

# UDW+ E-NEWSLETTER

January 2015, Issue #12

This e-newsletter provides the UDW+ community with tips, tricks and general UDW+ announcements. New to the UDW+ Reporting Community? Visit the [newsletter archive](#) to access prior issues.

## NEW UDW+ E-LEARNING COURSES AVAILABLE IN **NYU**iLearn

Two new [UDW+ iLearn](#) courses have been added:

1. **FIN 810: UDW+ Quick Review of Functionality** is a short online tutorial that goes through the basics of UDW+ navigation and functionality. This tutorial is a supplement to FIN 800: UDW+ Dashboards Online Training.
2. **FIN 851: UDW+ Ad Hoc Reports Training Online Refresher** contains a series of short online videos that serve as a refresher for those individuals that have completed FIN 850: UDW+ Ad Hoc Reports Classroom Training. It is an additional aid to review the concepts taught in class. Completion of this course is not sufficient to obtain access to the ad hoc environment. An individual must also complete **FIN 850: UDW+ Ad Hoc Reports Classroom Training** in order to obtain ad hoc environment access.

## VIRTUAL WORKSHOP ON COMMONLY CREATED UDW+ AD HOC REPORTS



Starting in February, the Decision Support Group will hold virtual workshops on the creation of commonly used financial UDW+ ad hoc reports. These online workshops can be joined from the convenience of your office. Once available, you can register for the sessions through [iLearn](#). Participants must have UDW+ ad hoc reporting access. Below are some reports that will be created during these workshops:

- **Budget Summary:** YTD Budget, Actuals, Encumbrance, Exception, Balance by Chartfield for Revenue, Expenses, and Transfers
- **Budget Detail:** Actuals by Jrnl ID, Jrnl Date, Vendor by Chartfield
- **Budget Detail\_PO Detail:** Encumbrance, Pending, Actuals and PO Detail by PO
- **AP Purchase Order:** Actuals Paid, Posted, and Open Balance Amount by PO
- **AP Payment:** Voucher Amount Paid and Jrnl Detail by Chartfield
- **Year Over Year:** Prior YTD Actuals vs. Current YTD Actuals and their \$ Variance
- **Fund Balance:** Funds 20-22 and 41-46 Opening Balance, Revenue, Expense, and Ending Balance for current FY.

Submit [feedback or suggestion](#) for future UDW+ virtual workshops.

## DID YOU KNOW? COSTING ALLOCATIONS CAN BE SET-UP BEYOND THE CURRENT FY

In the legacy HRIS system, regardless of the end date of a Grant, you could only have allocated costing until August 31st of the current fiscal year. In **PeopleSync**, you are able to set-up your **costing allocation into the future, beyond the current fiscal year** (requires that chartfields are set-up in FAME). Once the costing allocations are in PeopleSync, they will be visible in UDW+ for additional reporting and analysis.

## UDW+ AD HOC REPORTING FORUM



Plans are underway for the next UDW+ Ad Hoc Reporting Forum! This year's forum promises to be more hands-on, with a greater focus on collaborating with other members of the UDW+ community to create custom UDW+ reports. Stay tuned for details in the coming weeks!

## UDW+ STUDENT INTEGRATION UPDATE

The goal of UDW+ Student Integration project is to provide a comprehensive source of data about students and instructional activity that is accurate, documented, user-friendly and integrated with financial and human resources data.

Until now, Student data was just available in the **Departmental Metrics Dashboard**, which provides deans and department chairs with summary analytics describing the students in their programs, enrollment in their courses, and doctoral time to degree.

We are excited to announce that we have begun to expand the availability of student data via a newly created **UDW+ Student Dashboard**. Currently in the initial phase of the project, we have engaged a "Core" group of individuals from the IR and Registrar offices across all campuses, as well as a few individuals from schools. In February, we will engage a larger group of the student reporting community through the "Beta" program.

We are working directly with each school and division to plan the larger UDW+ Student roll-out. Please stay tuned for additional information.

## UDW+ HR SUPER USER KICK-OFF

If you are a key user of Human Resources reports and data, we are excited to tell you about the UDW+ HR Reporting and Analytics project, as well as the UDW+ HR Administration Dashboard and HR ad hoc reporting that are now available in UDW+. "Super Users" of HR data (including FO's, HRO's, HR Security Partners, UHR, and select individuals from the Budget Office and IR) should have received an invitation to the UDW+ HR Super User Kick-off (scheduled for **January 28th** from 9:30am-11:00am) in which we will:

- Tell you about the UDW+ Program and the HR Reporting and Analytics Project
- Show you a sneak peak of the UDW+ HR Administration Dashboard
- Review the phased UDW+ HR rollout approach and timeline
- Provide UDW+ HR training, access and support information
- Review the access provisioning process by which HR Security Partners will grant UDW+ HR data access to individuals within their respective units.



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