How To Use The Tools

Click the links below for simple instructions on some basic functionality

- Create a Basic Layout (ppt)
- Create a Report View, Schedule and Distribute (ppt)
- Add a Fiscal Year Filter (ppt)
- More

Definitions and Descriptions

- Cognos Delivered Reports & Self Service Packages
- Self Service Packages Data Dictionary
- ESRA Self Service Package Data Dictionary
- More

Self Service Divisional Templates

Click the links below for lists of divisional templates with instructions/examples on how to create/run

- Layouts You Can Run
- Layouts You Can Edit

Training

- FMS1100 Accessing Essential Financial Information

  This self-paced course covers basic use of the Portfolio and Cost Analyzer Reporting tools

  Take it online at Training.lbl.gov

- FMS1102 Intermediate Financial Reporting Series

  - Class Recordings & Slides

FMS Help & Knowledge Base (Open askUS ticket)

Give us your Feedback!
We've added to the self service environment!

- Summary
- Activities
- eSRA package