

From: [URFINANCIALSUSERS](#) on behalf of [UR Financials](#)
To: URFINANCIALSUSERS@LISTS.ROCHESTER.EDU
Subject: UR Financials Newsletter vol 12.0
Date: Friday, May 08, 2015 9:35:33 AM
Attachments: [image002.png](#)
[image004.png](#)



This UR Financials Newsletter Contains recent system updates and changes within the UR Financial (Workday) system. Previous volumes are located on the UR Financials web site [Newsletter](#) page

Volume 12.0 as of May 8, 2015.

[Announcements](#)
[New Reports](#)
[Updated Reports](#)
[Deprecated Reports](#)
[Tips and Tricks](#)

Item	Impacted Users	Topics of Interest
		Announcements:
	All Users	<ul style="list-style-type: none"> Thursday, May 7th - April monthly financial reports are available.

Item	Impacted Users	Topics of Interest	Effective Date	Support Contact
		New Reports:		
1.0		<ul style="list-style-type: none"> None at this time 		

Item	Impacted Users	Topics of Interest	Effective Date	Support Contact									
		Updated Reports:											
2.0		<table border="1"> <thead> <tr> <th>REPORT NAME</th> <th>REPORT DESCRIPTION</th> <th>CHANGES</th> </tr> </thead> <tbody> <tr> <td>FAO Summary of Funds URF0964</td> <td>Current month and FYTD actual Additions and Deductions, compared to full-year budgets, listed by FAO. Excludes Grants and Capital Project PRs (FRS 760xxx - 764xxx accounts).</td> <td>FAO Hierarchy prompts added to report criteria for filtering.</td> </tr> <tr> <td></td> <td></td> <td> <ul style="list-style-type: none"> UR Debt Service Hierarchy <input type="text" value="search"/> UR Gift Hierarchy <input type="text" value="search"/> UR Loan Program Hierarchy <input type="text" value="search"/> UR Operating Program Hierarchy <input type="text" value="search"/> UR Project Hierarchy <input type="text" value="search"/> </td> </tr> </tbody> </table>	REPORT NAME	REPORT DESCRIPTION	CHANGES	FAO Summary of Funds URF0964	Current month and FYTD actual Additions and Deductions, compared to full-year budgets, listed by FAO. Excludes Grants and Capital Project PRs (FRS 760xxx - 764xxx accounts).	FAO Hierarchy prompts added to report criteria for filtering.			<ul style="list-style-type: none"> UR Debt Service Hierarchy <input type="text" value="search"/> UR Gift Hierarchy <input type="text" value="search"/> UR Loan Program Hierarchy <input type="text" value="search"/> UR Operating Program Hierarchy <input type="text" value="search"/> UR Project Hierarchy <input type="text" value="search"/> 	Effective today	
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3.0	Company Level Users												
		Deprecated Reports:											
		<ul style="list-style-type: none"> None at this time 											

Item	Impacted Users	Topics of Interest
		Tips and Tricks
4.0	All Report Users	<p>How to Manage Report Filters</p> <p>Using Report Filters is a simple way to save specific report criteria to use at a later time. This is helpful for reports run on a regular basis. It is also necessary for Cost Center Financial Analysts to set report filters prior to Creating Report Groups. Filters are easy to create and therefore may become laborious to use, if not managed.</p> <p>Create Report Filters:</p> <ol style="list-style-type: none"> Launch UR Financials and search for / launch any report Complete the required and any optional report prompts based on your reporting needs Scroll to the bottom of the report criteria page and click once in the <i>Untitled Filter</i> field Type in a Filter name reflective of the criteria set for this report. For example; "CC11003 April 2015" Click Save <div style="border: 1px solid gray; padding: 5px; width: fit-content;"> <p>Untitled Filter</p> <p>Manage Filters <input type="button" value="Save"/></p> <p>0 Saved Filters</p> </div> <p>Using Report Filters:</p> <ol style="list-style-type: none"> Launch UR Financials and search for / launch a report with a saved filter Scroll to bottom of report criteria page and select Saved Filters. Tip: the number before Saved Filters indicates the amount of filters saved in the report Select the filter name that contains the report criteria needed

4. Click **OK** to run report

Manage Report Filters:

1. Launch UR Financials and search for / launch the report that holds the filters to manage, or change
Note: each report holds only the filters associated with that report
2. Scroll to the bottom of the report criteria page and click **Manage Filters**
3. This will open the **Manage My Saved Filters** in a separate tab in your browser

Manage My Saved Filters		
2 Items		
Report	Saved Filter	
FAO Activity Summary by Month (NCL) LRF0392	CC123456 - Test 1	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
FAO Activity Summary by Month (NCL) LRF0392	CC7891011 - Test 2	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

4. In the **Manage My Saved Filters tab** is a listing of all saved filters for this report, choose edit or delete button to modify or remove the filter
 - a. Click **Edit**, to open the report filter criteria page. Here you can reset any filter criteria. Including the filter name located at the top of the page
 - i. Click **OK** to save any changes
 - ii. A criteria summary page appears. After verifying the changes, select **Done** to close page
 - b. Click **Delete**, to open the **Delete Saved Filter** page. This allows you to confirm the removal of this report filter
 - i. Select the **Confirm** check box and click on **OK** to save,
 - ii. Select **Done** to close page
5. Both options to Edit/Delete will return to the **Manage My Saved Filters** page. On this page other filters can be managed, or close tab when finished

To unsubscribe from the URFINANCIALSUSERS list, click the following link:

<https://lists.rochester.edu/scripts/wa.exe?>

[TICKET=NzM1NzU2IGNpbmR5LmZyb250ZXJyZUBST0NIRVNURVluRURVIEVSRkIQOUSDSUFMU1VTRVJTIBDT72O5n12%2F&c=SIGNOFF](https://lists.rochester.edu/scripts/wa.exe?TICKET=NzM1NzU2IGNpbmR5LmZyb250ZXJyZUBST0NIRVNURVluRURVIEVSRkIQOUSDSUFMU1VTRVJTIBDT72O5n12%2F&c=SIGNOFF)