

From: [URFINANCIALSUSERS](#) on behalf of [UR Financials](#)
 To: URFINANCIALSUSERS@LISTS.ROCHESTER.EDU
 Subject: UR Financials Newsletter vol 6.0
 Date: Friday, March 27, 2015 1:49:00 PM
 Attachments: [image001.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 website [Newsletter](#) page

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

Volume 6.0 as of March 27, 2015.

Item	Impacted Users	Topics of Interest
		Announcements:
	All Users	<ul style="list-style-type: none"> The Integrations Schedule has been updated For April. For a complete picture of all Integrations use these Integration Schedule and Workday Process Monitor (historical) together.
	Grant Users	<ul style="list-style-type: none"> Grants Management Reporting Demonstration & Discussion held today
	All Users	<ul style="list-style-type: none"> April dates have been added to the interactive, hands-on UR Financials Reporting Workshops. Review the presentation and sign up today.
	All Users	<ul style="list-style-type: none"> If you received an error when exporting to excel, or received an error expanding revenue section on your monthly ledger report (URF0902, URF0945, URF0957, URF0958). This has been resolved and is working correctly.
	All Users	<ul style="list-style-type: none"> Quick Reference Cards have been recently been created and updated. Download your new copy here. <ul style="list-style-type: none"> - .Manager Financial Report: Quick Reference Card – <i>new item</i> - .FAO Activity Summary by Months Report: Quick Reference Card – <i>updated</i> <p>NOTE: Check your saved report criteria Filters for accuracy. Several reports have recently changed and may have impacted report filters</p>

Item	Impacted Users	Topics of Interest	Effective Date	Support Contact						
		New Reports:								
1.0	Company Level	<table border="1"> <thead> <tr> <th>REPORT NAME</th> <th>REPORT DESCRIPTION</th> <th>PURPOSE</th> </tr> </thead> <tbody> <tr> <td>View FAO by Cost Center (NCL) URF0970</td> <td>This report will allow <i>Cost Center Financial Analyst</i> users to view a list of non-Grant FAOs for their cost center</td> <td>To see a total listing of all non-Grant FAOs by cost center</td> </tr> </tbody> </table>	REPORT NAME	REPORT DESCRIPTION	PURPOSE	View FAO by Cost Center (NCL) URF0970	This report will allow <i>Cost Center Financial Analyst</i> users to view a list of non-Grant FAOs for their cost center	To see a total listing of all non-Grant FAOs by cost center	Effective today	Support
REPORT NAME	REPORT DESCRIPTION	PURPOSE								
View FAO by Cost Center (NCL) URF0970	This report will allow <i>Cost Center Financial Analyst</i> users to view a list of non-Grant FAOs for their cost center	To see a total listing of all non-Grant FAOs by cost center								

Item	Impacted Users	Topics of Interest	Effective Date	Support Contact
2.0		Updated Reports: <ul style="list-style-type: none"> None at this time 	Effective today	Support
3.0		Deprecated Reports: <ul style="list-style-type: none"> Payment Transaction report has been removed please use Find Payment Report in its place 		

Item	Tips and Tricks
4.0	Reminder: To quickly retrieve the your Manager Financial report create it in your favorites (see below). It will not appear in Dashboard.

Adding a Worklet (Favorites, or Grant Management Dashboard) window to your Home Screen

1. Log into Workday
2. Click the **COG** icon to the right of your home page
3. Click the + (Plus) sign in the Optional Worklets area, then type ***Favorites*** in the Worklet column and press **Enter** on your keyboard
4. Select **Ok**, then **Done**

Adding Reports to your Favorite window

1. Click the **COG** icon within the ***Favorites*** window and chose Manage Favorites
2. Type in the Workday report name you would like to add to your ***Favorites*** in either the *Favorite Tasks/Reports*, or *Favorite Custom Reports prompt* field. It will be in one or the other. If one of the fields does not accept your report name try the other field.
3. Select **Enter** on your keyboard when done.
Tip: Use the [Report Crosswalk](#) to help find your *FRS* report in Workday terms
4. Select **OK** in the Manage Favorites screen, then select **Done**