

UDW+ TIPS & TRICKS

September 2013, Issue #7

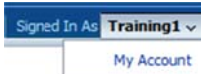
This friendly email newsletter provides all UDW+ users with helpful UDW+ Tips and Tricks for more efficient and easy system use.

SET A DASHBOARD AS A DEFAULT HOME PAGE

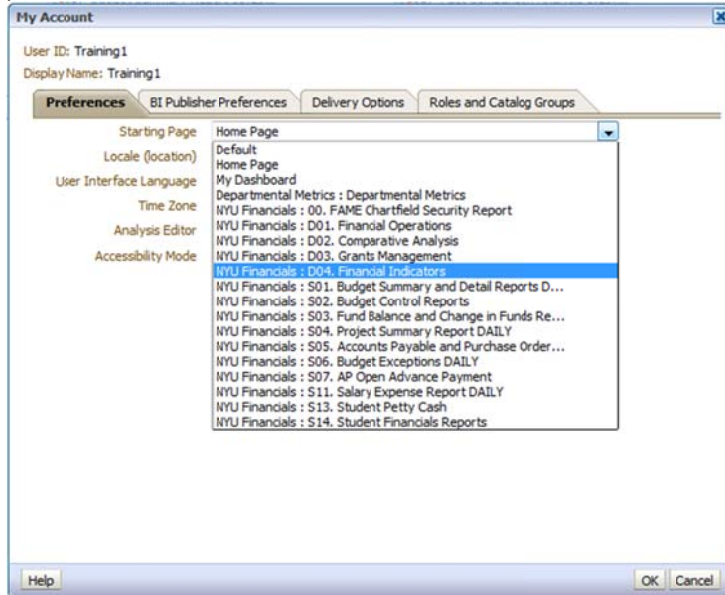
Did you know that you can set a specific Dashboard to be your default Home Page when you login to UDW+?

If there is a dashboard or report that you access most frequently or exclusively, you can set it to automatically display when you login to UDW+. Follow the simple instructions below:

1. Login to **UDW+**.
2. Navigate to your **Net ID** located in the upper right hand corner.
3. Click on the down arrow and choose "**My Account**".



4. On the **Preferences** tab, click on the dropdown for **Starting Page**.
5. **Choose** your preferred default dashboard or report from the available options.



6. Click **OK**.

Upon your next UDW+ login, your newly set Home Page will be set!

BUDGET CONTROL RULES

As you are working through **Year-End Close**, we remind you to use the reports available within the **UDW+ Financial Operations Dashboards** whose default view is determined by the budget-checking rules for the selected grouping of funds (for example, the roll-up to Project view is displayed as the default for

LOOK OUT!!!

We have new and exciting improvements coming to UDW+ Dashboards and Reports! Check your email inbox for the upcoming **September issue of the UDW+ Enhancements Newsletter** which will highlight some of the updates and changes that will be available based on your requests.

FINANCIAL BRIO COUNTDOWN



As a kind reminder, **all financial reporting will transition from Brio to UDW+ on October 31st, 2013**. Brio will no longer be accessible for **Financial Standard Reports** or **Financial Ad Hoc Reporting** after **October 31st**.

Please help us spread the word to your fellow financial reporting colleagues who may not be aware of this transition.

If you have any unmet financial reporting needs in UDW+, please contact [Addis Crooks-Jones](#).

Management Designated funds as they are budget-checked at the Project level).

RETURN BUTTON

If you drill to a report that navigates you away from a dashboard page, you should use the **Return** button to get back to the previous screen.

The **Return** button [Return](#) is always located at the lower left hand corner of the newly opened drill report (this may require scrolling).



University Data Warehouse Plus

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