accessible via the Enterprise Reporting section of myColumbia.

InfoView Reports is the focus of this lesson.
How to Generate an InfoView Report

Step by Step

1. Sign on to myColumbia/HR Manager Resources/Reports
2. Click the “Enterprise Reporting” link
3. Click the ‘Business Objects InfoView Portal’ link below the ‘Reports’ section on the page
4. Navigate to the suite of reports: Navigate>Document List >Public Folders>Open the folder for the reports, e.g. HR, DARTS, etc.
5. Access a report. Enter report parameters, if required
6. View the report
7. Save the report, if desired
8. Print the report, if needed

Note: This is a quick step by step guide, we will go through each of these steps in detail.
Generate an InfoView Report

Step 1 – Sign on to myColumbia/Enterprise Reporting/Reports

- Open your web browser
- Go to www.my.columbia.edu
- Click the Log In Now button
- Enter your UNI and Password
- Click the Log In button

You will be logged into myColumbia, a user interface that brings together access to key information and services into one common place.
Generate an InfoView Report, cont.

**Step 2 – Access the Enterprise Reporting Section of myColumbia**
- Click the ‘Enterprise Reporting’ link at the top of the page

**Step 3 – Access the InfoView Reports**
- Click the ‘My Business Objects InfoView Reports’ link below the ‘Reports’ section on the page
Generate an InfoView Report, cont.

Step 4 – Locate the suite of reports

- Click on the 'Document List' link under the Navigate section of the portal

This is the view of the reporting portal. Items are grouped into two sections on the page. The first section on the left is the list of areas where you can retrieve reports. The second section is the actual listing of reports.

- Click the plus sign next to the 'Public Folders' link to expand the reports types (available to you per your access)

- Click the folder for the suite of reports you would like to see, e.g. DARTS, HR, Student Information Systems

Once a report area is selected, e.g. HR, the listing of available reports displays under the Title column.
Generate an InfoView Report, cont.

**Step 5 – Access a report**

Once you click on the folder for the suite of reports, all of the available reports are displayed. To access a report, double-click the report and the report displays. The reports initially are displayed in HTML format and there are options to save the file in Excel, PDF or Comma delimited if you so choose.

- Double-click on a report. Below is an example of the HR Data Reports listing

![Image of HR Data Reports listing]

This is a guide on how to download files into Excel

Items may appear on multiple pages. If so, click the arrows to navigate

The HR Data Reports appear. Double click on any of the report lines to access the report
Generate an InfoView Report, cont.

Step 6 – Viewing a report

Once a report is selected, it either displays the information as a chart on the page or it will ask you to enter additional parameters. Below is an example of a report displaying information where no additional parameters need to be entered.

Each report also includes a ‘Report Description’ that provides a brief description of the report along with the parameters selected, if applicable. Click the ‘Report Description’ link on the left hand menu to display the description.

Click the Report Description link on the left hand menu to display the report description and user entered parameters, if any.

Click the arrows to page through reports if there are multiple pages.

Report example where data displays without additional parameters entered. Note: there is no data appearing in the report.
Generate an InfoView Report, cont.

Step 7 – Saving a report

Use the document dropdown list to save the report to your computer.

- Click the drop down arrow next to ‘Document’
- Select ‘Save to my computer as’
- Select the file type (e.g. Excel, PDF or CSV)
- Click ‘Save’
- Name the report and select the location on your computer to save it to

Before viewing, saving or printing a report, ensure that your IE Browser is set up to enable automatic prompting for file downloads. Check this option is selected by bringing up your Internet Explorer and following the links:

Tools-->Internet Options-->Security Tab-->Click on Custom Level-->Downloads--> ‘Enable’ the ‘Automatic prompting for file downloads’.
Generate an InfoView Report, cont.

Step 8 – Print a report

- Click on the Printer Icon on the menu bar. The output format is PDF.

**Note:** if you export the report into another format such as Excel, you may also print the report from that format.

**Note on the Refresh Data button**

- On the screen is a ‘Refresh Data’ button located on the right hand side of the tool. As University Data Store reports contain ‘day old data’, the information is updated nightly and clicking this button will not return any newer results.
Other myColumbia Portal Links

Reports exist in other areas of myColumbia. Notice when you first logged in, additional links appear at the top of the screen. Access to sites is dependent upon your security authorization and thus which links appear for you. Each link provides access to a specific portal area. Let’s explore the links to reporting areas within these other sites.
Other myColumbia Portal Links – HR Manager Resources

Within the HR Manager Resources section is a Reports section

- MSS, Labor Accounting Reports, HR Data Reports, Payroll Reports and DARTS Reports are accessed from this page by clicking on those specific links within the Reports section on the page.

Click here to access reports within the Manager Self-Service application.

Click here to access Labor Accounting reports.

Click here to access the HR Data Reports and the training guide and job aid on how to use the HR Data Reports.

Note: The HR Data Reports are also accessible via the Enterprise Reporting link.

Click here to access the Financial Data Store Payroll Reports.

Click here to access DARTS. Note: DARTS Reports are also accessible via the Enterprise Reporting and ARC links.
Other myColumbia Portal Links – ARC

Within the ARC section is a Reports section that provides real-time access to financial data. There is also a Legacy Reporting section.
Manager Self-Service (MSS) Reports

In addition to the reporting repositories, there is a production site within the PAC Manager Self-Service module where you can generate Manager Self-Service (MSS) Reports. MSS reports provide detail on Personnel Actions as well as Earnings and Payroll Information in a Department or Employee view.

Once you log in to the Manager Self-Service Reports portal on myColumbia, navigate to Manager Reports within the Manager Self-Service PAC Menu.

Access to MSS Reports is provided to the following PAC roles:
- Manager Self-Service
- Management Reporter

Refer to the Manager Self-Service Training Guide for information on generating these reports.
Sample Report Queries - HR Data Reports

Let's review report samples using HR Data Reports. We will review a report where user entered parameters are not required (Active Position Report) and where they are required (Post-Doc Demographic Report).
Active Positions Report

Report Description
This report displays all active University positions that are vacant or filled.

Report Use
This report is useful to see all of the open positions in a department. In this version, you will not see the names of the employees who occupy the positions. Position numbers can be obtained which are needed when entering a new hire in the Template-Based Hire application. It also helps if you need to reclassify a position. Note: work with your HR Client Manager when discussing position changes.

Report Parameters
This report does not require entry of additional parameters.

Report Results
The report results show:

- Position Number
- Position Description
- Job Code
- Department ID
- Grade
- Max Head Count
- Head Count
- Full/Part Time
- Std Hours
- Work Location
Post-Docs Demographic Report

**Report Description**

This report displays demographic data for all first time post-docs by department and title effective date.

**Report Use**

This report is useful to obtain post-doc data.

**Report Parameters**

This report does require additional information to be entered. Below is a screen print of the selection screen. This report requires three prompts to be entered. Click on each value to select and then click on the “Run Query” button on the bottom of the screen.

- Department Range (Begin)
- Department Range (End)
- After Title Effective Date

**Department Range (Begin & End):**

In this report, the department numbers must be entered.

Click on the “Department Range” (Start) and “Department Range (End)” lines on the top of the screen. After clicking each line, enter the seven-digit department number in the text box in the middle of the screen.

If you use the Default settings (0000000) and (9999999) you will get all your departments and associated information.

**Note:** When selecting or entering department numbers for dates prior to July 16, 2012, use the department number structure in use at that time, e.g. 0120000. When selecting or entering department numbers for dates post July 16, 2012, use the department number structure currently in use, e.g. 160600X.
Post-Docs Demographic Report, cont.

**After Title Effective Date:**

Click on the “After Title Effective Date” line on the top of the screen. After clicking this line, click the calendar icon to the right hand side of the text box in the middle of the screen to display the calendar. From there, click on the arrows in the calendar to navigate to the date. Click on the day in the month and year and the date will appear.

**Report Results**

The report results show:

- Name
- UNI
- Administrative Department Name
- Title
- Title Effective Date
- Year
- Month

Select/enter a value for each prompt

Click “Run Query” to produce the report
Frequently Asked Questions

InfoView Reports

Reports

What Reports are Available?

There are several suites of reports available to you based upon your security access, e.g. HR, DARTS, and SIS.

How do I access the Reports?


Support

Who do I contact if I have questions?

Submit an electronic inquiry to the PAC Service Center via Service Now - https://columbia.service-now.com/navpage.do or you may also contact them at 212-851-2888.

What training tools are available to me and how do I access them?

Training for the HR Data Suite of Reports is offered as part of the MSS Training classes held at Studebaker. To sign up for a session or to view training materials and information, visit the Human Resources website’s Transaction Information Guide/PAC Resources webpage at http://managers.hr.columbia.edu/tig/PAC.

For information on DARTS reports, visit the Finance Gateway at http://finance.columbia.edu/content/finance-training?nocache=1349361490

How do I correct information appearing in a report?

For HR data and to correct personal or position data for an employee, please complete a PAF form and submit it through normal channels. For guidance or emergency action please contact the PAC Service Center at 212-851-2888.

For other inquiries, contact the PAC Service Center.
Key Learning Points

- The University Data Store (UDS) is the data warehouse repository, where data from ARC, PAC, and Labor Accounting, Student, and Historical/Legacy system data is stored.

- InfoView reports are a suite of reports (e.g. HR, DARTS, SIS) available to you per your security access and are accessible via the Enterprise Reporting section of myColumbia.

- The data in the InfoView reports is “day old data”.

- Multiple pages of data can be listed. Click the arrows on the top of the report to view additional pages of data.

- Data can be saved in an Excel format for easy filtering and sorting.

- Access to data is restricted to the approved department access in your security profile.

- When selecting or entering department numbers for dates prior to July 16, 2012, use the department number structure in use at that time, e.g. 0120000. When selecting or entering department numbers for dates post July 16, 2012, use the department number structure currently in use, e.g. 160600X.