



UNIVERSITY OF ILLINOIS

AT URBANA-CHAMPAIGN



2015 BUSINESS LEADERSHIP CONFERENCE

Let's Explore the New U of I Financial Report Distribution Tool

A Shared Vision

Presenters

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Objectives

- Understand the functionality of the U of I Financial Report Distribution tool
- Determine if this tool meets the needs of your department

Agenda

- Explanation of dashboard
- Demonstration of dashboard
 - All Funds tab
 - Grants tab
- Explanation of RVM
- Demonstration of RVM

U of I Financial Report Distribution Tool

- Access to Financial Information
- Easy, Efficient Report Distribution
- Online
- Interactive
- Intuitive
- Fast
- Convenient
- Timely

Background

- Multiple Year Dream
- Collaborative Effort
 - AITS
 - OBFS
 - University Accounting
 - Grants & Contracts-UIUC & UIC
 - Business Information Systems

Intended Audience

- Business Managers
- Financial Officers
- Principal Investigators
- Business Office staff
- Anyone with a need for financial information

Tailored to individual users needs

- Only see what you want to see
- Data viewed is driven by Report View Module
 - RVM – a companion application
 - Units delegate viewing authority or can request someone to do it centrally

Improves Report Distribution

- Current Financial Report distribution process
- New process
- Meets after hours data and report access needs

What is included?

- Dashboard
 - All Funds & Grants tabs
 - Drill to transaction level
- Standard Financial Reports

Demonstration

- All Funds Tab
- Grant Tab
- [Dashboard](#)

Report View Module

- Viewer
 - Can view information in MyFi and RVM
- Assigner
 - Can view information in MyFi and RVM
 - Can assign roles in RVM
 - Equal permissions or below

RVM Roles

Report Viewer/Assigner

View information at any level of the organization hierarchy

- Will see all CFOPs that are within the organization hierarchy
- Will see all grants where the responsible organization on the grant is within the organization hierarchy

Project Report Viewer/Assigner

View information by CFOPs

- Principal Investigator needs to view their ICR and gift funds. They would have the role of project report viewer/assigner for each ICR and Gift CFOP

RVM Roles

Grant Report Viewer/Assigner

View information for specific grants, user will see all funds associated with those grants on the grants tab

Fund Report Viewer/Assigner

View information for specific funds within a grant

- To give permission to Co-PIs
- To give permission to grant funds where the organization on the grant is not within the users permissions

Demonstration

- Grants View
- Funds View
- Orgs and CFOPs View
- Search
- My Profile

Unit Pilot

School of Earth, Society, and Environment

- Current financial statement process
- SESE's involvement in the pilot
- Plan for rollout to SESE users
- Use from a business administrator role
- What it is not designed to do – at this time
- Future enhancements from a business view

Production Rollout

- Planned for Spring 2015
- Phased rollout
- Early adopters

Contact OBFS UAFR Dashboard

– obfsuafrdashboard@uillinois.edu

QUESTIONS

Thank You!