



This *Quick Guide* details how to navigate the reporting platform to access and generate HR Data reports. The BI Launch Pad has a tile interface with easy access to reports. To access HR Data Reports, go to my.columbia.edu, click the **HR Manager** tab, click the Reports tab, select **HR Manager Reports**.



BI Launch Pad

- Home**: Favorites, Recent Documents, Recently Run, Applications
- Folders**: Use the **Folders** tile to access reports for which you have access.
- Categories**: You can create **Categories** and tag reports to them to organize your personal view.
- Documents**: Use the **Tabs** to quickly move to different sections of the Home page instead of using the scroll bar.
- BI Inbox**: Use the **Documents** tile to view a comprehensive list of all reports you can access.
- Instances**: Use the **Instances** tile to view the list of your scheduled reports and their status.
- Recycle Bin**: Use the **Documents** dropdown to switch between open documents.
- Favorites**: Use the **Folders** tile to access reports for which you have access. You can add frequently used reports to **Favorites** for quick access. *COB Analytics* and *FDS on Demand Reports* are defaulted for Finance users.
- Recent Documents**: **Recent Documents** contain tiles for reports that you recently ran.
- Recently Run**: **Recently Run** will contain tiles of scheduled reports that ran (similar to Instances).

Navigating Report Folders

1. Click the **Folders** tile.
2. Expand **Public Folders** and the **HR** folder. Click the desired report **Title** to run or Enter Values for parameters (if needed).

Report Viewer

- File**: Use the **Export** button to save your report to other formats, e.g., Excel, PDF, HTML..
- Query**: Use the **Query** button to change Prompt Values after running your report.
- Analyze**: Use the **Filter Bar** button to display and set filters values.
- Display**: **Display Settings** allow you to Freeze Header, Fold/Unfold Rows, and run in Presentation Mode (full screen).
- Reading**: **Show Main Panel** to view report properties. Toggle between **Reading** or **Design** (for Webi Developers) mode.
- Filter Summary**: **Drill Filters** are available when you activate the **Filter Bar** button.
- Navigation**: Use **Tabs** to navigate to documents in the report.
- Vanishing Toolbar**: Use the **Vanishing Toolbar** at the bottom of the page to navigate the report when in Reading mode.

For complete instructions on how to use the features and generate HR reports, access the [Human Resources Reporting Training Guide](#).