



# UDW+ Quick Start Guide to Functionality

**Version 1.6**

Program Services Office & Decision Support Group

**Table of Contents**

Access .....2

Log in/System Requirements .....2

Data Refresh.....2

00. FAME Chartfield Security Report .....3

Navigation/Catalog.....4

“About this Dashboard” and “About this Page” Metadata.....6

Prompts.....6

Drill/Rollup/Sort/Rearrange Columns.....9

Exclude Columns .....10

Print.....11

Export .....13

Contact the Decision Support Group .....16

## Access

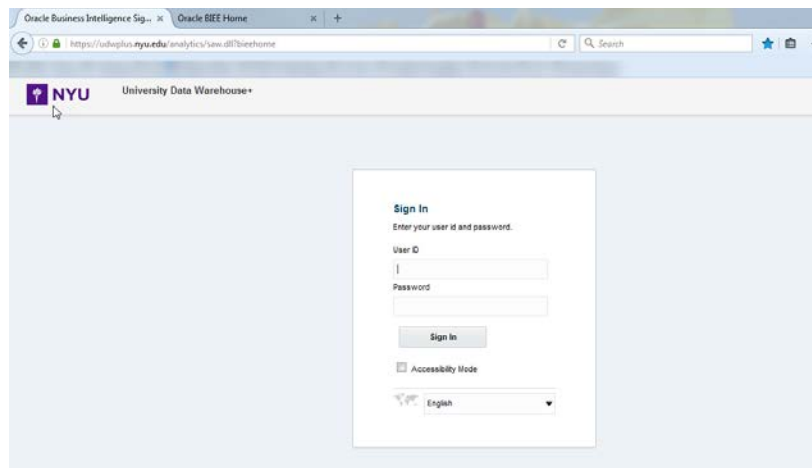
[UDW+ Financial Reporting Training and Access](#)

[UDW+ HR Reporting Training and Access](#)

[UDW+ Student Reporting Training and Access](#)

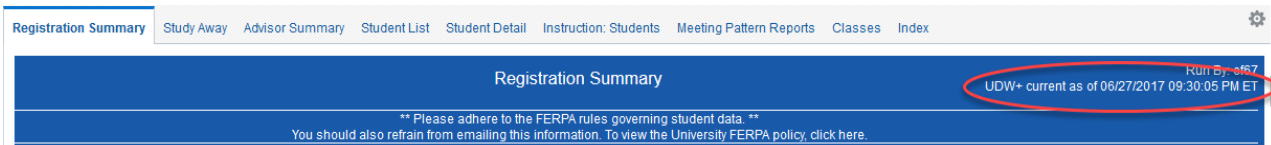
## Log in/System Requirements

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.

00. FAME Chartfield Security Report Alerts! Home Catalog Favorites Dashboards New Open Signed In As

---

Netid  OR Name

---

### FAME Chartfield Security Report

Security Type: Financials

Net Id	Name	Business Unit Id	Fund Code	Org Code	Program Code	Project Id	Account Code	Include Flag		
EF67	Flory, Erica	ABU01	71	00000 - 99999	00000 - ZZZZZ	A0000 - ZZZZZ	00000 - 99999	Y		
			72	00000 - 99999	00000 - ZZZZZ	A0000 - ZZZZZ	00000 - 99999	Y		
			73	00000 - 99999	00000 - ZZZZZ	A0000 - ZZZZZ	00000 - 99999	Y		
			74	00000 - 99999	00000 - ZZZZZ	A0000 - ZZZZZ	00000 - 99999	Y		
				ACR01	91	00000 - 99999	A0000 - ZZZZZ	A3631 - ZZZZZ	00000 - 99999	Y
				ADH01	71	00000 - 99999	00000 - ZZZZZ	00000 - ZZZZZ	00000 - 99999	Y
					72	00000 - 99999	00000 - ZZZZZ	00000 - ZZZZZ	00000 - 99999	Y
					73	00000 - 99999	00000 - ZZZZZ	00000 - ZZZZZ	00000 - 99999	Y
					74	00000 - 99999	00000 - ZZZZZ	00000 - ZZZZZ	00000 - 99999	Y
					75	00000 - 99999	00000 - ZZZZZ	00000 - ZZZZZ	00000 - 99999	Y
					76	00000 - 99999	00000 - ZZZZZ	00000 - ZZZZZ	00000 - 99999	Y
					77	00000 - 99999	00000 - ZZZZZ	00000 - ZZZZZ	00000 - 99999	Y
			78	00000 - 99999	00000 - ZZZZZ	00000 - ZZZZZ	00000 - 99999	Y		
			79	00000 - 99999	00000 - ZZZZZ	00000 - ZZZZZ	00000 - 99999	Y		
		BRL01	97	00000 - 99999	A0000 - ZZZZZ	A0000 - ZZZZZ	00000 - 99999	Y		
		BUA01	98	00000 - 99999	A0000 - ZZZZZ	A0000 - ZZZZZ	00000 - 99999	Y		
		FLR01	62	00000 - 99999	A0000 - ZZZZZ	A0000 - ZZZZZ	00000 - 99999	Y		
			64	00000 - 99999	A0000 - ZZZZZ	A0000 - ZZZZZ	00000 - 99999	Y		

### 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](mailto:askfinancelink@nyu.edu) or [212-998-1111](tel: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

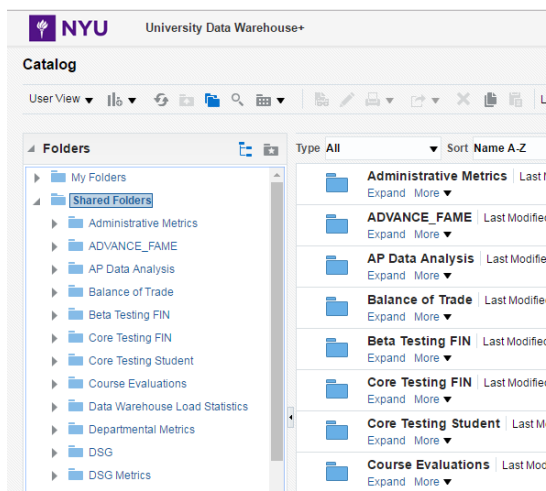
**Catalog:** folder directory containing your personal folder as well as shared folders

**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.

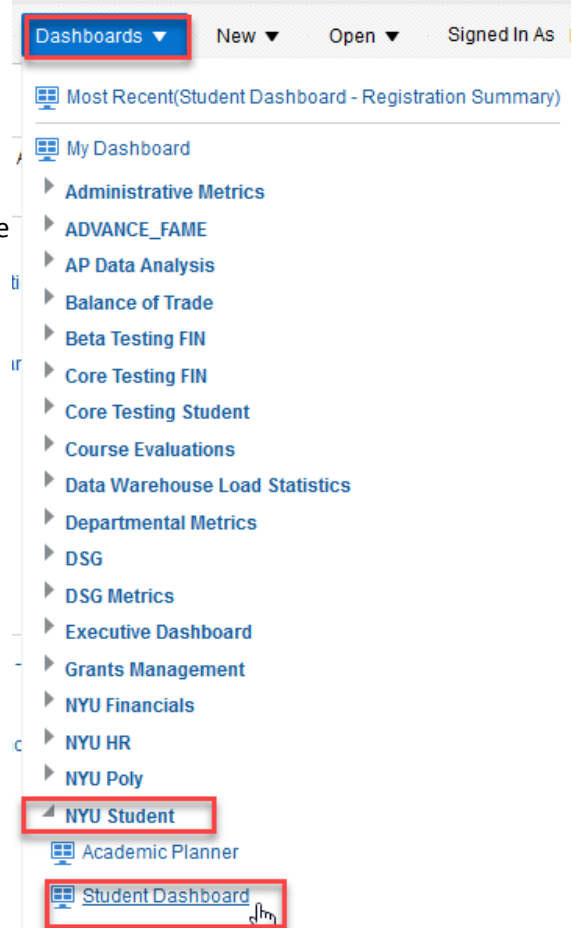
You may view any shared reports for a subject area that you have access to view. Please contact the Decision Support group for the school or department representative for shared content.

### 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

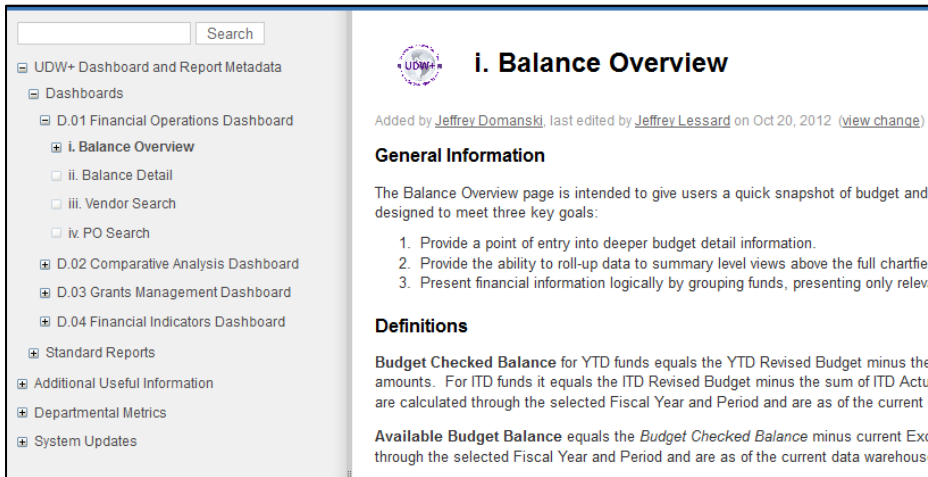
Below the title of each dashboard, there are two links that provide access to the metadata and wiki pages about the selected dashboard.

[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.

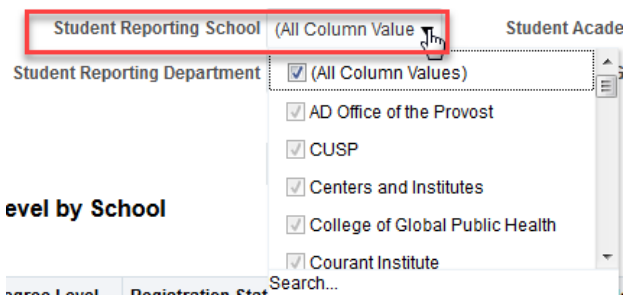
It is highly recommended to reference these pages whenever you have any questions about the data on the dashboard.



## 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.

A screenshot of a web form with several dropdown menus. The fields are: Student Academic Group (College of Dentist), Program (All Column Value), Plan (All Column Value), Study Away Agreement (All Column Value), Student Academic Group Code (All Column Value), Program Code (All Column Value), Plan Code (All Column Value), Study Away Agreement Code (All Column Value), and Plan Type (Major Approved;M). The 'Apply' button in the bottom right corner is circled in red.

### 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...**

A screenshot of a dropdown menu for 'Student Reporting School'. The menu is open, showing a list of options: (All Column Values), AD Office of the Provost, CUSP, Centers and Institutes, College of Global Public Health, and Courant Institute. A search box with the text 'Search...' is circled in red at the bottom of the dropdown.

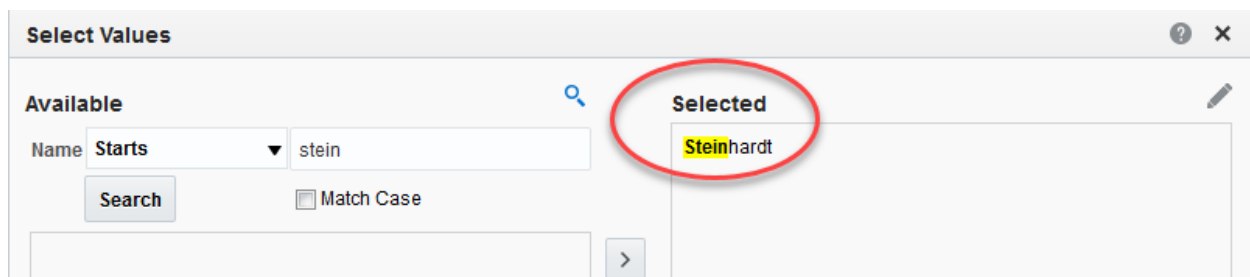
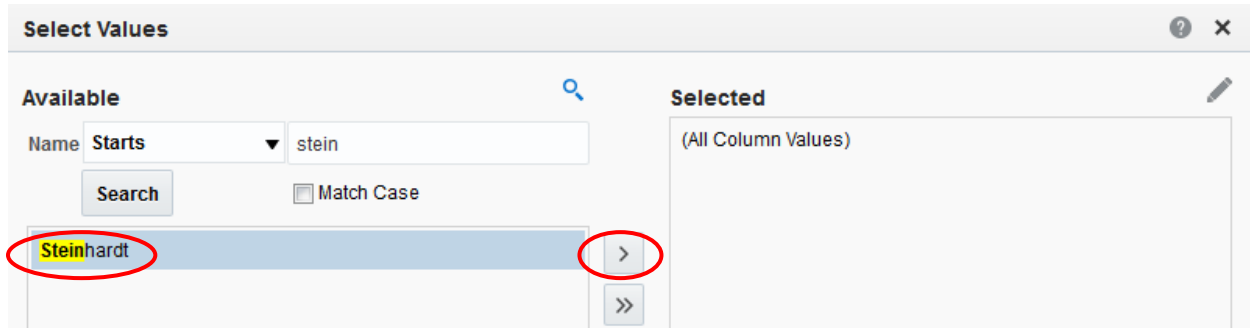
To begin your **search**, choose your search function ("Starts", "Contains", "Ends", "is Like"), and then type in your search terms. Click the "Search" button. The "Name" box will populate with your results. Be sure to uncheck **"Match Case"** as it is case-sensitive.

A screenshot of a 'Select Values' dialog box. The 'Available' section shows a 'Name' dropdown menu with 'Starts' selected. A dropdown menu is open below it, showing options: Starts, Contains, Ends, and is Like (pattern match).

A screenshot of a 'Select Values' dialog box. The 'Available' section shows a 'Name' dropdown menu with 'Starts' selected. The search box contains the text 'stein'. Below the search box is a 'Search' button and a 'Match Case' checkbox, which is circled in red.



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.

Term	Summer 2017:Sp	Student Reporting School	Steinhardt	Student Academic Group	(All Column Value)	Registration Status	Enrolled
Term Code	--Select Value--	Student Reporting Department	(All Column Value)	Student Academic Group Code	(All Column Value)	Plan Type	Major Approved:M

**Apply**

### More Search Options

Check this box if you would like additional prompts to search by.

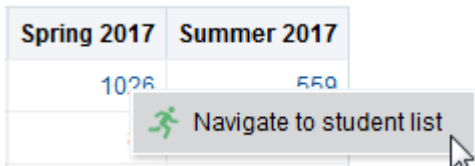
<b>More Search Options</b> <input checked="" type="checkbox"/>	Term	Summer 2017:Sp	Student Reporting School	(All Column Value)	Career	(All Column Value)	Primary Plan	(All Column Value)
	Term Code	--Select Value--	Student Reporting Department	(All Column Value)	Program	(All Column Value)	Primary Plan Code	(All Column Value)
	Term Type	(All Column Value)	Student Academic Group	(All Column Value)	Program Code	(All Column Value)	Subplan	(All Column Value)
	Academic Year Label	(All Column Value)	Student Academic Group Code	(All Column Value)	Plan	(All Column Value)	Subplan Code	(All Column Value)
			Registration Status	Enrolled	Plan Code	(All Column Value)	Academic Level	(All Column Value)
			Plan Type	Major Approved:M			Study Away Country	(All Column Value)
							Study Away City	(All Column Value)

## 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.

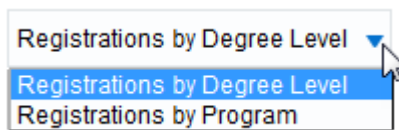
Click on a **blue link** to drill down.



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.

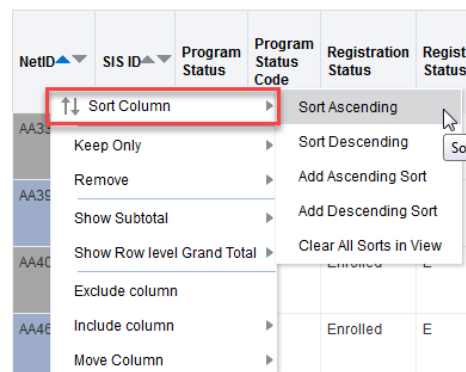


### Sort

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)

Student Reporting School	Degree Level	Registration Status	Student Academic Group
AD Office of the Provost	Undergraduate	Enrolled	NYU Abu Dhabi
CUSP	Graduate	Enrolled	Ctr for Urban Sci and Progress
Centers and Institutes	Graduate	Enrolled	Graduate School Arts & Science

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.

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

Student Reporting School	Degree Level	Registration Status	Student Academic Group
AD Office of the Provost	Undergraduate	Enrolled	NYU Abu Dhabi
CUSP	Graduate	Enrolled	Ctr for Urban Sci and Progress
Centers and Institutes	Graduate	Enrolled	Graduate School Arts & Science

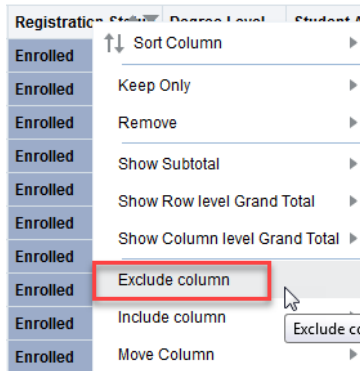
3. **Release** the column and the report will rerun to display the results in the manner you have chosen.

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

Student Reporting School	Registration Status	Degree Level	Student Academic Group
AD Office of the Provost	Enrolled	Undergraduate	NYU Abu Dhabi
CUSP	Enrolled	Graduate	Ctr for Urban Sci and Progress
Centers and Institutes	Enrolled	Graduate	Graduate School Arts & Science

**Exclude Columns**

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



## Breadcrumbs

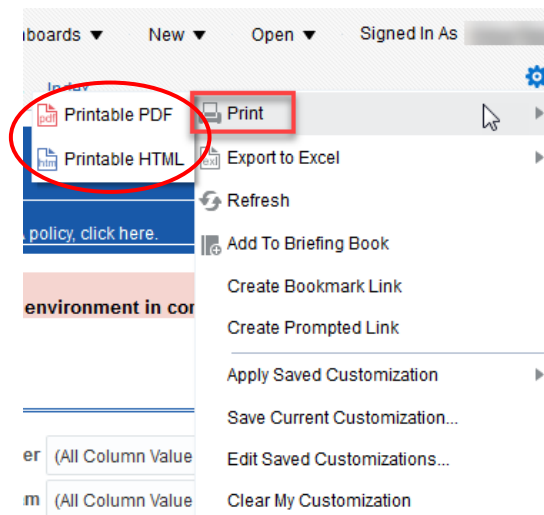
Assist users in knowing their current location in UDW+. Breadcrumbs are active links that can be 'clicked' to return to the place from which the user navigated (most useful when navigating and drilling in a dashboard into other reports).

Student Dashboard: Registration Summary > Student Dashboard: Student List > Student Dashboard: Student Detail

## Print

### Print the entire dashboard page

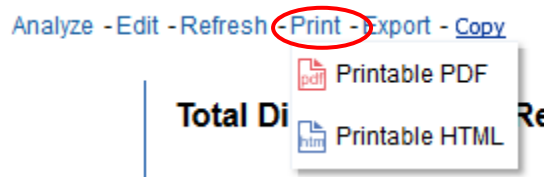
1. Printing from the Page Options menu will print the entire dashboard as displayed on your screen. On the right hand side of the screen, underneath the Global Header , there is a three line icon that is the "**Page Options**" menu.
2. From this menu, select to **Print**.



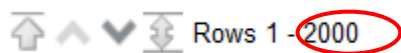
3. Print format options include either in **Printable PDF** (requires Adobe Acrobat plug-in) or **HTML**.
4. It is recommended to use this print option, as it will print the entire dashboard page, including the prompt selections. So it is clear on the print-out what parameters were used to display the data.

### Print an individual report or graph

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



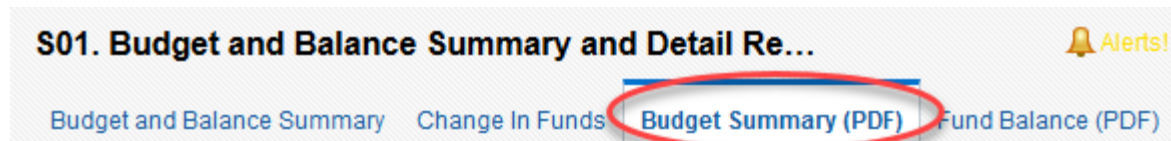
2. Print format options include either in **Printable PDF** (requires Adobe Acrobat plug-in) or **HTML**.
3. When printing a table, be sure to **display all rows** first.



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 users 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.

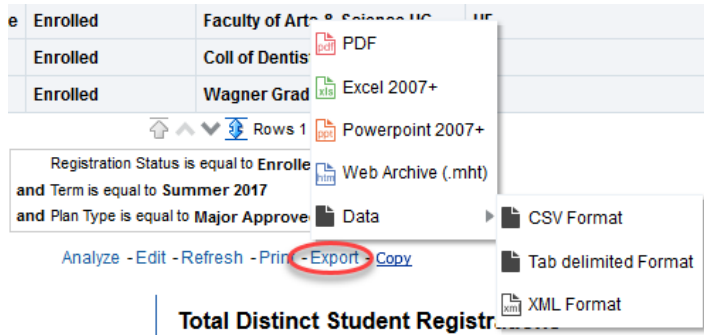


\*Problems with BI Publisher- Any field with a "+" symbol will cause the BI Publisher report to not yield any results. This is because the "+" symbol is stripped out when run in the BI Publisher report's SQL, which yields no results.

## Export

### Export from a PC

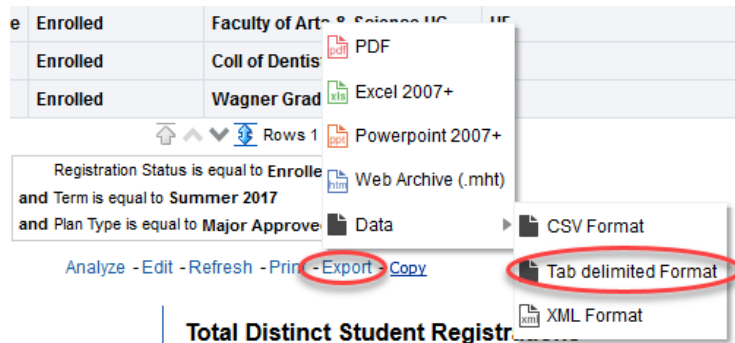
1. Beneath a report or graph, there is a link to "**Export**".



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

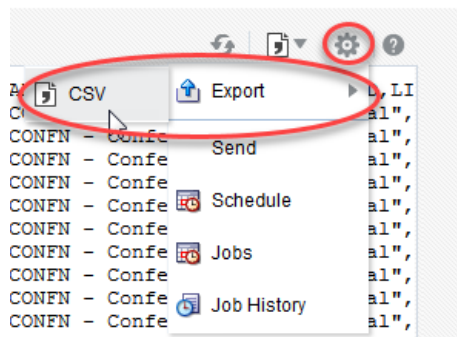
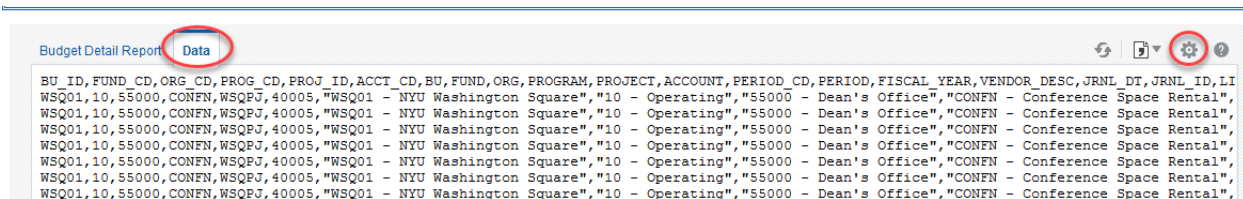
1. Use the "Export > Data > Tab delimited Format" option and open the file in Excel.



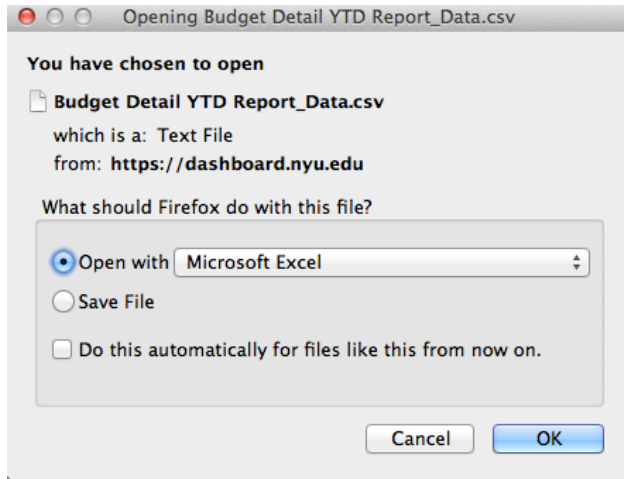
The "Export > Excel" feature is *not available* for Mac users. The UDW+ export to Excel data type is not XLS (even though the file extension is), but is actually an MHTML file with XLS extension. Mac Office doesn't read MHTML correctly, as Windows versions of Office can read MHTML.

### Exporting BI Publisher Reports

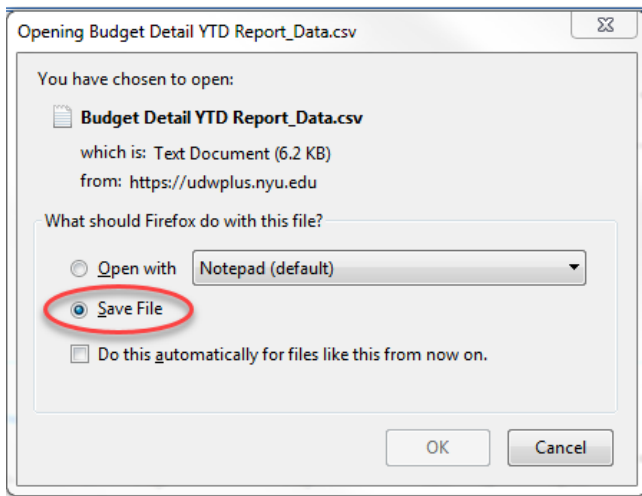
2. For **BI Publisher reports**, such as the **Budget Detail Reports** and **Budget Summary Report PDF**, go to the **Data** tab and click on the gear icon  located in the middle of the screen, towards the right.
3. Choose Export > CSV.
4. Choose **Open with Microsoft Excel** or **Save File**.



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