Copy of Finance Ad Hoc Reporting

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1. **Purpose** – This classroom instructor-led training course was created to help users learn how to use UDW+ for ad hoc financial reporting and analysis. Users will learn important business rules and processes in using financial data and will receive hands-on training in:
   - Creating basic analyses
   - Adding filters
   - Saving analyses and the catalog
   - Column properties
   - Writing formulas
   - Pivot table and graph views
   - Totals and prompts
   - Sharing analyses via XML code
   - Bins (custom groupings)

2. **Target Audience** – The intended audience for this page is advanced NYU financial reporting users who have access to UDW+ and are familiar with financial data.

3. **Training and Access** – There are two courses that may help with using the Finance Ad Hoc Reporting dashboard. Both courses are listed below and can be found in NYUiLearn:
   - **Beginner Ad Hoc Classroom Training (FIN 850: UDW+ Ad Hoc Reports Classroom Training):**
     - **Prerequisites:**
       1. FIN 800: UDW+ Dashboards Online Training in NYUiLearn as well as the FIN 801, 802, 803, or 804 quizzes. We recommend becoming familiar with the UDW+ Dashboards prior to attending Ad Hoc Reports Classroom Training.
       2. Chartfield Access. If you need assistance with completing the online form, please contact FinanceLink at 212-998-1111 or askfinancelink@nyu.edu.
   - **Intermediate Ad Hoc Classroom Training (FIN 860: UDW+ Ad Hoc Reports Intermediate Classroom Training)**

4. **Data Security** –

5. **User Notes** –

6. **Support** – If there is an issue that you would like to report or you have questions about DW+, please contact the Decision Support Group by email at askDSG@nyu.edu or call 212-998-2900 (extension 82900).

7. **Additional Resources** – Training is recommended for those who are new to UDW+. To schedule a one-on-one training session, contact the Decision Support Group at 212-998-2900 or email askdsg@nyu.edu. The NYU Business Glossary is a living document that contains commonly used NYU business terms for reference.