UDW+ Quick Start Guide to Functionality

Version 1.6

Program Services Office & Decision Support Group
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Access

UDW+ Financial Reporting Training and Access
UDW+ HR Reporting Training and Access
UDW+ Student Reporting Training and Access

Log in/System Requirements

1. To log into UDW+, navigate to https://udwplus.nyu.edu/analytics and log with your NYU net id and password.

2. Note that if you’re working outside of the NYU network, you will need to connect to VPN prior to logging in.

Data Refresh

UDW+ is refreshed overnight, every night. The refresh time and date will appear at the top of each dashboard or report in the header section as shown in the example below.
00. FAME Chartfield Security Report

**Purpose:** Check your current Financials and Salary Expense chartfield security.

1. Click on the drop-down for **Netid**. Click on **More/Search**...
2. Type in your net id and click **“Search”**. Highlight it so it turns **blue**, and then click **OK**.
3. Click **Apply** to run the report.

Chartfield Access

Chartfield security determines results. Any monetary amounts that are displayed will be restricted by your chartfield security. For example, a purchase order may be issued for multiple chartfields. If you are viewing a purchase order that contains chartfields outside of your authorized access, you will not see all of the lines that contribute to the total purchase order amount.

Need to modify your Chartfield Access? Go to NYU Home → Work tab → Administrative Systems → **Chartfield Access Authorization Form**. Contact FinanceLink at askfinancelink@nyu.edu or 212-998-1111 for assistance.
Navigation/Catalog

Home Page

The Home Page is the default start page for UDW+. It is comprised of several sections to help you find the content most useful to you.

**Home**: to return you to the Home page  
**Catalog**: folder directory containing your personal folder as well as shared folders  
**Favorites**: allows you to save most commonly viewed dashboard pages as your favorites  
**Dashboards**: list of available dashboards and analyses available to you  
**New**: opens a list of ad hoc content objects that you are eligible to create

Catalog

The Catalog contains shared folders for dashboards and reports that other schools and departments have developed. Please note that shared folders are based on security permissions, and your access will likely vary from the example shown below.

You may view any shared reports for a subject area that you have access to view. Please contact the Decision Support group for the school or department representative for shared content.

Open a Dashboard or Standard Report

From the Header, select **Dashboards**.
The **Dashboards** menu displays a list of Dashboards and Standard Reports that you can access. Your login, chartfield access and training completion status determine which links display. From the menu, select the Dashboard or Standard Report that you wish to access.

Each Dashboard can contain many different pages, which are represented by tabs. Page tabs display below the dashboard name. To navigate to the next page, click on the corresponding tab.
“About this Dashboard” and “About this Page” Metadata

Below the title of each dashboard, there are two links that provide access to the metadata and wiki pages about the selected dashboard.

- About this dashboard
- About this page

“About this dashboard” opens a DSG Wiki page with an overview of the dashboard.

“About this page” opens a DSG Wiki page with detailed metadata, useful information, and use notes about each report and graph displayed on the selected page.

It is highly recommended to reference these pages whenever you have any questions about the data on the dashboard.

Prompts
Select from Dropdown Box

Dashboard pages contain prompts in order to filter the result data. Required prompts are indicated by the asterisk (*) to the left of the prompt name.
To view the available prompt selections, click on the drop-down arrow. Make a selection from the available options. Then step off of the prompt by clicking in the whitespace. If you do not make any selection, then it will bring back all of the chartfields that you have access to. Remember to select on option for the prompts with an asterisk (*). Then click the “Apply” button to generate your results.

**Search**

The Search option is useful when a prompt has a long list of choices, when you want to search for your selection, or when you want to select multiple values. Click the dropdown arrow, and then the Search…

To begin your search, choose your search function (“Starts”, “Contains”, “Ends”, “is Like”), and then type in your search terms. Click the “Search” button. The “Name” box will populate with your results. Be sure to uncheck “Match Case” as it is case-sensitive.
Once you find your value, highlight it so it turns blue and click the "Move" arrow > to move your value to the "Selected" area. You may move multiple values individually, or you may click the "Move All" double arrows >> to move the entire returned list. Click "OK" when you have selected all of the needed values.

When the desired values are selected, click OK. Then click Apply to view your results. Please note that the “Apply” button will be grayed out until all required prompts are set.

More Search Options
Check this box if you would like additional prompts to search by.
Drill/Rollup/Sort/Rearrange Columns

Drilling

Most sections of the page allow users to drill down into the student list to see the corresponding student population. Links are indicated by blue text.

Click on a **blue link** to drill down.

The report will open in a separate window. To return to the prior report, use the **“Return”** link (if available), or close the newly created browser window.

Roll ups

Some dashboards and reports provide the ability to "roll up" or display the data based on Fund, Org, Project or Program or other chartfields. For example, if you roll up to Program, you will display that Program aggregated at the Program level. If you roll up to Fund, it will aggregate all of the chartfields at the Fund level.

Sort

A report can be sorted by any column. Hover your mouse over the column and two arrows will appear, one pointing up for an ascending sort, and one down for a descending sort.

You may also right-click the column, which will bring up the menu shown in the image below. The second item listed on the menu is the **“Sort”** feature. This also allows you to sort by multiple columns by choosing the **"Add Ascending Sort"** or **"Add Descending Sort"** to the additional columns in your sort.
Rearrange Columns

1. Hover over the column or prompt to be moved, which will display the handlebar.

   **Registrations by Degree Level by School**
   *(Total Distinct Headcount)*

<table>
<thead>
<tr>
<th>Student Reporting School</th>
<th>Degree Level</th>
<th>Registration Status</th>
<th>Student Academic Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>AD Office of the Provost</td>
<td>Undergraduate</td>
<td>Enrolled</td>
<td>NYU Abu Dhabi</td>
</tr>
<tr>
<td>CUSP</td>
<td>Graduate</td>
<td>Enrolled</td>
<td>Ctr for Urban Sci and Progress</td>
</tr>
<tr>
<td>Centers and Institutes</td>
<td>Graduate</td>
<td>Enrolled</td>
<td>Graduate School Arts &amp; Science</td>
</tr>
</tbody>
</table>

2. **Grab** the handlebar or prompt and **drag** it to its new location. A light blue line will display, showing you where the column will land as see in the image below.

3. **Release** the column and the report will rerun to display the results in the manner you have chosen.

   **Registrations by Degree Level by School**
   *(Total Distinct Headcount)*

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Exclude Columns

1. **Right click** on the column you would like to “hide” and choose “**Exclude Column**.”
Breadcrumbs

Assist users in knowing their current location in UDW+. Breadcrumbs are active links that can be ‘clicked’ to return to the place from which the user navigated (most useful when navigating and drilling in a dashboard into other reports).

Print

Print the entire dashboard page

1. Printing from the Page Options menu will print the entire dashboard as displayed on your screen. On the right hand side of the screen, underneath the Global Header, there is a three line icon that is the “Page Options” menu.
2. From this menu, select to Print.
3. Print format options include either in Printable PDF (requires Adobe Acrobat plug-in) or HTML.
4. It is recommended to use this print option, as it will print the entire dashboard page, including the prompt selections. So it is clear on the print-out what parameters were used to display the data.
Print an individual report or graph

1. Beneath a report or graph, there is a link to "Print".

   Analyze - Edit - Refresh - Print - Export - Copy

   Total Display Range
   Printable PDF
   Printable HTML

2. Print format options include either in Printable PDF (requires Adobe Acrobat plug-in) or HTML.
3. When printing a table, be sure to display all rows first.

   Rows 1 - 2000

4. Printing using this method will not print the entire dashboard. It will only print the component of the dashboard immediately above the Print link. Unlike the dashboard print options, it does not include the prompt selections. This could cause other uses to misinterpret the data if they do not know the parameters that were used. We therefore always recommend printing the entire dashboard page so that it is clear what parameters were used to display the data.

Print from BI Publisher

Several reports (such as the Budget Summary report) are created in BI Publisher. Unlike other Dashboard reports, this type of report is non-interactive and static in order to produce printer-friendly reports. Such reports are indicated with "PDF" in the page name.

To print a BI Publisher report, click the Print icon that displays when you hover over the report.

*Problems with BI Publisher- Any field with a "+" symbol will cause the BI Publisher report to not yield any results. This is because the "+" symbol is stripped out when run in the BI Publisher report"s SQL, which yields no results.
Export

Export from a PC

1. Beneath a report or graph, there is a link to "Export".

2. Export options include:
   a. **PDF.** Exporting is limited to 200,000 records.
   b. **Excel-** Formatting will be maintained. Exporting is limited to 200,000 records.
   c. **PowerPoint 2003** or **2007**
   d. **Web Archive**
   e. **Data >**
      i. **CSV Format** (Comma Separated Values). Limit of 500,000 records with max cell limit of 2,000,000 across formats.
      ii. **Tab delimited Format**- Best Practice. Brings over the raw data (not formatting). Total row count exported.
Exporting to Excel from a Mac

1. **Use the "Export > Data > Tab delimited Format" option and open the file in Excel.**

   The “Export > Excel” feature is **not available** for Mac users. The UDW+ export to Excel data type is not XLS (even though the file extension is), but is actually an MHTML file with XLS extension. Mac Office doesn’t read MHTML correctly, as Windows versions of Office can read MHTML.

Exporting BI Publisher Reports

2. **For BI Publisher reports**, such as the **Budget Detail Reports** and **Budget Summary Report PDF**, go to the **Data** tab and click on the gear icon located in the middle of the screen, towards the right.
3. Choose **Export > CSV**.
4. Choose **Open with Microsoft Excel** or **Save File**.
5. If you choose “Open with”, then choose **Microsoft Excel**.

If you choose “Save File”, then it will download to your “Downloads” area of your computer in CSV format.
**Contact the Decision Support Group**

The **Decision Support Group** (DSG) is here to help!

- Email: askdsg@nyu.edu
- Phone: 212-998-2900
- Web: [Decision Support Group](#)