FIN 850: UDW+ Ad Hoc Reports Training

2015 Version 2.8

Program Services Office & Decision Support Group
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Subject Areas

1. Select New from the Header section. Choose Analysis.

   This brings you a list of available Subject Areas. Subject Areas group similar data elements together that answer specific business questions (such as Budget Summary, Budget Detail, Grants, and AP). These are granted to users based on security access.

   **Budget Summary** = monthly summary by accounting period
   **Budget Detail** = individual transactions at the journal line level

2. Choose Budget Summary.
Criteria Tab

Title of currently opened request (by default this analysis is “Untitled”).

Data elements are stored in an expandable/collapsible tree. Click the plus signs to expand a branch, and the minus signs to collapse it.

- **Facts** are Business Measures. Facts are things that are counted, aggregated, or that allow other mathematical calculations or analyses. Examples include budget, revenues, and expenses.

- **Dimensions** are entities that describe how facts are analyzed. They are attributes of facts. Examples include accounts, faculty, student, programs, department, time period, and location. Using dimensions allows you to bring context to the facts.

Hover over the data element to see its definition. You can also find definitions of the data elements in Budget Summary and Budget Detail in the **Data Dictionary**, found under Dashboards, UDW+ Help, Data Dictionary.

**Selected Columns** are where your data elements go.

**Filters** are used to filter specific elements.

**Save** and **Save As** icons to save your analysis.

**Catalog** displays your saved filters.
Create an Analysis

Create a budget summary report that shows: Monthly Actuals and YTD Budget, Actuals, Encumbrance, and Balance for Revenue and Expenses for fund 10 for FY15.

1. Go to New and click Analysis.
2. Select the Subject Area: Budget Summary.
3. Add the dimension: Account Tree Name from the “Required Filters” Folder.

Account Tree Name

When creating an Analysis with facts, you must always include a filter for Account Tree Name, located in the “Required Filters” folder.

WSQBC: WSQ Budget Control
WSQFP: WSQ Financial Plan
ADHTK: Abu Dhabi (used for government reports)

Budget Control (BC)
- Financial Aid is grouped as an OTPS Expense
- Transfers are grouped as either Revenue or Expense
- College Work Study is grouped as a Personnel Salary Expense

Financial Plan (FP)
- Financial Aid is grouped as a Contra-Revenue
- Transfers are grouped as its own category at the Account Class level
- College Work Study is grouped as Financial Aid Revenue

*For faster performance, it is recommended to use Active Chartfields. This is especially true using prompts, as it will only display the chartfields a user has access to, instead of all chartfields.

Dimensions

4. Add the following dimensions:
   - Business Unit
   - Fund
   - Org
   - Program
   - Project
   - Account
   - Account Class
   - Account Category
   - Accounting Period
   - Fiscal Year

Delete:

To delete a data element from the columns, hover over the three lines, and click Delete. Note that this only deletes it from the Selected Columns. If you’ve already defined a filter for the data element, that filter will stay there. You have to delete the filter separately if you no longer want it.
Facts

5. Add the following USD Currency facts:

- Actual USD (USD Currency > Monthly USD Folder)
- YTD Original Budget
- YTD Revised Budget
- YTD Actual
- YTD Encumbrance
- YTD Balance

**FACTS**

**Base Currency** = local currency of the Business Unit selected

**USD Currency** = US dollars

**Budget Rate** = uses the currency rate at the time the Original Budget was formed

**Subfolders**

**Monthly** = sum of transactions that occurred in that accounting period

**YTD** = Year to Date - running total of all budget details during a FY for a specific time period

**ITD** = Inception to Date - running total since the beginning of a chartfield's budget

Note: If working with Global sites, be sure to add the **Currency Code** column from the Business Unit folder.
Filters

6. Add the following filters:
   - Account Tree Name is equal to/ is in WSQBC
   - Business Unit is equal to/ is in [choose your own BU]
   - Fund is equal to/ is in [choose your own Fund]
   - Org is equal to/ is in [choose your own Org]
   - Account is between [choose Revenue and Expense accounts]
   - Fiscal Year is equal to/ is in 2015

Hover over three lines and select filter.

Delete:

Hover over the filter for the data element you would like to delete, and click on the red x.

Edit:

To edit a filter, click on the pencil icon next to that data element.

7. Click on Results tab.
Results Tab

Compound Layout shows the Table view and Title view by default. (Additional views may be added such as Pivot Tables, Graphs, Gauges, Maps, etc.)

Icons for viewing:

- Format Container \[ \] = change alignment, colors, border styles, etc.
- Editor \[ \] = provides options to edit
- Remove \[ \] = removes given view from compound layout

Subject Area= data elements columns can be added directly to a view on the Results tab by double clicking or dragging and dropping.

Catalog= displays your saved filters.

Views= A list of all created views, which may be added or removed from the Compound Layout. By default, Title and Table already exist.

Rows= Displays the first 25 rows. You may view the next 25 rows by clicking the single downward arrow, or view up to 500 rows by clicking the double sided arrow.
**Rearrange Columns**

1. By default, UDW+ will group columns together by their folder structure. You can **rearrange** the columns by dragging and dropping them. Make **Fiscal Year** and **Accounting Period** the first two columns:
   a. **Grab** the **Fiscal Year** column by hovering above its name until you see the multidirectional arrow \( \uparrow \downarrow \) over the tab on the top.
   b. **Drag** it and position it to be to the left of Business Unit until you see a **light-blue line** to the left, then drop it.
   c. Repeat steps for **Accounting Period** and position it to be after Fiscal Year, so it is the second column.

**Add a Filter without its Column**

If you want to filter on a data element, but don’t want the column to appear in the query results, you can add a filter without adding the column.

1. Go to the **Criteria** tab.
2. **Delete** the **Account Tree Name** column and **Account Tree Name** filter.
3. Go to the “Filters” toolbar and click on the **Filter** icon.
4. If desired column is not listed in the drop-down list, click **More Columns...** at the bottom.
5. Select **Account Tree Name** and click OK.
6. Set your **Account Tree Name** equal to **WSQBC**. Click OK.
7. Run **Results**.
Save Analysis

1. Save the created analysis by clicking the Save icon. The Save As option is also available should you wish to save an analysis under a different name or location.

2. Go to My Folders, create a new folder by clicking the New Folder icon.
3. Name this folder “Training”.
4. In the new Training folder, save the analysis as “Budget Summary Report”.
5. Click OK. Note that the name of the analysis and title have been changed.

Catalog

In the Catalog section, you can open, edit, copy, rename, and perform a variety of other actions accessed through the “More” dropdown option.

1. To access your saved analyses, click on Catalog in the header row.
2. Expand My Folders by clicking on the + sign.
3. Find your training folder.
4. Find your analysis and click Open.
Preview Results in Dashboard View

If you want to drill down on a hyperlink, such as Account Class, to view more details, you can use the “Show how results will look on a Dashboard” view. This will avoid adding additional columns and filters to your analysis.

1. Click the Show how results will look on a Dashboard icon to preview.
2. In the Dashboard Preview window, drill into hyperlinked values as desired to see the results.
3. When finished, click the delete icon in the upper right-hand corner to close the Dashboard Preview window.

Print

1. If you would like to print all of your rows, be sure to click on the double sided arrow at the bottom of your analysis to expand all of your rows prior to printing. If not, it will only print the first 25 rows.
2. Click the Print icon in the upper left hand corner.
3. Select either Printable PDF or Printable HTML. At this point you can print the output.

Export

1. Click the Export icon.
   a. PDF
   b. Excel - Formatting will be maintained. Limited amount of rows exported.
   c. Data > Tab delimited Format - Brings over the raw data (not formatting). Total row count exported.
      It is best practice to use Tab delimited Format when you want to analyze the data.
      *Both Excel and Data Tab Delimited have a row limit of 500,000 rows.

Sort

There is a dropdown menu for each data element when you hover over the three lines to the right. You can apply sorts by clicking the Sort option and then choosing “Sort Ascending” or “Sort Descending.”

1. Go to Criteria tab.
2. Sort Fiscal Year by descending by choosing “Sort Descending”.

To add a second sort, simply choose “Add Ascending Sort” or “Add Descending Sort.” A small blue number will appear in front of each field name to let you know where it falls in the sort order.

Sort Accounting Period by descending by choosing “Add Descending Sort.”

If you wish to clear one or all of your sorting selections, you may do so by clicking the options drop down menu on a column and selecting Clear Sort for that specific column or Clear All Sorts in All Columns for all of the columns.
Column Properties

Go to Criteria tab. Column properties opens up a dialog box where you can change numerous things about the appearance and functionality of the field.

1. Go to YTD Balance USD column and select the Column Properties icon.

   - Style properties change the data element’s formatting, including fonts, colors, borders, and alignment.
   - Column Format properties change the data element’s headings and value suppression settings.
   - Data Format properties allows you the change how the data element values get displayed. With numeric fields, for example, you can set the number of decimal places to display, choose to display a thousands separator, and define negative numbers.
   - Conditional Format lets you set formatting when specific conditions are met.

2. Style:
   a. Choose font Color, Style, and Background color.
3. Column Format:
   a. Check Custom Headings.
   b. In the “Column Heading” space, rename to “Balance”.
4. Data Format:
   a. Check “Override Default Data Format”.
   b. In “Treat Number As”, select Currency.
   d. In “Negative Format”, select Parentheses (red).
   e. In “Decimal Places”, select 0.
5. Conditional Format:
   a. Click Add Condition. Choose YTD Balance USD column.
   b. In the New Condition box, select “is less than” and type in “1000”. Click OK.
   c. In the Edit Format window, add the image of a red flag. Click OK.

Copy and Paste Style Format

If you want to copy and apply the style properties from one column to another:

1. Open the Column Properties window for the column from which you wish to copy the formatting.
2. On the Style tab, click the Copy Cell Format icon and click OK.
3. Open the Column Properties window for the column to which you want to apply the copied formatting and click the Paste Cell Format icon.
4. To restore the default setting and Clear Cell Format (eraser) icon.

Note: Changes made to a column in the Criteria tab will apply to all views within the analysis. Changes made to a column in the Results tab will apply only to that specific view.
Formulas

You can create a mathematical formula, which can range from simply adding two facts together to finding the percentage of two facts. You start by adding a data element of the same data type as the computed item (for example, if you want to create a new fact, choose a fact field). You are then going to rename the folder heading and column heading and delete the formula presently there. You have now created a “blank slate” to write a new formula.

1. Let’s create a formula for “% of Budget Spent.” Go to the Criteria tab.
2. Add any fact data element to your analysis.
3. Select the Edit Formula icon from the options drop down menu for the fact data element you brought in.
4. In the “Edit Column Formula” box, check Custom Headings.
5. Rename the Folder Heading to Calculated Field.
6. Rename the Column Heading to “% of Budget Spent”.
7. In the Column Formula box, delete the default formula presently there.
8. Create the following custom formula:

   \[
   \frac{(\text{YTD Actual USD} + \text{YTD Encumbrance USD})}{\text{YTD Revised Budget USD}} \times 100
   \]

   To Add Columns: go to either:

   a. Column: Select the data element by using the Column drop-down list. This allows you to select columns that are already in your analysis, even if they have been renamed or given a new formula.

   b. Subject Areas section: Highlight the data element and click on the blue arrow to add to the Column Formula. This allows you to select columns that are not already included in your analysis.

To input Operators, select them from the operators bar or type them in manually.

Note: When you write your formula, it will display differently. Our formula will display as follows:

\[
\left(\frac{\text{YTD Actual USD} + \text{YTD Encumbrance USD}}{\text{YTD Revised Budget USD}}\right) \times 100
\]

9. When finished, click OK.
10. Make this column have a percentage sign by selecting Column Properties from the drop down box. Go to the Data Format tab and check “Override Default Data Format”. In “Treat Number As” select Percentage.
11. Run Results. Save your analysis.
Exercise 1: Create a Budget Detail Report

Create an analysis that shows: detailed Revenue and Expense transaction amounts for your Org for this FY.

1. Create a new Analysis.
2. Select the Subject Area Budget Detail.
   Note the additional folders in the Budget Detail subject area.

3. Add the following data elements.
   - Fund
   - Org
   - Account
   - Account Class
   - Account Category
   - Journal Date
   - Journal Id (Journal Doc Detail folder)
   - Jrnl Ref / PO / Vchr (Journal Doc Detail folder)
   - Source (Journal Doc Detail folder)
   - Vendor Long Description (Vendor folder)
   - Fiscal Year (Accounting Period Folder)
   - Fiscal Quarter Abbreviation
   - Actual USD (USD Currency)
   - Encumbrance USD (USD Currency)
   - Pending USD (USD Currency)

4. Add the following Filters:
   - Account Tree Name is equal to/ is in WSQBC (Note: column was not added. See pg. 6)
   - Fund Code is equal to/ is in [choose your own Fund]
   - Org Code is equal to/ is in [choose a few Org’s]
   - Account Code is between 40000 and 89999 (column was not added) OR Account Class is equal to/ is in Revenue; Expense (Either filter will yield the same results.)
   - Fiscal Year is equal to/ is in 2015

5. Run Results.
6. By default, UDW+ will group columns together by their folder structure. Rearrange the columns by dragging and dropping them.
   1) Make Fiscal Year and Fiscal Quarter Description be the first columns.
   2) Make Account to be after Account Category.
7. Save your analysis in My Folder as “Budget Detail Report”.

Note: A row with an empty date field (such as Journal Date) will display a default date of "1/1/1753" rather than the standard "." null value. Please take this into account should you need to create a filter for "null" dates.

You have completed Exercise 1!
Views

Rename
Add
New
Delete/Remove

Removing a view from the compound layout means to “hide” the view. It doesn’t delete the view altogether. It remains accessible via the Views section and can be re-added to the compound layout. Removing a view from the analysis in the Views section deletes the view completely. It will no longer be available for future use.

1. Remove the Table view from the compound layout.

Duplicate

DO NOT press the Duplicate View button in the Views section. This will crash the server.

Pivot Table

1. One way to add a New View is to go to the Results tab and click the New View icon in the top toolbar.

2. Select Pivot Table. A Pivot Table view will be added to the bottom of the Compound Layout.
Edit Mode

To Edit any view, scroll to the far right and click the Pencil icon. This will bring you to the Edit Mode/ Layout Pane for that view, where you can add totals, change headings, exclude fields, and much more.

It’s a good idea to uncheck Display Results icon in the upper toolbar while modifying your analysis. This prevents the results from being displayed in the Editing section, which can improve performance.

Scroll down to find your Pivot Table. Click the pencil icon to edit.

Let’s show each vendor’s actuals and encumbrances are by quarter. Make the following edits to the Pivot Table:

- **Measures** = where you put value data elements you want to appear in the pivot table

Totals

**Totals** = lets you add, remove, and format a variety of grand and subtotals.

1. In the toolbar for Table, click the pencil icon to edit.
2. For **Account Category** and **Account Class**, click the Sum icon and select “After”.

Thinking Point: Why would you not create a Grand Total in this analysis?

Prompts

Move a dimension to the top of the report, creating a dropdown box for the filtered items for that dimension.

Prompts should include: **Fund** and **Org**.

To make changes, drag fields into different sections of this pane and when you see the blue line, drop it in.

Sections

Divides into different sections.

Sections should include: **Account Class**.

Exclude

Hides a data element that you don’t want to see in your report.

Exclude data elements: **Journal Date**, **Journal ID**, **Jrnl Ref/ PO/ Vchr**, **Source**, and **Pending**.
**Columns** (only in Pivot Table)

Columns should include: **Fiscal Year** (first) and **Fiscal Quarter Description** (second) as shown below.

**Rows**

Rows should include: Vendor Long Description, Account Class, Account Category and Account.

1. Click **Done** to view the results. You should see a row for each Vendor.
2. Now, let’s view each **Vendor** by **Fiscal Quarter** by **rearranging** our columns and rows.
   d. **Grab** the “First Quarter Description” column by hovering over the column name and grabbing the tab on the left.

   e. **Drag** it directly to the left of Vendor Description until you get a light-blue line to the left.
   f. **Drop** the column to see the table re-pivot.

   Please do not re-pivot large data sets as it will crash the system.

Save your Analysis.

3. Click **Done**.

**Right-Click Shortcuts**

From the Results tab, there are shortcuts to several commands, such as Sort Column, Show Subtotal (After Values), Exclude Column, Move Column> To Prompts. Simply right-click and choose your option.

4. Set **Project** as a **Table Prompt** directly from the Pivot Table view by right-clicking on the column header and selecting **Move Column > To Prompts**.
Exercise 2: Create a Yearly Trending Report

Create a four year trending report for fiscal years 2011-2014 that shows your year-to-date expenses for your division or dept. Show your orgs, account class, and account category. Be sure to filter on the last accounting period of the fiscal year. Add a pivot table that shows: a) your fiscal years as columns, b) totals your actuals by account class and c) has fund and org as a prompt. Show only your Pivot Table and Title in your compound layout. Save your report.

Hints: Use Budget Summary subject area. Division and Dept are located under Org.

Note: When creating a trending report using only YTD Actual, it is important to remember to either filter (or create a prompt) on an Accounting Period or show the column for Accounting Period. Otherwise, the YTD Actual column will aggregate the YTD amounts for each accounting period for those years.

You have completed Exercise 2!

Note: Visit the Reporting Tips and Tricks folder in the Catalog for a more detailed and visual example of YTD Actuals versus Monthly Actuals: Catalog→Shared Folders→School and Administrative Folders→Authorized Analyses→DSG→Commonly Created Reports→Reporting Tips and Tricks→What is the difference between Monthly and YTD?

How do I compare current YTD actuals with prior years? (e.g. 2012-2015)

- Use Monthly Actuals instead of YTD Actuals. Delete filter for Accounting Period and create filter using a repository variable for Accounting Period Code = CURRENT_PERIOD.
Graph

Let's create a **Bar Graph** visualizing your yearly trending report.

1. **Add a New View** icon in the top toolbar and select **Graph > Bar > Vertical**. UDW+ will attempt to create a visualization based on your data set and type of Graph selected (this almost always needs to be edited).

2. **Edit** the Graph. When you **drag** data elements into different sections, you'll see a light blue block.

   a. **Measures- Bars (Vertical Axis)** should include: **YTD Actual**
   b. **Bars “Group By” (Horizontal Axis)** should include: **Fiscal Year**
   c. **Prompts** should include: **Fund and Org**
   d. **Excluded** should include: **Account Class and Account Category**

3. Click **Done**. **Save** your analysis.
**Bins**

Using Bins is a way to group values together into their own custom groups. Bins can group multiple values into smaller simpler groups thereby helping end users to analyze their data better.

Let’s create bins for Personnel Expenses that show variable appointments, fixed appointments, and fringe categories.

1. Add the following data element: **Account Code**
2. Add Filter:
   - **Account Category is equal to/ is in Personnel Expense**
3. In the **Account Code** column, click the options drop-down menu and select “Edit Formula”.
4. Go to the second tab, called **Bins**.
5. In the lower left corner click **Add Bin**.
   - In the New Filter window, set **Account Code is equal to 51103;51112;51113;51119**.
   - When prompted, edit the **Bin Name** to “Variable appts”. Click OK.
6. Add another Bin:
   - **Account Code is equal to 51100;51102**
   - **Bin Name** is “Fixed appts”
7. Add another Bin:
   - **Account Code is equal to 51170**
   - **Bin Name** is “Fringe”

Your bins should look like this:

8. When finished creating the three bins, click **OK**.
9. Run **Results**. You should see the Personnel Expenses that show variable appointments, fixed appointments, and fringe categories.
10. Save your analysis.
XML Code
Sharing XML codes is a great way to troubleshoot any issues you may be having with your analysis or sharing your analysis with another user. You may be asked to send your XML code to the DSG Analyst or another user for troubleshooting.

Obtaining and Sending XML Codes:
1. In your analysis, go to the Advanced tab.
2. Under Analysis XML, highlight and copy the entire section (Ctrl+A to select all and Ctrl+C to copy).

3. Paste it into a Word Doc and email to the appropriate person.

Applying XML Codes:
If someone sends you XML code that you wish to apply:
1. Create a new analysis using any subject area.
2. Go to the Advanced tab.
3. In the Analysis XML section, Delete any code that is currently there.
4. Copy the entire contents of the XML code that was sent to you.
5. Paste the XML code into the Analysis XML section (using Ctrl+V to paste).
6. Click Apply XML.
7. Go to the Results tab to run the analysis.
Authorized Analyses- DSG

- Visit Catalog \(\Rightarrow\) Shared Folders \(\Rightarrow\) School and Administrative Folders \(\Rightarrow\) Authorized Analyses- DSG \(\Rightarrow\) Financial Reporting \(\Rightarrow\) Common Reports/ Templates for useful ad hoc reports and templates.
- Choose More \(\Rightarrow\) Copy.

- Then go to My Folders and either Right-Click and choose Paste or choose the Paste icon in the Catalog header.
- Remember to change the filters on the report to suit your needs.
Exercise 3: Create an Analysis that shows difference between Original and Revised Budget

Create an ad hoc analysis using the Budget Summary subject area that shows only your Expenses for FY 2013 and 2014 for your Org. Show your YTD Original Budget, YTD Revised Budget, and YTD Actuals. Create a separate column with a formula that calculates the difference between the YTD Original Budget and YTD Revised Budget (see page 11 for how to create a formula). Create prompts for Fiscal Year and Accounting Period (see page 16 for how to create prompts).

<table>
<thead>
<tr>
<th>Fund</th>
<th>Org</th>
<th>Account Class</th>
<th>YTD Original Budget USD</th>
<th>YTD Revised Budget USD</th>
<th>YTD Actual USD</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 - Operating</td>
<td>55000 - Dean's Office</td>
<td>Expense</td>
<td>290,834.28</td>
<td>291,648.27</td>
<td>285,629.84</td>
<td>-614</td>
</tr>
</tbody>
</table>

You have completed Exercise 3!
**Inserting a Narrative**

You can create a Narrative view to provide information such as context, explanatory text, or extended descriptions about the analysis.

- Author of analysis
- Last Updated/modified date
- Intended Purpose of analysis
- Intended Audience of the content

1. Go to New View and click on Other Views > Narrative.

2. Find Narrative at the bottom of your analysis, and drag it to be below the Title.

3. Click the pencil icon to edit.

4. In Narrative box, type in:
   - **Author**: (You Name)
   - **Last Updated**: (Today’s Date)
   - **Report Description**: (Intended Purpose of Analysis)

5. Be sure to insert “1” for Rows to display.

6. **Bold** where needed and insert **Line Breaks** after each section. Click “Done.”

7. To modify justification, click **Formatting** icon for Narrative, and choose **Horizontal Alignment “Left”**. Click OK.
Congratulations! You have successfully completed the FIN 850: UDW+ Ad Hoc Reports Training course!

Recommended System Settings/Evaluation/Additional UDW+ Courses/Contact

Recommended System Settings
- UDW+ Client
- Adobe Flash Player
- Adobe Reader
- VPN (if working outside of NYU network)

Evaluation
You will receive a completion email from iLearn containing a link to the UDW+ Classroom Training Survey. Please take a moment to complete this short evaluation. Your feedback will help ensure that the course effectively addresses the needs of the UDW+ community.

Additional UDW+ Courses
- FIN 851: UDW+ Ad Hoc Reports Training Online Refresher
- FIN 855: UDW+ Commonly Created Ad Hoc Reports
  - AP Payment
  - AP Purchase Order
  - Budget Summary Monthly
  - Year Over Year
  - Fund Balance Trend

Contact
The Decision Support Group (DSG) is here to help!
- Email: askDSG@nyu.edu
- Phone: 212-998-2900
  - UDW+ Functionality Video
  - UDW+ FIN 850 Ad Hoc Reports Guide
  - UDW+ Ad Hoc Reports Video Tutorials
  - UDW+ Ad Hoc Common Reports/ Templates