Financial Management System

Release 13 - Enhancements and Changes

September 10, 2018
## Contents

**Changes for department users** ........................................................................................................... 3  
  Journal Excel Spreadsheet Entry – New ................................................................................................. 3  
  Bookmark ............................................................................................................................................. 3  
  Navigation ........................................................................................................................................... 3  
  Home Page .......................................................................................................................................... 4  
  Manage Columns ................................................................................................................................. 4  

**Financial Management System – Changes to Reports** ...................................................................... 6  
  Financial Reporting Center – Search ..................................................................................................... 6  
  Reports and Analytics .......................................................................................................................... 6  

**Changes to Projects** ......................................................................................................................... 9  

**Expense Management** ..................................................................................................................... 10  
  Expense Location ................................................................................................................................. 10  
  Expense Reports Status ....................................................................................................................... 11  

**Sponsored Projects** .......................................................................................................................... 12  
  Manage Awards ................................................................................................................................... 12  
  Reports and Analytics .......................................................................................................................... 12
Changes for department users

Journal Excel Spreadsheet Entry – New

With Release 13, there are two minor changes for creating a journal using a spreadsheet. First, the Group ID field will populate after you submit the journal, not before, as it did prior to the upgrade. Second, the Category field is blank. You must select a category that starts with RU.

Bookmark

The URL will be changing in Release 13 from:

https://ecbg.fs.us2.oraclecloud.com to

https://ecbg.fa.us2.oraclecloud.com

Any bookmarks that you have created in your web browser will need to be recreated including URLs saved for reports and queries. Your saved bookmarks will eventually not function if you do not update your bookmarks.

Navigation

The Home page in the Financial Management System is your starting point for navigating to forms, setting favorites, and responding to notifications. The home page navigator menu is now located on the left hand side on the Home page.
Home Page

The Home page has a different look. The tile size has been enlarged and the colors are brighter.

Manage Columns

Manage Columns is used to hide, display or rearrange the order of columns in a search. In the Search Results toolbar, under View>Columns, Manage Columns is now located at the bottom of the drop down list.
### Search

#### Search Results

- **Actions**
  - **View**
  - **Format**
  - **Detach**
  - **Wrap**
  - **Create Mass Adjustment**

- **About This Record**
  - **Columns**
  - **Detach**
  - **Sort**
  - **Reorder Columns...**
  - **Query By Example**

- **Columns**
  - Raw Cost Rate
  - Burden Cost Rate
  - Transfer Price Amount in Receiver Ledger Currency
  - Transfer Price Amount in Provider Ledger Currency
  - Transfer Price Amount in Project Currency
  - Transfer Price Amount in Transaction Currency
  - Net Zero Item
  - Converted
  - Creation Date
  - Last Updated By
  - Last Updated Date
  - Contract Name
  - Contract Number
  - Errors Exist
  - Supplier Name
  - Comment
  - Supplier Invoice Number
  - Accounting Period
  - **Manage Columns...**
Financial Management System – Changes to Reports

Listed below are some minor changes to the Financial Reporting Center and Reports and Analytics in the financial management system.

Financial Reporting Center – Search

The magnifying glass on the right hand side, which was used to search for reports, is no longer available.

Instead search for your reports by entering information in the section “Enter Search Terms”.

Reports and Analytics

The Reports and Analytics tile will automatically open to the list of your favorite reports.

The navigation for “My Folders” and “Shared Folders” is now hidden to give more viewing area on screen.
Click the “Clear Filters” link if you want to browse through the “My Folders” and “Shared Folders”. When you browse through the folders, scroll in order to find the folder or report you need.

Use the Favorites feature to save your reports or queries as favorites and quickly display the reports and queries you use most often. Click the star to make a report or query a favorite.
You will now see the report or query in your favorite’s lists upon opening the Reports and Analytics tile.
Changes to Projects

In the projects module, the Transfer and Split and Transfer features now include a Contract Number and Funding Source fields.

For Sponsored projects, these fields are required and will automatically populate after you select a Sponsored project.

For Non Sponsored projects, these fields will be greyed out.
When completing an expense report, the location must be searched and then selected from the Search results rather than typing the location in directly. Choose the City, County, State and click OK.
Expense Reports Status

When expense reports are submitted for approval, the report status should change from In Progress to In Approval. Currently, the reports are remaining In Progress. The status below the RBU number will indicate the status of the expense report.
Sponsored Projects

Listed below are changes for Manage Awards.

Manage Awards

To search for an Award, select the Tasks icon and Manage Awards on the right hand side of the Awards search screen.

Reports and Analytics

Reports and Analytics can be selected from the Awards screen. Use the reporting icon under Tasks display the Reports and Analytics folder.