

From: [URFINANCIALSUSERS](#) on behalf of [UR Financials](#)
 To: [URFINANCIALSUSERS@LISTS.ROCHESTER.EDU](#)
 Subject: UR Financials Newsletter vol 56
 Date: Monday, October 17, 2016 11:15:25 AM
 Attachments: [imaas004.png](#)
[imaas005.png](#)
[imaas006.png](#)
[imaas013.png](#)



Volume 56 as of October 17, 2016

Announcements

- The [Spend and Revenue Category Definitions](#) workbook has been updated on the [Tools](#) page of our website. This definition list is a living document and requires collaboration to maintain. This spreadsheet contains 3 tabs; Request to Add/Change, View Spend Categories and View Revenue Categories.
- User Group Meeting for October has been cancelled. Look for us in [November](#).

New Reports

New FAO Available Balance Summary by UR Loan Program Report

A new **Company Level** report has been created for those that require available balances on Loan Financial Activity Objects (FAOs), entitled *FAO Available Balance Summary by UR Loan Program URF1017*. Report output is based on user security.

Updated Reports

Updates made to the Out of Award Line Period Activity Summary Reports

Cost Sharing (University's share of the cost of research) has been **removed** from the following reports:

- Out of Award Line Period Activity Summary (NCL) URF0842*
- Out of Award Line Period Activity Summary URF0404*
- Award Line Summary of Funds (NCL) URF0983*
- Award Line Summary of Funds URF0994*

Structural changes have been implemented for the *Out of Award Line Period Activity Summary URF0404* and *Out of Award Line Period Activity Summary (NCL) URF0842* reports. They include the following changes:

- Reordered prompts
- Principal Investigator column has been added
- Award line date columns (Grant From/Grant To) added
- Award portfolio Specialist information removed
- Shortened the Cost Center of Primary Award Line column to just show Cost Center code

Figure 1: Updated Out of Award Line Period Activity Summary (NCL) URF0842 – report input

Figure 2: Updated Out of Award Line Period Activity Summary (NCL) URF0842 – report output (redacted)

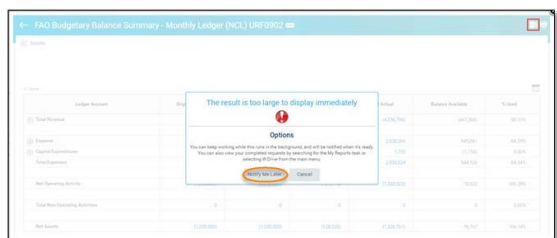
Cost Center of Primary Award Line	Award	Grant	Principal Investigator	Grant From	Grant To	Award Line Total
001104000	AWARD0001 COLLABORATIVE RESEARCH PROGRAMS LONG TERM GLOBAL IN 0110	0010701 005 00007	Smith, Allen	08/01/2012	07/31/2014	\$ 0,000.00
001104000	AWARD0002 COLLABORATIVE RESEARCH PROGRAMS LONG TERM GLOBAL IN 0110	0010701 005 00007	Smith, Allen	08/01/2012	07/31/2014	\$ 0,000.00
001104000	AWARD0003 COLLABORATIVE RESEARCH PROGRAMS LONG TERM GLOBAL IN 0110	0010701 005 00007	Smith, Allen	08/01/2012	07/31/2014	\$ 0,000.00
Total						\$ 0,000.00

Tips and Tricks

How to view a report results too large to display

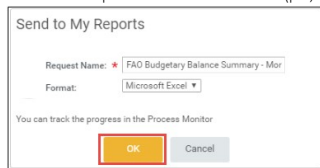
When running a summary report, there may be occasions when the report results are too large to display immediately. There are two options for users; cancel the report, or be notified later.

If there is no need to cancel the report to refine report criteria further, then the Notify Me Later option can be chosen. The choice will automatically appear in a pop up window within the UR Financials system when report results take longer than normal to display on screen or when exporting to Excel.

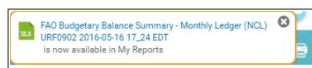


Steps to follow when Notify Me Later is chosen:

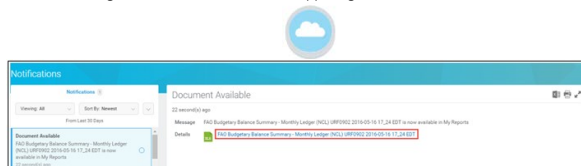
1. Select **OK** within the *Send to My Reports* window appears
 - a. This sets the report name and result format (pdf, excel) and saves to a separate file.



2. When the report has finished running and saved to a separate file, a notification will appear in the upper right of the user's UR Financials screen. Within this notification the report can be launched by selecting the report name link OR



3. The report can be retrieved within the *W:Drive*, or *Notifications* screen within UR Financials. Both of these screen can be accessed through the View Profile icon in the upper right of the screen.



More tips can be found on the [UR Financials website](#). For questions, contact [UR Financials](#) or the University IT Helpdesk at 275-2000/URMC Help Desk at 275-3200.

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 in printable (pdf) form.

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