

Decision Support 101

Introduction to DaFIS Decision Support

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CLASS OBJECTIVES:

- Gain a basic understanding of the FIS reporting tool
- Learn how to navigate through the reports and screens
- Develop the ability to choose appropriate categories and reports
- Practice returning results in appropriate format

TOPICS COVERED:

- Decision Support System Overview
- Accessing Decision Support
- The Decision Support Home Page
- My Query Options
- Query Categories
- Query Basics and Navigation
- Decision Support Output Options
- Processing the Query
- Additional Functions in DS
- Appendix - Web Resources For DaFIS



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DECISION SUPPORT SYSTEM OVERVIEW

What is Decision Support (DS)?

DS is the Web-based reporting component of DaFIS. It provides you with the ability to report on the reference data and financial transactions generated within Transaction Processing (TP) or by any of the feeds to the General Ledger (GL).

How often is DS updated?

DaFIS DS is updated nightly, Sunday through Friday. Transactions can be seen in DS the morning after they are approved (except for Saturday, which becomes available on Monday morning).

When is DS available?

DS is available from 6 AM to 10 PM, Monday through Friday and 6 AM to 8 PM, Saturday . DS is generally not available on Sunday due to system maintenance.

Who uses Decision Support?

There are three types of DS users:

- **Normal Access Users** – these are users who also have access to Transaction Processing. These are the primary business users at the university, having day to day involvement with financial transactions and reporting. They generally have unrestricted access to system data.
- **DS Only Users** – these users have been granted access to Decision Support only, and are restricted to information within specified organizations and/or for specific accounts. These users need to report on activity in specific accounts, but are not involved in the actual financial transactions themselves. This access is granted, managed and revoked by Access Managers. DSOOnly Access is covered in detail in desk references available on our Web site, <http://dafis.ucdavis.edu/help/docs/index.cfm>.
- **Direct Access Users** – these are users who have been given permission to access the tables in Decision Support directly. They are skilled in writing SQL queries, and have a need for highly customized data that cannot be obtained through the standard queries available in DS. More information is available at <http://dafis.ucdavis.edu/userinfo/dsdirect.cfm>.

ACCESSING DECISION SUPPORT

Since DS is Web-based, you must have an appropriate browser on your computer. Information on supported browsers can be found at <http://dafis.ucdavis.edu/install/>. Once an appropriate browser has been selected, and you have been given access to DS, you can log into the system.

1. Type <https://dafisds.ucdavis.edu> in your browser's location bar, or click on the Decision Support link from the DaFIS home page <http://dafis.ucdavis.edu/>. You should then see the **Sign-In to Decision Support** screen.

Note

Logon ID is not case sensitive. Password is case sensitive.

2. Click on **Log In with Kerberos**. Log in using your UCD login ID and your Kerberos password in the fields provided.

THE DECISION SUPPORT HOME PAGE

The screenshot shows the DaFIS Decision Support home page. At the top left is the logo and text: "DaFIS Decision Support", "DaFIS Decision Support", "Good Morning Christian [Logout]", "Current Fiscal Period : March, 2008 is Open", and "Prior Fiscal Period : February, 2008 is Closed". At the top right is a "What's New?" link and a "Query Jump" field. The main content area is a menu with two columns of links. The left column includes: "My Saved Queries", "My Query List", "User Options", "Need a Query? - Start Here! ?", "Accounting Office Reports", "Accounts Payable", "Accounts Receivable", "Annual Financial Reports", "CAMS", "General Ledger", and "FIS Web Applications". The right column includes: "My Scheduled Queries", "Administer DSO Only User Access", "OCP Reports", "Purchasing", "Reference Queries", "Research Administration", "Travel & Entertainment", and "UCDMC". At the bottom, there is a "Need help with DaFIS Decision Support? Try our help page. Additional resources are available on the DaFIS web site." footer.

Use this feature to go directly to a query input screen. Just enter the query number and hit Enter on your keyboard.

This link takes you to a list of all the changes made to DS.

What's New?

Query Jump :

Displays the status of the current and past fiscal periods.

The upper section contains your My Query options.

The lower section contains a list of query categories.

Links to FIS Web Applications

Links to help pages

Need help with DaFIS Decision Support? Try our help page. Additional resources are available on the DaFIS web site.

Template: jds/menu.cfm (\$Revision: 1.9.2:8.2.9 \$Date: 2007/10/03 22:54:07 \$)
Page Generated At: 03-Apr-08 11:37 AM

DS Release 7.4.1

Note

Query Categories are determined by user access rights. Not all users may see all categories

MY QUERY OPTIONS

My Saved Queries

Items in this folder appear as soon as you save a query. This function allows you to save a query with a set of parameters and a customized name. Information on saving queries can be found on page 8.

My Query List

This folder contains links to queries. Most DS users have queries they run frequently. You can save links to these queries in a personal query list, making them accessible in one place.

User Options

On this page you can adjust a few settings that affect how Decision Support is presented to you. Unless noted otherwise, changes take effect immediately.

My Scheduled Queries

Items in this folder appear as soon as you schedule a query. This function allows you to edit, activate/inactivate and delete your scheduled queries. Information on scheduling queries can be found on page 9.

Administer DSOOnly User Access

This link appears if you are made an Access Manager for Decision Support. Access manager duties are delegated from a high level access manager, usually at the Dean or Vice Chancellor's level. (DSOnly Access is covered in detail in desk references at <http://dafis.ucdavis.edu/help/docs/index.cfm>.)

QUERY CATEGORIES

Reference Queries

These queries provide reference data from the Transaction Processing tables, as well as user workflow information. Using the Reference queries can assist you with:

- **Transaction Processing** – Run Reference Queries to provide you with a printed list of information you can only view in TP. For example, you can create your own Object Code “cheat-sheet” for creating **Direct Charges** in TP.
- **Decision Support** – Locate the information you need before you run your queries: organizations, objects, commodities, etc. In addition, there is a query to help you select the right query – **Query List (168)**.

General Ledger Queries

These queries present financial information in various levels of detail, from a one-line summary of account balances to a detailed listing of transactions.

Purchasing, CAMS and Accounts Payable Queries

Information related to purchases and payments is available from the Purchasing and Accounts Payable queries. The CAMS category offers lookups as well as queries used for inventory reporting.

Annual Financial Reports

This category allows you to view Annual Reports and Campus Financial Schedules.

QUERY BASICS AND NAVIGATION

Click this button to see the field requirements for running this report.

Use this checkbox to display your results in a separate browser window.

The legend indicates the meaning of symbols found on the input screen.

Text fields are the most common input. Those marked with a % allow wildcards. See the legend for the available wildcards.

Checkboxes used to indicate a Yes/No condition. The field title indicates what the "Yes" (checked) condition represents.

Dropdown lists allow you to select from a prescribed list of options.

Checkboxes used to include a set of criteria.

Radio buttons are used to select from a list of options. A default is always selected for you.

Process Query buttons appear at both the top and bottom of all input screens.

DaFIS Decision Support >> General Ledger >> Extramural Overdrafts

Required Field* % = Wildcards are Allowed: Use a % to match any number of characters Use a _ to match exactly 1 character

? = Field Description
= Click for a Picklist

Open In New Window? Process Query

Obtain Criteria from Prior Query
Set Current Criteria as Default
Add To My Query List
Save Query Criteria
Schedule This Query

Fiscal Year* Current
Fiscal Period* Current
Charts* 3 L H S
 P M N
Organization Code
Orgs to Show Subordinate Orgs This Org Only
Sub Fund Group Type
Sub Fund Group Type List
Fund Group
by Home Department first

Process Query

Need help with DaFIS Decision Support? Try our help page.
Additional resources are available on the DaFIS web site.

Other Navigation Options

- **List** allows you to specify more than one value as a parameter. For example, the **Transaction Listings (2)** allows you to use a list of accounts for your report. This gives you more versatility than querying for a single account, or for all accounts in a specified organization.
- **Picklist** opens a look up screen that allows you to search by name fragment to generate a picklist for the appropriate field.
- **Calendar** allows you to select a date from a calendar popup.

DECISION SUPPORT OUTPUT OPTIONS

At the bottom of each query screen is a radio button which allows you to select the format of the query results. Some of these options are not available on every DS query. The default for all queries is HTML format.

Browser/HTML

With this option, query results are displayed by your browser. Click on the blue text in your results to get more detail on that item. The results can be reviewed online or sent to a local printer. Depending upon the printer and operating system, the browser pages can be sized, formatted and arranged.

RTF

Rich Text Format (RTF) allows you to return selected DS queries to a word processing application. This gives greater flexibility in formatting reports. Page breaks are made at the end of each subtotal section, and headers appear on each page. The RTF output also includes the document number for a transaction, which is not always seen on the results that return to a browser.

Spreadsheet

DS output can be returned in the form of a comma delimited file that is accepted by your spreadsheet application. This option removes all formatting and totals; however, the data can be rearranged. Rows and columns can be manipulated, new formulas can be created, and the file can be saved for future use.

PROCESSING THE QUERY

Process Query runs the selected query. It is located on the top and bottom of the input screen. Click *only once* to run the query.

If the cursor is moved away from the button and an hourglass appears, then the query is running. The processing time required depends on how much data the query requested, and how many other requests are being processed at that time.

Note

If the query does not complete within ten minutes, the process stops and displays an error message.

Reports

The query results are referred to as **reports** and returns information based on the criteria entered in the query.

Note

If no results are found, modify the entered criteria and process the query again.

ADDITIONAL FUNCTIONS IN DS

Using Prior Query Parameters

Obtain Criteria from Prior Query pops up a window with the last 10 sets of parameters used for the query. Click on **Use These Parameters** below the desired list of values to fill your criteria fields. These fields may then be modified if necessary.

Setting Default Parameters

Set Current Criteria as Default saves the currently displayed values in the query form and becomes the default criteria each subsequent time this query is accessed. After clicking this button you must wait until the query form reloads. Only then will the defaults be saved.

Personal Query Lists

Add To My Query List adds the current query to a personalized list of queries. This allows you to maintain a list of the queries you use most frequently. The only thing saved is the link to the query input page; no parameters are saved. The button becomes **Remove From My Query List** once the query is added.

Saving and Sharing Queries

Save Query Criteria takes you to a page where you can create your own queries, based upon the standard queries but using a specific set of parameters. These saved queries can be given custom names, and can be shared with other users.

Step-by-step instructions for using all of the saved query functions can be found in **Guide 22 - Using the Query Parameter Save in Decision Support**, available at http://dafis.ucdavis.edu/help/docs/22_A_SaveQuery.pdf.

Scheduling Queries

Schedule This Query allows you to schedule a query to run and be sent via e-mail to a list of recipients. You should use a comma or semi-colon to separate multiple e-mail addresses in the **E-Mail Address** field. The reports can be scheduled to run daily, weekly, monthly or after ledgers close. Enter the desired report parameters on the **Edit Scheduled Query** screen. On some queries, *some* search criteria must be entered before the **Edit Scheduled Query** screen can be accessed. Once all desired data is entered click **Create Scheduled Query**.

The scheduled report is e-mailed early on the day it is scheduled. Recipient can follow the link at the bottom of the e-mail to stop receiving the scheduled query. You can maintain your scheduled queries at **My Scheduled Queries** (page 5).

APPENDIX - WEB RESOURCES FOR DAFIS DECISION SUPPORT

Below are some Web resources which you may find helpful when working with DaFIS. Check them out, and you may find a new resource that makes running Decision Support queries just a little bit easier!

- Looking for DS tutorials, class handouts or FAQ?
<https://dafisds.ucdavis.edu/DecisionSupport/help/>
- **Sample Decision Support Queries** can be found at
<https://dafisds.ucdavis.edu/ds/starthere.cfm>
- Why shouldn't I share my password?
<http://dafis.ucdavis.edu/userinfo/password/sharing.cfm>
- Want to practice exercises outside of the lab?
<http://dafis.ucdavis.edu/userinfo/practice.cfm>

