

From: [URFINANCIALUSERS](#) on behalf of [UR Financials](#)
To: URFINANCIALUSERS@LISTS.ROCHESTER.EDU
Subject: UR Financials Newsletter vol 30.0
Date: Friday, September 11, 2015 9:12:43 AM
Attachments: [image002.vml](#)
[image004.png](#)
[image005.png](#)
[image007.png](#)



This UR Financials Newsletter Contains recent system updates and changes within the UR Financial (Workday) system. [Announcements](#)
 Previous volumes are located on the UR Financials web site [Newsletter](#) page in printable (pdf) form. [New Reports](#)
[Updated Reports](#)
[Deprecated Reports](#)
[Tips and Tricks](#)

Volume 30.0 as of September 11 2015.

Item	Impacted Users	Topics of Interest
		Announcements:
	All Users	<ul style="list-style-type: none"> Workday will be conducting an upgrade to version 25 (WD 25) in September. Please note, the UR Financials system will <u>not</u> be available from Saturday, September 12th - to 8:00 AM on Monday, September 14th. Refer to the Tips and Tricks section to review how to filter report results after this upgrade. If you experience an issue not addressed in the self-help materials or after consultation with a project champion, please call your Help Desk for assistance - IT Help Desk (585) 275-2000, or Medical Center (ISD) Help Desk (585) 275-3200. This month's User Group meeting will be on September 16th and will focus on Workday 25 upgrade along with an updated Training and Support approach. Sign up today! Non Company Level Reporting classes are being redesigned with specialized classes by report type. The first class offered on October 5th will focus on Operating Program and Gift reporting. Sign up if you are a new, or existing user.

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

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

Item	Tips and Tricks			
4.0		<ul style="list-style-type: none"> Workday 25 User Interface Changes 		
		<p>Filtering report results will change on September 14th by using any one of the following options:</p> <ol style="list-style-type: none"> Select the column title to invoke the Memo Window, then set criteria (Memo Window image below) Select the Filter icon to invoke the Filter Window to choose Add, then select column, then set criteria <p>Clicking on the filter icon allows you to filter data under any column header by completing several steps.</p> <p>A faster way to filter is by selecting the column header on which you would like to filter by completing the Memo window criteria. Using the Memo window users can sort data in ascending or descending order, set filter to return results on a set value(s), or carve out results for that column.</p> <p>This feature now allows you to filter on multiple columns.</p> <p>Filter functionality is not available in all of your reports, but it is available in most detail report types that return results greater than one page.</p> <p><i>Filter image:</i></p>		

Filtering



- Focus on the data you need to see
- Able to filter under any column heading
 - Use filter icon or select column title
 - Filters on multiple columns
- Available in many reports

Period	FAO	Ledger Account	Special or Revision Category	Accounting Date	Transaction Amount	Line Memo	Header Memo	Journal Source	Journal	Supplier / Customer	External PO Number	Operation Transaction
July	0P620921 Dean's GR Optics	42000 Gifts	Gifts (RC10250)	07/01/2015	(100.00)	0001337577 (Shuman, Arnold D.) Unrestricted (AD6012) Deans Fund for Institute of Optics (0006303673	OASIS	AJED00427434 021 School of Arts and Sciences - 07/01/2015 - 0006303673			
July	0P620905 Dean's GR Chem Eng	42000 Gifts	Gifts (RC10250)	07/06/2015	(5.00)	0001427872 (Hu, Jianfeng) Unrestricted (A27960) Deans Fund for Chemical Engineering (0006349753	OASIS	AJED00430271 021 School of Arts and Sciences - 07/06/2015 - 0006349753			

Column Title option #1: **NOTE:** filters can be applied on multiple columns in Workday 25

- Select any column title to launch the (filter) Memo window

Memo Window image:


Memo

↑ Sort Ascending
↓ Sort Descending

Filter Condition * contains

Value * |

OK Cancel

- Select sort column as **Ascending**, or **Descending** order, if needed
- Set **Filter Condition** for the column
 - Ensure the Filter condition is appropriate for you filter (contains/does not contain, is/is not equal to)
 - Select value(s) to filter on within the **Value** field. Either type, or use the prompt icon  to select the value(s). Selecting the prompt icon will show all options available for that column
- Click **OK**

To Turn Filters off:

- Select the filter icon within the column header and choose **Remove Filter**

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