Announcements

- 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.

- 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.

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:

1. Type in a summary report such as the FAO Activity Summary by Months (NCL) URF0392 report in the UR Financials Search field.
2. Run the report and view the amounts in the month and Total columns.
3. Move your mouse over the amount (i.e. $594 amount below) until you see the teeny tiny triangle.
4. 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).
5. 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).
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.

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