

From: [URFINANCIALSUSERS](#) on behalf of [UR Financials](#)
 To: [URFINANCIALSUSERS@LISTS.ROCHESTER.EDU](#)
 Subject: UR Financials Newsletter vol 59
 Date: Monday, January 16, 2017 10:06:03 AM
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Volume 59 as of January 16, 2016

Announcements

News

- UR Financials (Workday) next upgrade will be on March 13th. More details will be shared in upcoming Newsletters, website and User Group meetings as this date approaches.

Calendar

- Remember the next [User Group Meeting](#) is scheduled for January 21, 2017.
- Additional UR Financials Report training dates have been added to the [Calendar](#). Register in MyPath, once [prerequisites](#) have been satisfied.

| | | |
|--------------------|------------------------|---------------------------|
| New Reports | Updated Reports | Deprecated Reports |
| None at this time | None at this time | None at this time |

Tips and Tricks

The UR Financials View By feature and How It's Used

When running summary reports in UR Financials, the **View By** feature will allow users to view total amounts in several different ways - by company, cost center, FAO, etc.

To further explore this, follow these steps:

- Type in a summary report such as the FAO Activity Summary by Months (NCL) URF0392 report in the UR Financials **Search** field
- Run the report and view the amounts in the month and Total columns
- Move your mouse over the amount (i.e. \$594 amount below) until you see the teeny tiny triangle

| FAO | Ledger Account | Spend or Revenue Category | FY2016 | |
|---------------------|----------------|---------------------------|---------|-------|
| | | | January | Total |
| OP217024 Finance | 60000:Supplies | Supplies Office (SC61000) | \$594 | \$594 |
| OP217024 Finance | 60000:Supplies | Supplies Other (SC61200) | \$385 | \$385 |

- Click on the upside down triangle to see a pop up window appear listing the **View By** options and choose an option (i.e. Company)

| FAO | Ledger Account | Spend or Revenue Category | January | Total |
|---------------------|----------------|---------------------------|---------|-------|
| Finance | | | | |
| OP217024 Finance | 60000:Supplies | Supplies Office (SC61000) | \$594 | \$594 |
| OP217024 Finance | 60000:Supplies | Supplies Other (SC61200) | \$385 | \$385 |

- Based on what you selected within the options, a separate pop up window will appear with the related details (i.e. company of where the \$594 amount belongs to)

Criteria View by: Company and then by: Select a Field... Refresh

2 items

| Company | Total |
|----------------------------|-------|
| 010 Central Administration | \$594 |
| Total | \$594 |

6. An additional view by option can be selected for another criteria to view by, if desired.

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 [here](#), page in printable (pdf) form.

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