eUMB
Financials 2009

http://www.umaryland.edu/eumb/training/training_info_page

Introduction to *e*UMB Financials

plus Chart of Accounts Overview

eUMB Financials
Quick Reference Guide to Required Training

<table>
<tr><th></th><th>Requisitioner</th><th>Dept. Requisition Approver</th><th>Receiver</th><th>Dept. JE Initiator</th><th>Pro Card Viewer</th><th>Pro Card Reallocator</th><th>Any Commitment Accounting Role</th><th>All RAVEN Roles*</th><th>Dept Grant Viewer</th><th>Requester</th></tr>
<tr><td>Introduction to eUMB Financials with Chart of Accounts</td><td>X</td><td>X</td><td>X</td><td>X</td><td>X</td><td>X</td><td></td><td>X</td><td>X</td><td rowspan="8">No training required.

Requester role does not need to access eUMB Financials.</td></tr>
<tr><td>PROCURE: Intro to Corporate Purchasing Card Prog. (replaces Pro Card</td><td></td><td></td><td></td><td></td><td>X</td><td>X</td><td></td><td></td><td rowspan="7">For <u>only</u> Dept Grant Viewer, take Introduction to eUMB Financials.

No additional training is required if user already has access to eUMB Financials. Just request to add the role.</td></tr>
<tr><td>Receiving Goods and Services</td><td></td><td></td><td>X</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Understanding the Connection Between HRMS & Financials</td><td></td><td></td><td></td><td></td><td></td><td></td><td>See Payroll Website for Presentations</td><td></td></tr>
<tr><td>Using the New Chart of Accounts in Commitment Accounting</td><td></td><td></td><td></td><td></td><td></td><td></td><td>See Payroll Website for Presentations</td><td></td></tr>
<tr><td>Working with Journal Entries</td><td></td><td></td><td></td><td>X</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Working with Requisitions</td><td>X</td><td>X</td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>RAVEN for eUMB Financials Users</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>X</td></tr>
</table>

*** Training is not <u>required</u> for access to RAVEN, but it is strongly recommended.**

Last Updated 04/25/2011

Roles and Required Training in *e*UMB Financials

*** All *e*UMB Financials courses require attendance at Introduction to eUMB Financials including Chart of Accounts Orientation <u>prior</u> to attending any other course.**

eUMB Role – Financials:	***REQUIRED Training for eUMB Financials Access*:***
Dept Journal Entry Initiator • Enters Journal Entries that move amounts from one UMB account to another.	Introduction to *e*UMB Financials including Chart of Accounts Working with Journal Entries
Pro Card Viewer • Pro Card Holders are NOT REQUIRED to be Pro Card Viewers but they do remain responsible for card transactions in the system.	Introduction to *e*UMB Financials including Chart of Accounts PROCUREMENT: Intro to Corporate Purchasing Card Program (includes ProCard reallocation in *e*UMB Financials)
Pro Card Reallocator • Automatically receives Pro Card Viewer role. • Reallocates procurement card expenses from the default project to the project that should bear the expense.	Introduction to *e*UMB Financials including Chart of Accounts PROCUREMENT: Intro to Corporate Purchasing Card Program (includes ProCard reallocation in *e*UMB Financials)
Receiver • Acknowledges in eUMB Financials the receipt of goods delivered or services rendered. Indicates payment should be made.	Introduction to *e*UMB Financials including Chart of Accounts Receiving Goods and Services
Requester • Role is used to identify a specific individual's Ship To address on a purchase requisition. Also places individual's name on Attention: line.	*No training required. The individual has no access to eUMB Financials.*
Requisitioner • Can also hold Dept Requisition Approver role, but cannot act as BOTH Requisitioner and Approver on the same requisition. • Can hold Dept Requisition Approver role also, but cannot act as BOTH Requisitioner and Approver on the same requisition	Introduction to *e*UMB Financials including Chart of Accounts Working With Requisitions
Dept Requisition Approver • Can also hold Requisitioner role, but cannot act as BOTH Requisitioner and Approver on the same requisition. • Can hold Requisitioner role also, but cannot act as BOTH Requisitioner and Approver on the same requisition	Introduction to *e*UMB Financials including Chart of Accounts Working With Requisitions
Dept Grant Viewer • This role provides access to UMB Grant Project View as well AR Aging, AR Item Activity and UMB Restricted Funds Payments reports.	Introduction to *e*UMB Financials including Chart of Accounts

Roles and Required Training in *e*UMB Financials

*** All *e*UMB Financials courses require attendance at Introduction to eUMB Financials including Chart of Accounts Orientation <u>prior</u> to attending any other course.**

eUMB Role – RAVEN Financials Inquiry pages:	*RECOMMENDED Training for RAVEN Financials Inquiry Access:*
RAVEN User with access to (some or all): All Activities Page (summarized financial transactions) Transaction Details Page (detail at transaction level) Grants Pages: Summary, Standard, Deliverable Plant Fund Page SPC Inquiry Page Pro Card Inquiry Page	Introduction to eUMB Financials including Chart of Accounts RAVEN for eUMB Financials Users
RAVEN User with access only to SPC Inquiry (Statement of Payroll Charges)	Introduction to eUMB Financials including Chart of Accounts RAVEN for eUMB Financials Users
RAVEN User with access only to PCard Inquiry (Procurement Card transactions only)	Introduction to eUMB Financials including Chart of Accounts RAVEN for eUMB Financials Users

*e*UMB Financials

Training Information Page

Use the links on this page to select courses you'll need, enroll in the course, practice using course files online and print course materials.

If you have additional questions, contact the Training Team by e-mail at: DL-CITSeUMBTrainingTeam@umaryland.edu.

Determine the Roles You Will Fulfill in eUMB Financials:

- Roles and Required Training in eUMB Financials

Select the Courses You Need:

- Quick Reference to Required Training -- eUMB Financials

Enroll in Courses and Locate the Classroom

- Enroll at the Enterprise Training Enrollment Database
- Locate the classroom at Classroom Locations

Practice Using Course Files Online

- Go to Course Files (UPK Tutorials - Internet Explorer or Firefox)
- Go to Course Files (UPK Tutorials - HTML only)

Course Materials

- Introduction to eUMB Financials (02/21/08)
- ProCard Reallocation (04/24/08)
- Receiving Goods and Services (02/21/08)
- Working With Journal Entries (09/09/08)
- Working With Requisitions
- RAVEN for eUMB Financials Users (09/14/10)

Additional Materials

- Using Excel with RAVEN Data: 5 Tutorial Series
- Life After Fetch: Using Excel with RAVEN
- Running Reports in eUMB Financials
- Financial Reporting: Sponsored Grants and Contracts
- Creating Your First Password for myUMB Campus Portal

Useful Links

- UMB Campus Portal
- Where to Go for Help
- Supported Browsers & Setting Up Trusted Sites
- Frequently Asked Questions

eUMB Financials Training Information Page

http://www.umaryland.edu/eumb/training/training_info_page

Some Best Practices
For Working With Web-based Applications
February 2008

We've put together several tips that will help you use *e*UMB Financials and other web-based applications with fewer problems. Here's a recap of the tips you'll find on the following pages:

1. Use a supported browser and operating system.
2. Turn off all pop-up blockers while using *e*UMB Financials.
3. Manage open windows, keeping 5 or fewer open at once.
4. Set up *e*UMB Financials as a Trusted Site in Internet Explorer.
5. Clear your browser's cache occasionally (clean out your PCs temporary internet files).
6. Be careful when using a mouse with a wheel.

Use a Supported Browser and Operating System

UMB recommends the Internet Explorer web browser running on Windows 2000 or XP PC for the *e*UMB financial user community. This combination will deliver an optimal user experience.

Below are the combinations of web browsers and client operating systems that PeopleSoft supports. The UMB recommended configurations are in bold.

Windows XP
- **Internet Explorer 6**
- Internet Explorer 7
- Netscape Navigator 7.x

Windows 2000 and NT
- **Internet Explorer 5 and above**
- Netscape Communicator 4. 7x/4.8x
- Netscape Navigator 7.x

Mac OS 9 and X
- Internet Explorer 5
- Netscape Communicator 4. 7x/4.8x
- Netscape Navigator 7.x

Notes:
Adobe Acrobat Reader (version 5.x, 6.x, 7.x or 8.x) is required to view reports and attachments saved in PDF format. Adobe Reader can be downloaded from Adobe's site, located at: http://www.adobe.com/products/acrobat/readstep2.html.

Turn Off All Pop-up Blockers

Google toolbar, Yahoo's toolbar, Internet Explorer and other applications contain pop-up blockers. Each also has the option to turn off the pop-up blocker. When using *e*UMB Financials, you will most likely run into times when an activated pop-up blocker prevents *e*UMB's window from opening. Active pop-up blockers, for example, could prevent you from viewing or saving downloaded data to Excel or from viewing report results.

Manage Open Windows

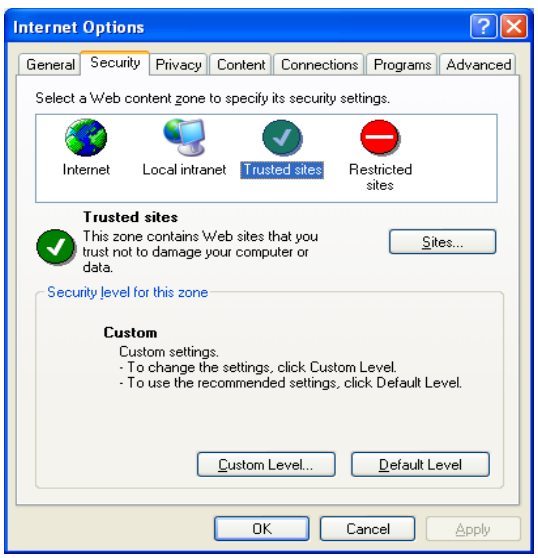
Keep open *e*UMB Financials windows to 5 or fewer. Above 5 open windows, *e*UMB Financials sometimes ‘loses track’ of where it is and what you are doing. Manage your open windows by closing them as soon as you are done using them. It’s easy to re-open a window with just one mouse click (on the New Window link in the upper right corner of every page).

Set up *e*UMB Financials as a Trusted Site in Internet Explorer

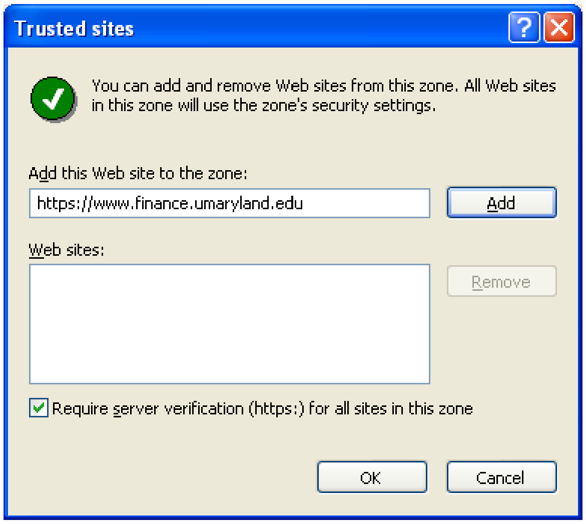
The most likely cause of problems with opening attachments, forms, and additional windows while in the *e*UMB Financials application is related to the browser’s internet security settings. When using the recommended browser (Internet Explorer), the easiest way to correct the problem is to define the *e*UMB Financials URL as a Trusted Site. The following steps guide you through adding a web site to Internet Explorer’s list of trusted sites:

<u>Adding a Web Site to the List of Trusted Sites</u>: Internet Explorer sets up the trusted zone with a low security level to make it easier for you to do such things as download software without prompting. You can add a site to this zone if you trust that it would *never* cause harm to your computer.

1. On the Internet Explorer **Tools** menu, click **Internet Options**.
2. Click the **Security** tab.
3. Click the **Trusted Sites** button
4. Click the **Sites** button.



5. In the **Add this Web site to the zone** box, Type: [**https://www.finance.umaryland.edu**](https://www.finance.umaryland.edu)



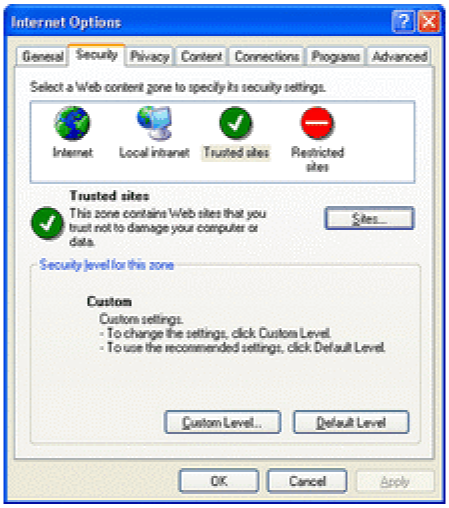
6. Click the **Add** button.

7. Click **OK** twice.

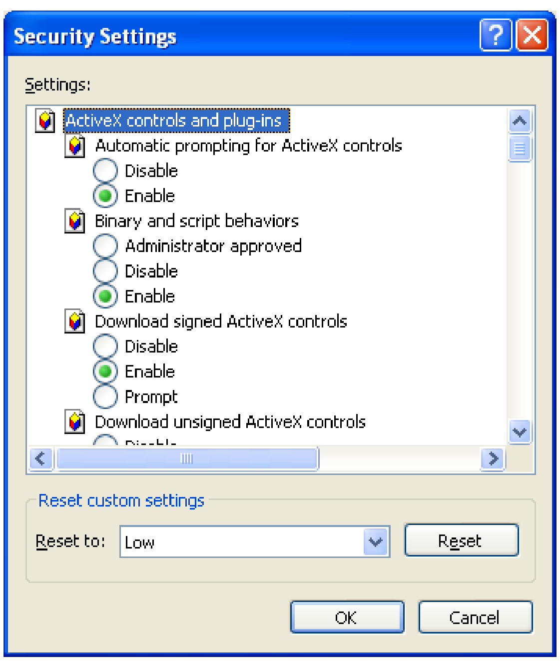
Tip: To see the list of Web sites you've added to Trusted and Restricted sites, on the Internet Explorer **Tools** menu, click **Internet Options**. Click the **Security** tab, and then click either **Trusted sites**. Click the **Sites** button to see the list. When you're finished, click **Cancel** twice.

Changing or Verifying the Security Level of a Trusted Site Zone: The following steps show you how to change or verify the security level of a Trusted Site zone, should you need to do so. Follow these steps to raise or lower the threshold of security for any zone.

1. On the Internet Explorer **Tools** menu, click **Internet Options**.
2. Click the **Security** tab, and then click the **Trusted Sites zone**, and then click **Custom Level** to verify or change the security level.



3. If the setting is not on low, set it to **Low**.
   Internet Explorer describes each option to help you decide which level to choose, asking for confirmation when you loosen its restrictions.



4. When you've finished, click **OK**.

Clear Browser Cache Occasionally

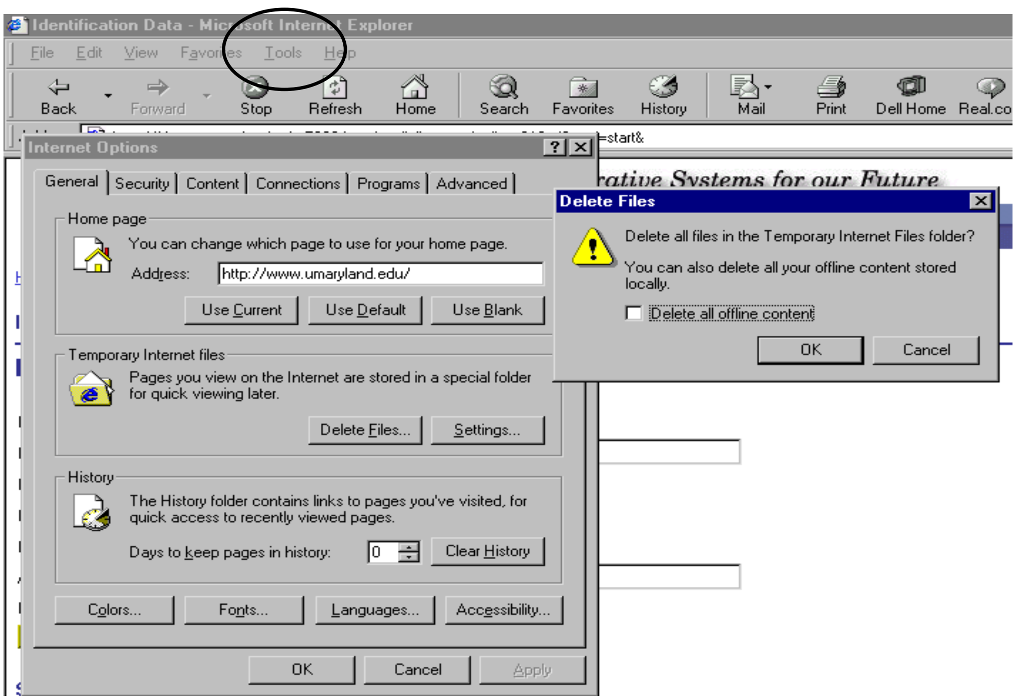
It is good practice to periodically clear your browser cache. Clearing cache cleans out your temporary internet files that accumulate as you view and work on the web. Simply put, this is like changing the oil in your car, cleaning your browser of "painted" pages of Internet sites you've visited. Your browser keeps these pages in memory to make it easier and faster to open and re-visit those pages.

When you have accumulated too many of these pages, unanticipated errors occur. Cleaning the browser cache occasionally will make your *e*UMB experience faster and more efficient. How often you clean cache depends on how much you use the internet. For most users, clearing cache once a month or so will suffice.

To clear the cache in Internet Explorer follow these steps:

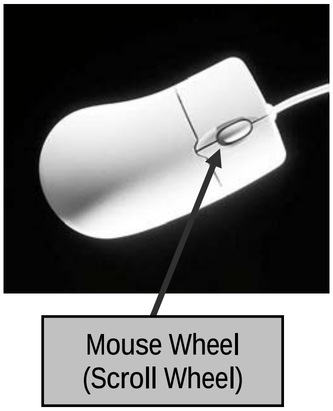
1. Choose **Tools, Internet Options** from your Menu Bar.
2. In the Internet Options dialog box, click the button marked **'Delete Files…'**.
3. The Delete Files dialog box opens, displaying the question: '**Delete all files in your Temporary Internet Files Folder?**'.
4. Click the checkbox to the left of 'Delete all offline content'
5. Click **OK** in the Delete Files dialog box to begin the delete.
6. Click **OK** in the Internet Options dialog box.

TIP: Since you must completely power down your PC to fully delete your temporary Internet files, you may wish to clear cache as you are closing down your machine at the end of your workday.



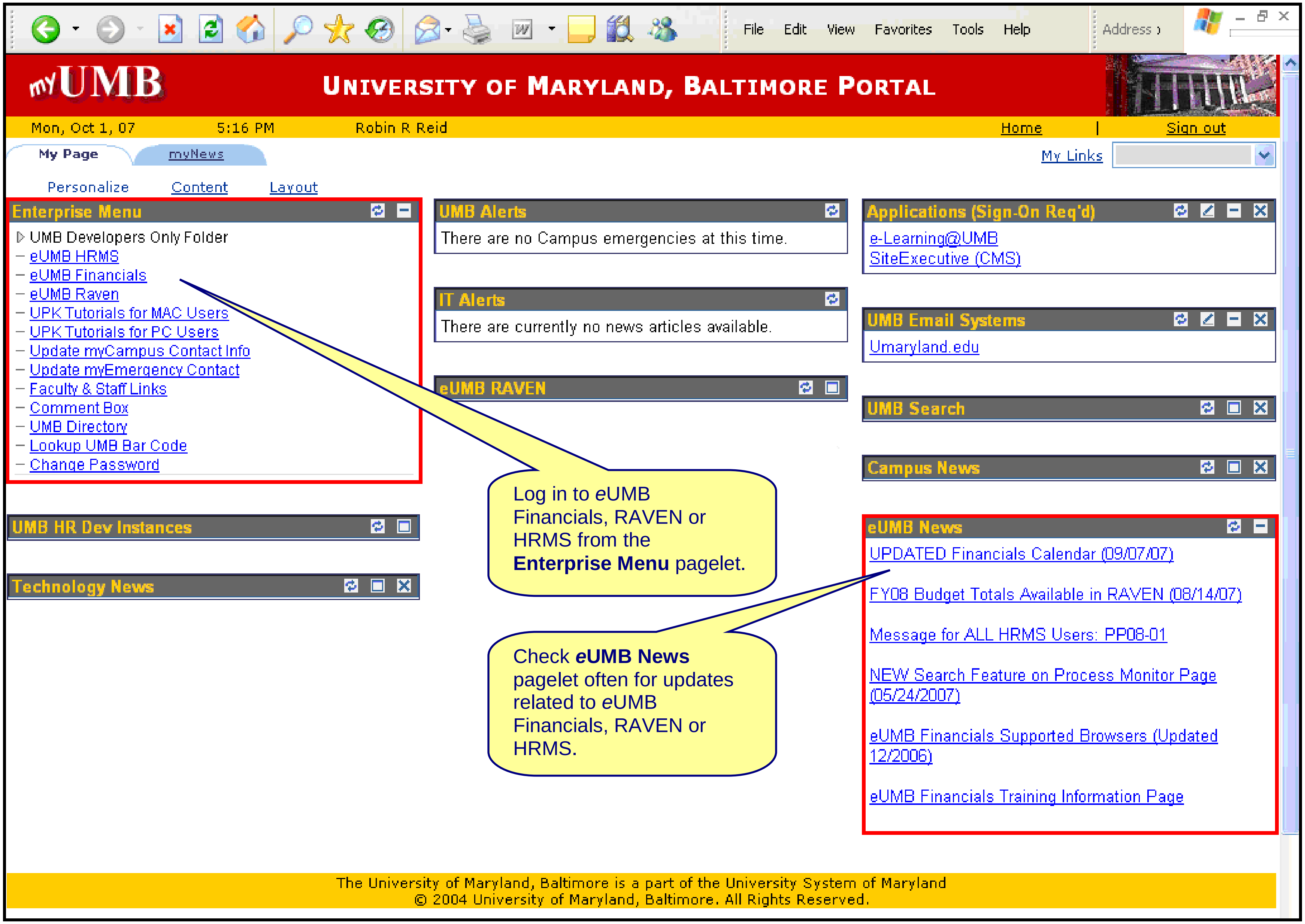
Note:
All screenshots were taken using Internet Explorer version 6.x. Other versions of Internet Explorer may look a little different.

Be Careful When Using a Mouse with a Wheel



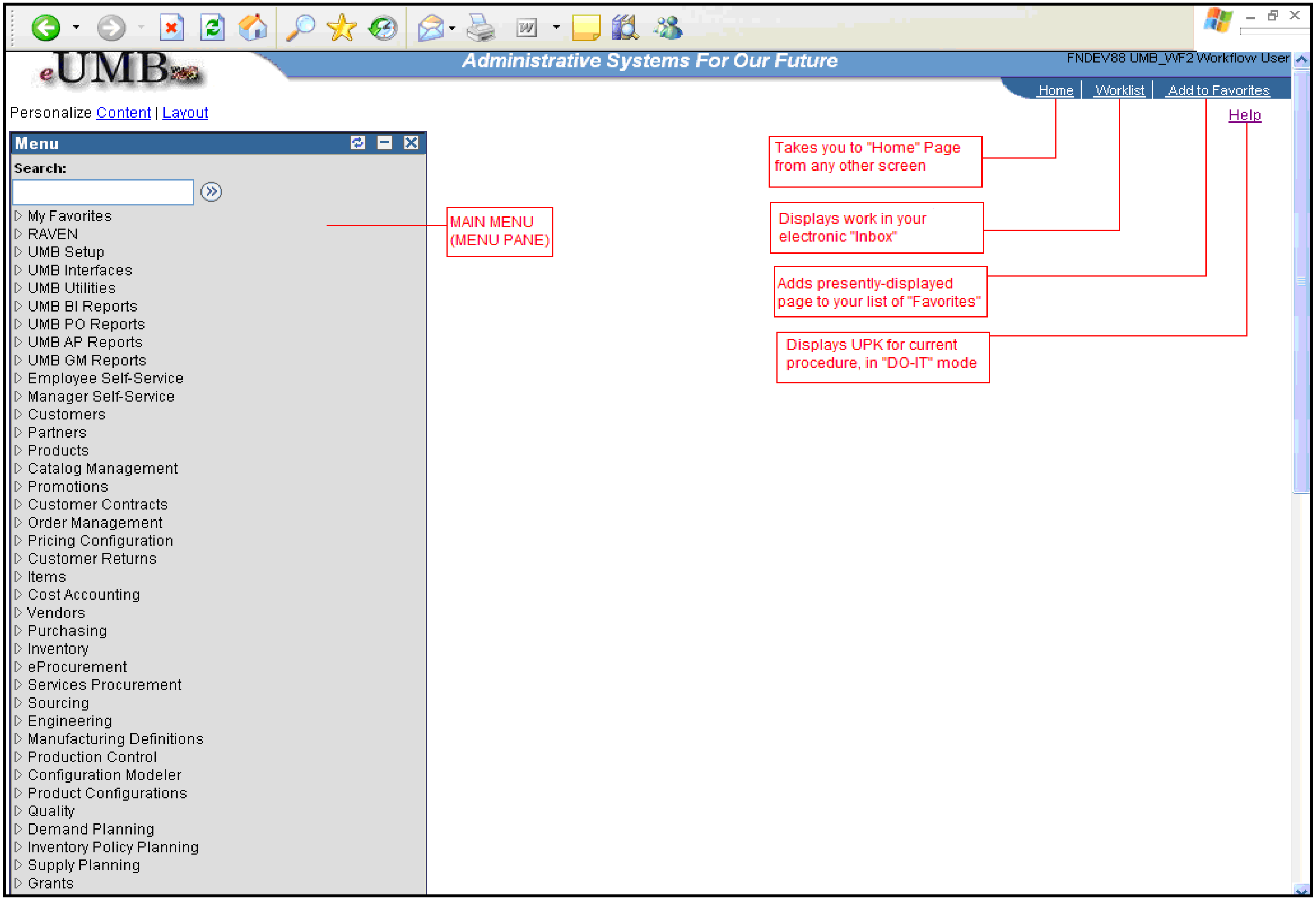
If your computer's mouse has a scroll wheel, be careful when selecting from lists. In some instances, bumping the wheel as you move the mouse can result in changes to your selection. To avoid this situation, follow these steps:

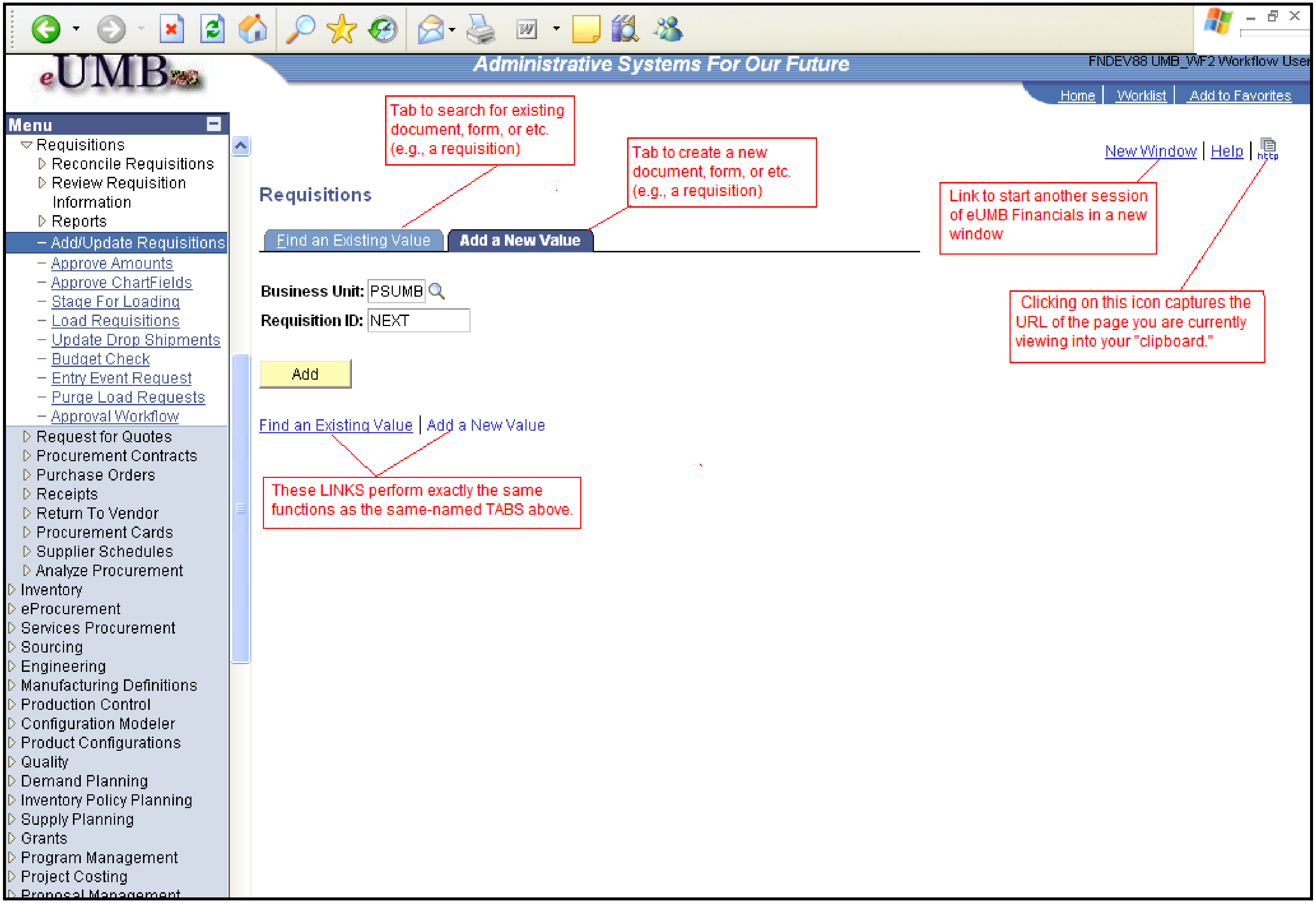
1. **Select** from a list by clicking on your choice. The background is probably highlighted (usually in blue), indicating that the item is still selected.
2. **De-select** the item by clicking in an open space on the page. The background will not be highlighted anymore. The item is de-selected.
3. **Move** the mouse pointer to your next step. (Choose any method of moving to the next step, including using the mouse wheel to scroll if applicable.)



Campus Portal Home Page
www.umaryland.edu/myumb

Overview: *e*UMB Financials HOME Page




eUMB
Administrative Systems For Our Future
FNDEV88 UMB_WF2 Workflow User
Home
Worklist
Add to Favorites
Menu
Requisitions
Reconcile Requisitions
Review Requisition Information
Reports
Add/Update Requisitions
Approve Amounts
Approve ChartFields
Stage For Loading
Load Requisitions
Update Drop Shipments
Budget Check
Entry Event Request
Purge Load Requests
Approval Workflow
Request for Quotes
Procurement Contracts
Purchase Orders
Receipts
Return To Vendor
Procurement Cards
Supplier Schedules
Analyze Procurement
Inventory
eProcurement
Services Procurement
Sourcing
Engineering
Manufacturing Definitions
Production Control
Configuration Modeler
Product Configurations
Quality
Demand Planning
Inventory Policy Planning
Supply Planning
Grants
Program Management
Project Costing
Tab to search for existing document, form, or etc. (e.g., a requisition)
Tab to create a new document, form, or etc. (e.g., a requisition)
New Window
Help
Link to start another session of eUMB Financials in a new window
Requisitions
Find an Existing Value
Add a New Value
Business Unit: PSUMB
Requisition ID: NEXT
Clicking on this icon captures the URL of the page you are currently viewing into your "clipboard."
Add
Find an Existing Value
Add a New Value
These LINKS perform exactly the same functions as the same-named TABS above.

UPK Mode	Functionality
See It!	See It! mode is an automated walk-through of the selected topic. As you watch, the screens automatically advance through the process. Pressing the "Enter" key also allows you to advance to the next step in See It! mode. A "Pause" link allows you to pause the playback at anytime, and clicking the "Resume" link allows playback to continue
Try It!	Try It! mode allows you more control of the pace of the lesson. You will advance through the topic by following the instructions in the yellow bubble and completing an action, or by pressing the "Enter" key.
Know It?	Know It! mode allows you to test your knowledge of the subject matter. Unlike the other three modes, you will not receive step-by-step instructions, but will need to complete the steps on your own. You will be "scored" on how accurately you complete these steps. You may complete the Know It! mode for each topic as many times as you like. Keep in mind that these scores are for your personal use only -- no one is tracking or grading you on your progress!
Do It!	Do It! mode is intended to provide support when you are in the live PeopleSoft application. If you encounter difficulty within the application and click on "Help," you will be directed to the UPK player. Navigate to the topic you need assistance with and click on Do It! A new window will be displayed on your screen, which will allow you to click forward and back through the steps of how to complete a transaction within the live application. **NOTE: In order for this function to work you must first set up the URL for *e*UMB Financials (https://finance.umaryland.edu) as a *Trusted Site*.**

Navigating eUMB Financials (02/04/08)

1.	The myUMB Campus Portal -- **https://myumb.umaryland.edu** -- is your gateway to *e*UMB Financials, other Enterprise applications and other information as well. NOTE: The first time you log in to the Campus Portal, you will need to create your password. Click the **First Time User, Setup Your Password** link to create your first password and secret question. For additional assistance please contact the Campus Help Desk at 410-706-4357 (6-HELP). To log in you will enter your myUMBID (EmplID or Affiliate ID), and your Portal password on the login page you see displayed here, then click **Sign In** to open the Portal.
2.	Once you become an authorized user of *e*UMB Financials your Portal page will display a link to *e*UMB Financials inside the **Enterprise Menu** pagelet. That link will take you directly into the *e*UMB Financials system, without the need to logon again.
3.	Pictured here is the **Home Page** of *e*UMB Financials. (Your Home Page will have far fewer menu options!) The **Menu Pane -** on the left side of the page **-** lists the groups of pages that you are authorized to use. We will discuss more about the Menu Pane shortly, but for now let's start the "tour" in the upper right-hand corner of the page.
4.	Notice that in the top right corner of the border of the page you see the name of the database, and the Empl ID and name of the person who is logged on. Here you see that user **Brook Botvin** is using **FNPROD** the Financials production database. You will see appropriate information for yourself when you work in the live *e*UMB Financials system.
5.	The series of links that appears just below this database and user information on every page of *e*UMB Financials is known as the **Universal Navigation Header**. The links that you will see here are: Home, Worklist, and Add to Favorites.
6.	You click on **Home** to return to the Home Page of *e*UMB Financials from anywhere else in the application. HINT: Always use eUMB's navigation features to move throughout the application. Using the browser back button to return to a previously-visited page can result in losing data that you just entered. Continued use of the browser back button will cause your session to end abruptly as *e*UMB Financials loses track of your navigation.

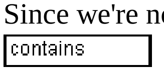
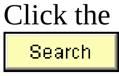
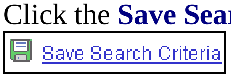
7.	The **Worklist** link will display the Worklist Page, your personal, automated To-Do list containing summary information about all workflow items awaiting your attention. Examples of worklist items include: -- requisitions awaiting approval -- requisitions returned by the Dept Approver to the Requisitioner for re-work The next three frames show an example of how the Worklist looks and operates.
8.	For example, If I were a **Departmental Requisition Approver**, this is what my **Worklist** might look like. I would select the particular Requisition I want to work on by clicking on the **blue link** in the right-hand column.
9.	That would display a page on which I can review all aspects of the Requisition--who entered it (the Requisitioner), on whose behalf (the Requester), the details of the requisition itself, any comments that the Requisitioner might have attached to it, etc.
10.	Based on my review, I would Approve or Deny it. If denied, it goes back to the Requisitioner's **Worklist**. If Approved, it goes on to the **Worklist** of the **General Accounting** group...and so forth.
11.	**Add to Favorites** is your link for storing and editing Favorites inside *eUMB Financials*, which are much like favorites or bookmarks in a Web browser. (See the topic entitled *Saving and Editing Favorites* for details.)
12.	*e*UMB Financials uses what is called a **Menu Pane** to display a hierarchy of folders and content references that you can use to navigate from page to page throughout the system. The **Menu Pane** works very similarly to the way *Windows Explorer* displays a list of folders and enables you to "drill down" from the folders to the subfolders and files on your PC or network drive. Expanding and collapsing the Menu folders then clicking on the name of the page or function you need is one way of getting around in *e*UMB Financials. **NOTE: The menu list that you will see when you actually work with the system will be *much shorter* than the one that appears here.**
13.	As an example, we are going to navigate to the page where we would update a Requisition. Click the **Purchasing** link. Purchasing
14.	Click the **Requisitions** link. Requisitions

15.	Notice that in addition to the **Navigation Menu**, *e*UMB Financials often displays a set of more *graphic* navigation pages like the one you see here for Requisitions. This one is called the **Requisitions Center**. Similarly, as you work with the system you will see navigation "Centers" similar to this for Pro Card, Journal Entry, etc. When you work with *e*UMB Financials, it is totally your choice as to whether you navigate using the **Menu Pane** on the left or the icons and links from the appropriate "**Center**." You may also choose to work with both. In these UPK lessons we have chosen to always work from the **Menu Pane**.
16.	Click the **Add/Update Requisitions** link. 
17.	The real work in *eUMB Financials* is performed at the **component** level. Components consist of several **pages** within the same window. Usually these pages are related and need to be completed in succession. To move from page to page, you can select the **folder tabs**, press the corresponding **access key** combination, or click the **links** provided towards the bottom of each page.
18.	Once you have reached the page you need to work on, you can, if you choose, collapse the menu pane so you can see more of the component page without scrolling. Click the **Collapse (Ctrl+Y)** button. 
19.	At any time you can maximize the menu pane once again by clicking on the little **Expand** icon that remains in the upper left corner of the page. Click the **Expand (Ctrl+Y)** button. 
20.	**Links**--short for "hyperlinks"--to other pages in the component appear below the row for buttons. (The present page has only one button-- *Add*--in this "row.") Notice that these links at the bottom of a page (sometimes referred to as "bottom links") take you to the same places as the **Tabs** at the top.
21.	Occasionally you will see pages that, in addition to having links to other pages within the component, have links to *related* pages or components. The related links appear *above* the row of buttons. You can click any one of the links to access that page or component. This convenience enables you to move easily to related transactions to enter data without going through the search process again.
22.	Just below the Universal Navigation Header is the area known as the **pagebar**, which is a series of links and buttons. All options may not be available for each component.

23.	You can use the **<u>New Window</u>** link to open a new browser window. (In technical documentation you may see the new window referred to as a "child" window to the "parent" window from which you started.) In this case the new window is an exact copy of the component page you were on. (If you had been in the middle of entering a Requisition it would have opened at the page where you ***start*** that process, to keep from having the same requisition open twice.) This new window represents a whole new work session, in which you can, for example, navigate to a different part of the system and view or enter data without disturbing where you are in your original window. HINTS for using New Windows successfully: **-- Open only 4 or FEWER 'New Windows' at one time.** **-- Open new windows ONLY with the New Window link.** (Opening new windows using a web browser "new window" feature will not work successfully. (It simply opens a snapshot of the parent window, instead of actually starting an additional eUMB Financials work session in a new window.) Click the **New Window** link. New Window
24.	Notice that you now have a new window overlaying the original one. The new window starts out as an exact copy of the original one you were working in, but once open it functions as an independent session of *eUMB Financials*. You might want to use this new window to... -- conduct a *Search* -- open one of your *Favorites* -- find a particular piece of information (e.g., a code or value to fill in a chartfield), *Copy* it, then *Paste* it back into a field on the parent window where you were originally working A good rule of thumb for New Windows is: **When you are finished using the new window, close it.** Having multiple windows open for extended periods can become confusing. And if more than 4 New Windows are open at once it becomes difficult for eUMB Financials to track what you are doing. Click the **Close** button. 
25.	The **<u>Help</u>** link is context-sensitive to the specific *transaction* page that you are working on when you click **Help**. (It does not bring back context-sensitive results for search pages.) Clicking the Help link activates the UPK Player which displays topics related to the transaction page. Topics can then be reviewed in any mode including "Do It!" mode. Running a UPK topic in "Do It!" mode opens a small window which floats over the lower right-hand corner of the page where you are working in eUMB Financials. "Do It!" mode remains open as you work in *e*UMB Financials, guiding you through the steps needed to complete the transaction.

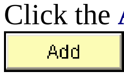
26.	Clicking on the **http** icon captures the complete Web address (URL) of the page where you are working to the clipboard so that it is available for pasting into emails or other applications. The copied URL includes information about the path you took to get to where you are. This could be useful, for example, if you are trying to troubleshoot or get technical help with a problem you are having.
27.	After making any changes to a page, you must click the **Save** button in order for the system to commit your changes to the database. Pages in a component are treated as a single entity when you try to save data. If you have not completed all required fields, the system prompts you to enter the additional required data.
28.	If you have entered data on one or more pages of a component, and try to leave it without saving your work, you will get an error message like the one displayed here. Read the message carefully in order to know whether you really want to click **OK** or **Cancel.** Click **OK** to return to the page and save your work. Click **Cancel** to move on to the next frame as you would to exit the page/component where you are working in *e*UMB Financials**.** 
29.	When you are ready to leave *e*UMB Financials, you simply click on the "X" in the upper right-hand corner of the page, the way you would normally close any Web browser window. Click the **Close** button. 
30.	Even though you close the *e*UMB Financials window, you may still have your *myUMB* Portal page open, which means that *e*UMB Financials can still be accessed just by clicking the link in the Enterprise Menu pagelet. Click the **Sign Out** link on the Portal page when you are finished working with *eUMB Financials* and other applications that you may access via the Portal. Click **Sign out** to exit completely. 
31.	You have successfully completed the topic on **Navigating in *e*UMB Financials.** **End of Procedure.**

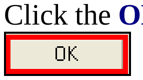
Using Search (02/04/08)

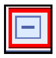
1.	We're working with a huge database of information; the logic of the system is that you have to start by specifying *which* document or transaction you want to work on so that it can retrieve the right data for you. Specify details about the document or transaction on a **Search** page. **Search** pages similar to the one you see here appear throughout the *e*UMB Financials system, typically as soon as you navigate to the *component* level for the work you need to do. You will encounter similar search pages while doing Requisitions, Receiving, Journal Entries, viewing or reallocating Pro Card expenses or whatever. Sometimes you may need to click on the "Find an Existing Value" tab or link to make it display. The **Advanced Search** page which offers more search options is pictured here. The **Basic Search** screen works the same way, but it offers fewer search options.
2.	Let's say that our task is to locate and view a certain requisition. You could use a single search field (such as Requester Name) or a combination of search fields (such as Business Unit and Requisition ID) to narrow your search for the requisition. **Operators** can be used to further define your search criteria. Notice that almost all of the named fields on this page have the option to use operators (boxed in blue). Display operator drop-down lists by clicking the blue, down-pointing arrow to the right of the operator. In this example, we want to search for all requisitions with the Requester Name of Jackie Cholewczynski, but all we can remember for sure about how this name is spelled is that it has the letter combination "**czy**" somewhere in it.
3.	Click the drop-down arrow on the operator box next to **Requester Name**. 
4.	Since we're not sure what letter it begins with, click on **"contains."** 
5.	Next enter the desired information into the **Requester Name** field. Enter a valid value e.g. "**czy**".
6.	Click the **Search** button. 
7.	The **Search Results** table displays 65 Requisitions with different Statuses (Open, Pending, Approved), all of them in the name of Requester Jackie Cholew**czy**nski.
8.	Now suppose you know that it is very likely you will need to do a search just like this--for Requisitions requested by Jackie--at sometime in the future. *eUMB Financials* provides an excellent, time-saving feature: Click the **Save Search Criteria** button. 

9.	Enter a ***Name*** for this search into the **Name of Search:** field. Enter a valid value e.g. "**Jackie's Reqs**".
10.	Click the **Save** button. 
11.	You have now saved the search criteria under the name "Jackie's Reqs." Click the **Return to Advanced Search** link. 
12.	Now click the drop-down arrow next to the **Use Saved Search:** field. 
13.	The system displays your list of saved favorite searches (only one so far) for your use at any time in the future! This search can be edited simply by making changes, then re-saving with the name of Jackie's Reqs. Press **[Enter]** to continue.
14.	Now back to what we were doing: Somewhere in the list of 65 requisitions that meet our basic search criteria is the one we are looking for.
15.	We know that the requisition we are looking for has a Status of "**Open**." So we scroll down the list and find it that way. Click to select Requisition **#0000000183** from the **Search Results** table.
16.	Once this Requisition is retrieved you would be able to continue work, *Save* your changes, then submit it for approval.
17.	You have successfully created and saved a search, then used the **Search** function to retrieve a Requisition that needed to be completed. The same process can be used to search for a Purchase Order, Receipt, Journal Entry, or etc. **End of Procedure.**

Using Lookup, Adding & Deleting Rows (02/04/08)

1.	In this scenario your task is to create a Requisition. The very first field that you need to complete is **Business Unit**. This happens to be an easy field to fill in, but we'll use it as an example. Anytime anywhere throughout *eUMB Financials* that you see the **Lookup Button (magnifying glass)** next to a field, you can use the **Lookup** function to find the correct value**.** In many places Lookup will return a "filtered" list, displaying only those values that pertain to your access to data. Click the **Business Unit Lookup** button. 
2.	The **Search Results** list that displays in this case has only two values to select from--PUR01 for Regular Procurements and PUR02 for certain Check Requests. Click the **PUR01** link. 
3.	Click the **Add** button. 
4.	Suppose that in this case we are creating a requisition to purchase 1 year's worth of Software Maintenance services. On this campus we don't use the *Item* field, so go right to the **<u>Description</u>** field and key in the words
5.	We know that we want a One Year contract, so enter a into the **Quantity** field id value e.g. "**1**".
6.	We know that the **Unit of Measure (UOM)** in this case is "Year" but we don't know if the system is looking for "year," "YEAR," "YR" or what, so again we use **Lookup**. Click the **UOM Lookup** button. 
7.	This time the **Search Results** list has 90 entries. But notice that only the "First 1-15 of 90" entries display on the page at one time. Since they are in alphabetical order, our Unit of Measure - "Year" - will fall close to the end of the list. We *could* click on the **Unit of Measure** column header to *re-sort* the list in *descending* order to see the end of the alphabet. But instead we'll choose the option of clicking on the **Last** link to display the *Last* group of 15 entries in the list (#76-90). Click the **Last** link. 

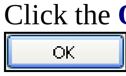
8.	Now we see the *Last* 15 entries on the **Search Results** list, and there it shows that **YR** is the Unit of Measure designation for "Year." Click the **Sel (Select)** box next to the **YR** Unit of Measure. 
9.	The same procedure works for the **Category** field. Click the **Category Lookup** button. 
10.	This time **Search Results** displays all 83 possible selections, so we can simply scroll down to find the category we are looking for. Click the **Scroll Bar** to scroll down towards the bottom of the list.
11.	Select the **Software Maintenance** category. Click on **SOFTWARE MAINT**. 
12.	The **Category** field is automatically filled in with your selection, **SOFTWARE MAINTENANCE .** Easy, right?
13.	**Now briefly on to a different topic - Adding & Deleting Rows.** **Adding Rows** Here we have a different Requisition for 1 computer server. Suppose while creating this we realize that we need to order a computer monitor as well. We'll need to add another row in order to enter this second line item. We accomplish this by clicking on the **Add Multiple New Rows button** (the plus sign) at the end of the row. Click the **Plus Sign ("+")**. 
14.	The system then prompts you for a number indicating ***how many rows need to be added***. If more than one row needs to be added, then simply type in the desired number. If the default "1" is correct, then you accept this number by clicking the **OK** button. Click the **OK** button. 

15.	**Deleting Rows** Here is the revised Requisition with the additional line for the monitor added and filled in. If you change your mind at this point and want to *delete* a row, you would do that by clicking on the **Delete Row(s) symbol** (the minus sign). Click on the **minus sign ("-")**. 
16.	This would delete *only that single row* where you clicked on the minus sign, leaving the rest of the requisition intact.
17.	You have successfully completed the topic **Using Lookup, Adding and Deleting Rows** in *e*UMB Financials. **End of Procedure.**

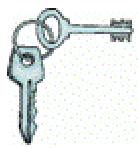
Saving and Editing Favorites (02/04/08)

1.	Let's say that as you begin to work with *e*UMB Financials you would like a current list of *e*UMB Financials chartstring values associated with your department. For such a list, you will run the **UMB Projects by Department Report**. It would be convenient to mark the UMB Projects By Department Report as a Favorite since you will want to run it periodically to pick up any new projects that have been added to eUMB Financials. Begin by navigating to the UMB Projects by Department Rpt page. Click the **General Ledger** link. General Ledger
2.	Click the **General Reports** link. General Reports
3.	Click the **UMB Projects by Department Rpt** link. UMB Projects by Department Rpt
4.	Once you navigate to and display any particular page, you have the option to add it as a Favorite. To add this page as a Favorite click the **Add to Favorites** link. Add to Favorites
5.	A default description of the page will display in the *Description* field--in this case, "UMB Projects by Department Rpt." You can change this wording as you like. When you have it the way you want it, click "**OK**." Click the **OK** button. OK
6.	You will be returned to the page from which you started. Let's say that you decide that you would also like to save the Procurement Card **Reconcile Statement** page as a Favorite as well. Navigate to the Reconcile Statement page. Click the **Purchasing** link. Purchasing
7.	Click the **Procurement Cards** link. Procurement Cards

8.	Click the **Reconcile** link. ▷ Reconcile
9.	Click the **Reconcile Statement** link. Reconcile Statement
10.	You have reached the Reconcile Statement Search page - the first step in reallocating Pro Card charges. Save this page as a Favorite. Click the **Add to Favorites** link. Add to Favorites
11.	You decide to rename the Favorite "Reallocate Pro Card". After selecting the default name ("Reconcile Statement" in this example) enter your own page description into the ***Description** field. Enter a valid value e.g. "**Reallocate Pro Card**".
12.	Click the **OK** button. OK
13.	Now let's go back and see the *Favorites* we just entered and how we can edit our list of Favorites if we choose to. Click the **Home** link. Home
14.	In order to see your list of saved Favorites, click the **My Favorites** link. ▷ My Favorites
15.	Click the **Edit Favorites** link. Edit Favorites
16.	Notice in the **Menu Pane** that the two Favorites we just entered have been added to a list that already included several others. By clicking on the **Edit Favorites** link we have also displayed them on the page in a table where we can edit them. This page offers options for searching through and displaying your Favorites if the list has gotten too long to see it all at once. For example, you can **Find** a Favorite by name, or display your list starting with the **First** or **Last** *group* (however many display on the screen at once).

17.	You can also rearrange the order in which your list of Favorites appears by clicking on the appropriate column headers: **<u>Favorite</u>** sorts in ascending or descending order alphabetically. **<u>Sequence number</u>** sorts in ascending or descending order based on sequence numbers you can assign to your entries. Notice that this list of favorites is now arranged by Sequence Number. If all sequence numbers are '0', the Favorites list appearing on the menu will be in alphabetical order. If you assign sequence numbers, the list will appear on the menu in sequence number order. **NOTE: Underlined column headings throughout *e*UMB Financials have similar sorting powers.** Re-sort the Favorites list alphabetically by clicking the ***Favorite** link. 
18.	Save your change. Click the **Save** button. 
19.	You can also delete Favorites you no longer need. To delete the Favorite titled 'Create Journal Entries', click the **Delete** button. 
20.	The system confirms that you <u>do</u> intend to delete a Favorite. (You always have the option to add it back again should you need it.) Click the **OK** button. 
21.	Be certain to click the **Save** button after making any changes to your list -- or your changes will be lost when you exit the page! Click the **Save** button. 
22.	You have now successfully set and edited Favorites within *e*UMB Financials. **End of Procedure.**

The *e*UMB Chartstring – Field by Field



GLBU	Project ID PCBU Act ID	Owner Dept	Program	Fund	Account	Tx. Dept	Amt
(UMB)	***(Community-based Child & Adol Nursing)***	***(Family & Community Health)***	***(Sponsored Research)***	***(Contracts & Grants)***	***(Purchase/Care of Animals)***	***(Family & Community Health)***	
PSUMB	***00523007*** ***00184*** ***00***	***08500000***	***152***	***181***	***3926***	***08500000***	$$$

Chartstring 101
A Quick Guide to Get You Started

Name	Quick Definition	Tips
PCBU	Campus-defined categories that primarily drive the grant billing process (EX: grant, DRIF, state, etc.)	Could be useful in RAVEN for defining categories of grants
Project Chartstring	PCBU + Project ID + Activity ID Bucket for collecting revenue, expense and budget (where applicable)	When you want to view RAVEN data for a specific Project, you only need to enter the Project ID.
Owner Department	The department responsible for financial management & budget for the Project	In RAVEN, remember that Owner Departments are arranged in "trees". Entering a department high on the tree will retrieve data for that department ID <u>and any of its sub-department IDs</u>.
Program	GAAP expense categories used to produce external reporting that is consistent across organizations in the higher education industry. Sometimes called the functional category (research, training, instruction, public service, etc.)	GAAP stands for "Generally Accepted Accounting Principles"
Fund	At a high level - source of funds (EX: Restricted, Unrestricted, Cost Sharing, Auxiliary, State, etc.)	Specifying Fund is an easy way to identify (for example) restricted vs. unrestricted sources of funds. At the detail level, it's an easy way to identify cost sharing expenses (for those who deal with Projects subject to cost sharing).
Account	For users who enter transactions Account is the revenue or expense category	Don't get "Account" confused with "Account Code" in eUMB HRMS. Account Code ties to Project in eUMB Financials. You may also hear Projects referred to as "accounts" – a holdover from the old system (FAS/FRS). This is a good term to clarify when talking with others!
Tx Department	Used to identify the department that entered the transaction ('Tx')	When you are using Projects "owned" by your department, Tx Department will be the same as Owner Department.
Amount	Not a chartfield, but almost always associated with chartfields	

Updated 10/19/09

*e*UMB Financials – Glossary of Terms

Account

A required field in *e*UMB Financials; defines business transactions that classify revenues, expenditures, assets, liabilities and related net changes in fund balances. Examples of *e*UMB **Account**s are:

- 3311 – In-State Travel (expense account)
- 0110 – Undergraduate In-State Tuition (revenue account)
- 7010 – Claim on Cash (balance sheet account)

View a list of all Accounts on the Financial Services web site at http://www.fincsvc.umaryland.edu/.

Activity ID

A required field in *e*UMB Financials for all Non-Appropriated Funds. **Activity ID** allows users to further breakdown Project ID into various pre-defined activities, e.g. Phases of a project. **Activity ID** for UMB will always be coded as "00".

Award

An **Award** may represent a single grant or a grant that has multiple projects rolling up to it. For instance, one Principal Investigator "A" – may have an award that is divided into five separate Projects that are controlled by Principal Investigators "B through F". In these cases PI "A" would be given Award level access in RAVEN (able to see all Projects in the Award), while PIs "B through F" would be given Project level access (able to see their individual Project(s) only.)

Chartfield

An independent accounting attribute in *e*UMB Financials that defines one component of a Chartstring. A Chartstring is used for recording accounting transactions in the system. An example of a UMB chartfield would be Fund.

Chartstring

A grouping of individual chartfields that in combination with each other represent a unique funding identifier where accounting/financial activity is recorded.

Dept ID

Represents a unique level within the organizational hierarchy that has authority and responsibility over budget and employees.

a.) **Owner Dept** is a required field in eUMB Financials. This field is used to designate the Dept ID of the department that has fiscal and operating authority for the chartstring.

b.) Tx (Transaction) Dept is a required field in *e*UMB Financials. In most cases, **Tx Dept** will equal Owner Dept. It will differ only when a department other than the Owner Dept initiates a transaction citing a chartstring from another department. For example, Dept A is purchasing a book using funds from a Grant owned by Dept B. In this scenario Dept A is the Tx Dept and Dept B is the Owner Dept.

Fund

A required field in *e*UMB Financials and represents the source of funding for that chartstring. "Roll up nodes" (e.g. 110, 115) cannot be used on transactions. Within Fund, 181 is used for all activity that flows through ORD. Code 194 is used for other funds that are restricted in their use such as donations, scholarships and the Common Trust Fund. View a list of all Funds on the Financial Services web site at http://www.fincsvc.umaryland.edu/**.**

GLBU General Ledger Business Unit is a required field in *e*UMB Financials that represents a single legal entity and has a complete set of books, business practices, and reporting requirements. **GLBU** at UMB is defined as a five character field: **PSUMB**. The system defaults to **PSUMB** on every transaction.

Owner Dept. A required field in *e*UMB Financials and represents an organizational unit or operational entity within an organization [structure] that has fiscal and operating authority and responsibility over budget and employees. All UMB faculty and staff personnel are either appointed (faculty) or assigned (staff) to **Owner Departments** for administrative management purposes. An example of a UMB **Owner Department** would be the Department of Pathology (SOM). View a list of all Owner or Tx (Transaction) Departments on the Financial Services web site at http://www.fincsvc.umaryland.edu/ (see Department Tree Structure).

PCBU Project Costing Business Unit (**PCBU**) is a required field in eUMB Financials for all Non-State Appropriated Funds. **PCBU** segregates **Project IDs** into various campus-defined categories of projects. The UMB numbering convention for PCBU provides users with some 'site logic' as to the type of project, grant or other non state appropriated fund. For example, all Federal Standard Grants & Contracts will have a specific PCBU value equal to 00184; all Revolving Funds will have a PCBU value of 00135. View a list of all PCBUs on the Financial Services web site at http://www.fincsvc.umaryland.edu/.

Program A required field in *e*UMB Financials and is defined as an ongoing, specific, regular activity or event that may cross funds, departments and sources of funds--the traditional GAAP (Generally Accepted Accounting Principles) expense categories, State of Maryland budgeted expense classifications, Alignment of Activities Categories and/or F&A Proposal Expense Pools. The **Program** code will allow UMB to classify accounting data in accordance with industry-wide standards to facilitate external reporting. Examples of **Program** codes are Instruction – General, Sponsored Research, and Sponsored Training. View a list of all Programs on the Financial Services web site at http://www.fincsvc.umaryland.edu/.

Project ID A required field in *e*UMB Financials. **Project ID** tracks financial activity (revenue, expense) for a specific purpose. Project IDs set up after March 1, 2006 are next-numbered and do not provide users with any 'site logic'.

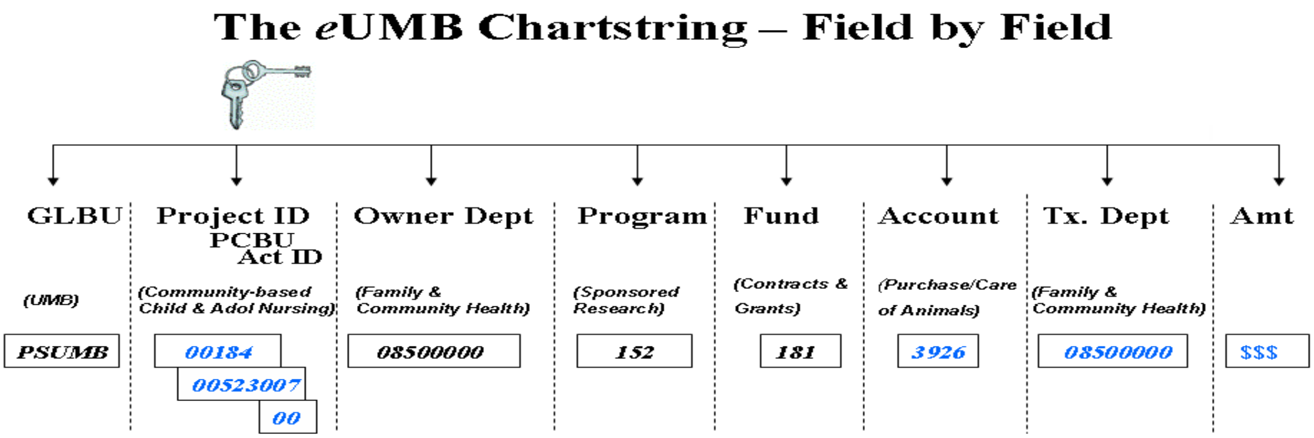
Trees Information in *e*UMB Financials adheres to a "tree" structure. This is a way to represent data in a hierarchical structure so that information can roll up and be summarized into "nodes". An example of this is the Supplies and Materials account 3900. There are 21 different types of supplies and materials that can be summarized into account 3000, the roll-up node for operating expenses.

Tx Dept. A required field in *e*UMB Financials. The **Tx Dept** (Transaction Department) code that users must enter on accounting transactions references the organizational unit (Department) who *originates* the transaction with permission to access the source of funds (**Owner Dept**) for operational reasons. For example, the UMB Telecommunications Dept charges other departments for phone usage on a monthly basis. The **Tx Dept** code referenced on the transaction would be the Department Code for the Telecommunications Department, who may be charging *your* Dept/Project ID. In this scenario *you* would be the **Owner Department**. View a list of all Owner or Tx (Transaction) Departments on the Financial Services web site at http://www.fincsvc.umaryland.edu/ (see Department Tree Structure).

Workflow An automatic electronic routing of work within the system from the individual who initiates it to the individual/department who must act on it next. For example, a requisition entered by a *Requisitioner* (once it passes system edits) is transmitted by **workflow** to the *Department Requisition Approver*.

Worklist An electronic list of items awaiting review/action. For example, in the **Workflow** example above, the Requisition, having been moved by workflow, would appear in the **Worklist** of the Department Requisition Approver (or in a common Worklist shared by several Approvers).

Chart of Accounts Overview (Rev 06/07)



1.	This graphic depicts a sample **Chartstring** from the *e*UMB Financials/HRMS system. The values shown in **blue** are entered by the end-user; the others are auto-populated by the system based on the values entered. In the frames that follow we will discuss how such a Chartstring is built.
2.	The **GLBU** (General Ledger Business Unit) "PSUMB" is a system default. Users do not have to enter this when building a chartstring, but it is always part of the chartstring nonetheless.
3.	**PCBU, Project ID** and **Activity ID** are the keys to the rest of the chartstring. You enter these values, and based on these the system will populate *Owner Department, Program* and *Fund*.
4.	**Owner Dept --** the department that "owns" the Project ID (the *owner* of the Grant or etc.)Each Project ID has only one **Owner Dept.** This one-to-one relationship enables the system to populate this chartfield once the PCBU and Project ID have been entered.
5.	**Program:** -- Reporting requirement of Academic institutions -- Defines or categorizes financial activity, Revenue & Expenses based on GAAP (Generally Accepted Accounting Principles) -- Important for Budget & Financial Reporting -- Facilitates determination of % of Indirect Expenses included in Federally-funded contracts and grants
6.	**Fund** represents the *source* of funds -- *e.g.*, Tuition & Fees, State-appropriated, Endowment, Auxiliary Enterprise.

7.	**Account** *categorizes* the expenditure, or revenue--*e.g.*, IT purchase, office supplies, lab fees, etc. (This is what "subcode" did in FAS.)
8.	**Tx. Dept = Transaction Department:** the department that is actually doing the transaction (Journal Entry, Requisition, ProCard Reallocation, etc.) in *e*UMB Financials. Often this is the same as the **Owner Department**, but sometimes it is different--as when one department (the Tx Dept) does a journal entry transferring money from another department (the Owner Dept) to their own coffers.
9.	**Amt. (Amount)** = the Transaction amount.
10.	In summary, here's how you build a Chartstring in a transaction: 1. The **G**eneral **L**edger **B**usiness **U**nit defaults in. 2. Click on the **Project ID** link; enter the **PCBU** and **Project ID**. (**Activity ID** always = "00," so it doesn't matter if you enter it.) 3. *e*UMB will auto-populate **Owner Dept**., **Program** and **Fund**. 4. Enter the **Account** and the **Tx Dept**. 5. You can look up the value for any field using the Look-up icon.
11.	In the frames that follow we will step through an example of entering a chartstring in the course of doing a Journal Entry. **In this example the CITS department is using DRIF money to make an IT purchase.**
12.	Click the **Projects** link. (None)
13.	Click the **Look up** icon for the **Project Business Unit** field.
14.	From the Search Results displayed we are choosing a DRIF as our project type (PCBU). Click on **00125**. 00125 CF-DRIF
15.	Click the **Look up** icon for the **Project** field.
16.	This will allow us to specify *which* DRIF. Select **00100649**. 00100649 CITS DRIF REVENUE
17.	These are the only two chartfields we need to enter at this point, since **Activity ID** will automatically default to "00." Click the **OK** button. OK
18.	Now we need to *categorize* our expenditure by selecting the appropriate **Account**. Click the **Look up** icon for the **Acct** field.

19.	Since there are more results than can be displayed, we need to narrow our search. We are looking for an **Account** with "IT" within its description. Click the **Description** drop-down arrow. 
20.	Select **contains**. 
21.	Enter the desired information into the **Description** field. Enter a valid value e.g. "**IT**".
22.	Click the **Look Up** button. 
23.	Select **Acct 4290, IT Purchases**.
24.	Now we need to define who (which department) is *creating* the transaction.
25.	In this case we are charging our own department's project, so the **Tx Dept** is the same as the **Owner Dept**.
26.	**Amount** and some other information would have to be entered at this point to complete an actual Journal Entry...but that is subject matter for the Journal Entry class!
27.	You have successfully completed the *e*UMB Chart of Accounts Overview. **End of Procedure.**

SAMPLE

eUMB-USER: 003454
Report ID: UMRFN312

University of Maryland, Baltimore
PROJECTS BY DEPARTMENT REPORT
Dept : Dept ID - Department Name

FNPROD: 345501
Page No. 1
Run Date 10/16/2007
Run Time 14:36:05

Owner Deptid	Fund	Prog	PCBU	Project	Project Name	Start Date	End Date	Proj Status	PI Name
Dept ID	116	101	00115	00110301	Project Name A	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	125	157	00125	00130749	Project Name B	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	135	552	00135	00390125	Project Name C	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	135	158	00135	00390126	Project Name D	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	118	102	00135	00395012	Project Name E	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	194	158	00196	00443023	Project Name F	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	194	551	00198	00444101	Project Name G	2005-07-01	2007-06-30	Open	PI Name (as assigned in eUMB Financials)

Project Count: 7 for Dept: Dept ID

SAMPLE: Project By Department Report

From *e*UMB Financials: General Ledger > General Reports > UMB Project By Department Report
Can be printed as is or downloaded to Excel

The UMB Project By Department Report lists ALL chartstrings associated with the Owner Department specified as you run the report. Use this report to view any chartstring "owned" by your department – **including newly established grants**.

The step-by-step instructions below will guide you through running and printing a paper copy of the report (steps 1–22) OR through running and downloading an electronic copy of the report to Microsoft Excel (steps 23–51).

A sample of the report is displayed at the end of this handout.

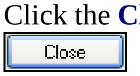
NEW as of 02/20/08: The downloadable (.txt) version of the UMB Project By Department Report contains both the department ID and a department description. This addition will be useful when downloading data for a department made up of more than one department ID. The addition of a department description will ease reading, sorting and filtering data in Excel. It will be especially useful to those who review downloaded data using Excel Pivot Tables.

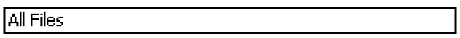
Displaying Chartstrings: The UMB Project By Department Report

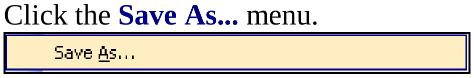
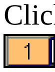
1.	Begin by navigating to the **UMB Project By Department Report** on the **General Ledger** menu in *e*UMB Financials. Click the **General Ledger** link. ▷ General Ledger
2.	For easier viewing, you may want to maximize your Internet Explorer window. Continue navigating to the **UMB Project By Department Report**. Click the **General Reports** link. ▷ General Reports
3.	Click the **UMB Project by Department Rpt** link. UMB Project by Deptartment Rpt
4.	A **Run Control ID** is required to run a report in *e*UMB Financials. The system uses **Run Control IDs** to track your report request through all stages of its creation. The following statements are true in *e*UMB Financials: - **Run Control IDs** can be used to run any report within eUMB Financials. - They can be re-used. You do not need to create a new Run Control ID each time you run a report. - A Run Control ID manages one report request at a time. - To run more than one report at the same time, create more than one Run Control ID. - Run Control IDs cannot be deleted.

5.	If you haven't set up any Run Control IDs in *e*UMB Financials, you will need to **Add a New Value**. (Otherwise, you can click the Search button on **Find an Existing Value** tab, then select from the list that's returned.) Click the **Add a New Value** tab. Add a New Value
6.	**Run Control ID** names can contain uppercase, lowercase or mixed characters. They cannot contain spaces. Insert an underscore if you wish to separate words. Name your **Run Control ID**. Enter the desired information into the **Run Control ID** field. Enter a valid value e.g. "**project_by_dept**".
7.	Click the **Add** button. Add
8.	The **UMB Project By Department Report** can retrieve by... - a single Owner Department ID (enter ID in **Department** field) - a group of related departments (enter highest level ID in **Department** field) This report will not retrieve data without a Department ID in the **Department** field. In this example we will run the report for a group of related departments by entering a high level Department ID. You could also use the **Lookup** button to search for the Department ID. The Lookup button is located to the right of the **Project** field. Enter the desired information into the **Department** field. Enter a valid value e.g. "**10417000**".
9.	Click the **Run** button. Run
10.	Review the **Process List** on the **Process Scheduler Request** page: - a check should appear in the **Select** checkbox - the name of the report should appear under **Description** - **Type** and **Format** should remain 'Web' and 'PDF' - all other settings should remain unchanged Click the **OK** button. OK
11.	Note that a **Process Instance number** (boxed in blue) now appears beneath the **Run** button. This is your indication that you have successfully submitted your report. Make note of the **Process Instance number**. You will use the **Process Instance number** later to locate the report you wish to view.

12.	Both **Report Manager** and **Process Monitor** pages provide the ability to... - monitor report progress/status - view report results - email report results - print report results - save a copy of report results In this example, we will use **Process Monitor**. You could also follow similar steps to use **Report Manager**.
13.	Click the **Process Monitor** link. Process Monitor
14.	You may wish to collapse the menu to give yourself more viewing space. Click the **Collapse (Ctrl+Y)** button.
15.	Your User ID (your Employee or Affiliate ID) should appear in the **User ID** field. **Reports run previously are available online for up to 98 days** after the run date. For direct access to reports run at another time, use the following menu path: **PeopleTools > Process Scheduler > Process Monitor**.
16.	The **UMB Project By Department Report** usually takes a few minutes to run to success. It is possible to check the status of your report by clicking the **Refresh** button periodically and viewing the **Run Status** and **Distribution Status** columns. This report has not finished running yet. Completed reports will show **Run Status = Success** and **Distribution Status = Posted**. Refresh the page for a status update. Click the **Refresh** button. Refresh
17.	The report has finished running. When **Run Status = Success** and **Distribution Status = Posted**, you will be able to view the report. View details on the report. NOTE: If you have submitted multiple reports, use the **Process Instance number** (boxed in green) to identify the report you wish to view. Click the **Details** link. Details
18.	Click the **View Log/Trace** link. View Log/Trace
19.	The **UMB Project By Department Report** provides both viewing and downloading options (boxed in blue). We will view results first, then download and import results into Excel. Click the **.PDF** link. umrfn312_110798.PDF

20.	Report results are displayed in a new window. Maximize the window for easiest viewing. **Results represent <u>all</u> of the requested department's projects as recorded in *e*UMB Financials.**
21.	To increase or decrease display size, use the zoom percent (boxed in green above). Action buttons for the following additional options are boxed in blue above: - Save a Copy - Print - Email - Search The Help menu located at the top of the page provides specific directions for using each of these features.
22.	Report results for **UMB Project By Department Report** can also be downloaded and imported into Microsoft Excel. The next series of frames will detail the steps to download and import results into Excel. NOTE: You can download results successfully without viewing the .PDF version of the report first. However, to save time you may wish to review results before going through the steps required to download to Excel. Close the .PDF version of the report. Click the **Close** button. 
23.	The .txt link is used for downloading data to be imported into Excel. Right-click the **dept_project.txt** link. 
24.	Click the **SaveTarget As...** menu. 
25.	The **File Download** and **Save As** dialog boxes open. Name the file using the **File name** field. Enter the desired information into the field. Enter a valid value e.g. "**dept_project_110706**".
26.	Click the **Save** button. 
27.	Next we will import the report results into Excel. Close the **Download complete** dialog box. Click the **Close** button. 
28.	Minimize the *e*UMB Financials window. Click the **Minimize** button. 

29.	Launch Microsoft Excel. Click the **start** button.
30.	Click the **Microsoft Office Excel 2003** menu. 
31.	Open the downloaded text (.txt) file containing the report results. Click the **File** menu. 
32.	Click the **Open...** menu.
33.	Search for the text file containing downloaded results. Click the button to the right of the **Files of type** field. 
34.	Expand the search to all file types, including text (.txt) files. Click the **All Files** list item. 
35.	Open the text file we saved earlier: **dept_project_110706.txt**. In this example, we will double click on the file name to open the file. (Single clicking the file name, then clicking the Open button will also work in Excel.) Double-click the desired entry in the list. 
36.	The **Text Import Wizard** opens. For this report, we need only 2 of the 3 steps in the wizard to make selections that will accurately import the text file into Microsoft Excel. (Other reports may require all 3 steps.) In **Text Import Wizard - Step 1**, confirm the following default selections: - Delimited is the file type selected (boxed in blue) - The saved location of the text file you are importing appears next to "Preview of file..." (boxed in blue) Click the **Next** button. 
37.	In **Text Import Wizard - Step 2**, you will... - change the **Delimiter** from **Tab** to **Other** - specify the **Other** delimiter symbol - finish the import Begin by unchecking the **Tab** checkbox. Click the **Tab checkbox** option. 

38.	Click the **Other checkbox** option. 
39.	Enter the **Other** delimiter. Use the "pipe" delimiter, a symbol that looks like a vertical line: |. On PC keyboards it is usually located on a key just above the right **Enter** key. Enter the desired information into the **Other** field. Enter a valid value e.g. "|".
40.	Notice that the text displayed in **Data preview** is now lined up in columns that are separated by a continuous vertical line. Click the **Finish** button. 
41.	You have successfully imported the report results into an Excel worksheet! Name and save the Excel worksheet. Click the **File** menu. 
42.	Click the **Save As...** menu. 
43.	Save the file as an Excel worksheet. Display the **Save as type** options. Click the button to the right of the **Save as type** field. 
44.	You may need to scroll to the top of the dropdown list to see the Microsoft Excel option. Click the **Microsoft Excel Workbook** list item. 
45.	Save the new Excel worksheet containing report results. Click the **Save** button. 
46.	You have successfully imported your text file into Microsoft Excel and saved your new worksheet. We will finish with two formatting steps that will make it easier to work with your data in this Excel worksheet: - Format all column headers (titles) if you will need to use the **AutoFilter**, **Data Sort** or **PivotTable** features on Excel's Data menu. - Adjust all column widths to display all characters
47.	Select the row containing the column headers (titles) - Row 1. Click the **Row 1** cell. 

48.	Bold the column headers (titles). Applying a format to the header titles (Row 1) will make it possible to use **AutoFilter**, **Data Sort** or **PivotTable** features with this data. Click the **Bold** button. 
49.	All column headers (titles) are now bold. Next, re-format column widths so that all characters are visible. Select the entire worksheet by clicking the blank cell directly above the Row border titled '**1**'. Click the **blank** cell. 
50.	With the worksheet selected, place your mouse pointer on top of the vertical line between columns A and B. When you are in the right spot, your mouse pointer will display a double- pointed arrow pointing left and right. Hold the mouse steady. Double-click the **cell margin** cell. 
51.	De-select the worksheet by clicking anywhere in the data area (not on the bolded headers). Save the formatted worksheet. Click the **Save** button.
52.	You have successfully run, viewed and downloaded results from the **UMB Project By Department Report**. Questions on report results should be directed to: - **Restricted Funds** for **Grants and Contracts** - **Financial Services Quality Assurance** for **all other sources of funds** **End of Procedure.**

SAMPLE

eUMB-USER: 003454
Report ID: UMRFN312

University of Maryland, Baltimore
PROJECTS BY DEPARTMENT REPORT
Dept : Dept ID - Department Name

FNPROD: 345501
Page No. 1
Run Date 10/16/2007
Run Time 14:36:05

Owner Deptid	Fund	Prog	PCBU	Project	Project Name	Start Date	End Date	Proj Status	PI Name
Dept ID	116	101	00115	00110301	Project Name A	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	125	157	00125	00130749	Project Name B	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	135	552	00135	00390125	Project Name C	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	135	158	00135	00390126	Project Name D	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	118	102	00135	00395012	Project Name E	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	194	158	00196	00443023	Project Name F	2005-07-01	2006-06-30	Open	PI Name (as assigned in eUMB Financials)
Dept ID	194	551	00198	00444101	Project Name G	2005-07-01	2007-06-30	Open	PI Name (as assigned in eUMB Financials)

Project Count: 7 for Dept: Dept ID

SAMPLE: Project By Department Report

From eUMB Financials: General Ledger > General Reports > UMB Project By Department Report
Can be printed as is or downloaded to Excel

Finding Help For *e*UMB Financials

The Campus Portal Login Page: https://myumb.umaryland.edu

The UPK Player
You can access the UPK simulations that are used in *e*UMB Financials classes (either in "PC" or "Mac" format) by clicking on the appropriate link under "Practice Using Course Files Online" on the eUMB Financials Training Information Page (see URL below)**,** or directly at: **https://devfinweb.umaryland.edu/PSOL/htmldoc/upk/sample/toc.html** (PC version only). The **Help** function in *e*UMB Financials also leads you to the UPK, but specifically in the "Do It!"(coaching) mode.

Other Helpful Web Sites
The *e*UMB Financials Training Information Page, **http://www.umaryland.edu/eumb/training/training_info_page,** contains links to the Training Enrollment web site, the UPK Player, Classroom Directions, Roles and Required Training chart, all course materials, and more.
The *e*UMB Project web site at **http://www.umaryland.edu/eumb** provides status reports on the *e*UMB Financials Project, updates on "Known Issues" (problems that you and other users might be having), PowerPoint presentations done for various campus groups, etc.

Power Users
"Power Users" are people from across campus who were nominated by key managers for their abilities and interest in helping others around them. Many of them helped with testing and training on the system prior to and/or during the roll-out period in early 2006. They are the go-to people for quick answers to day-to-day user problems—and/or a referral to technical and functional experts. There are most likely several Power Users in your division, department or unit. Further information about Power Users, and some presentations, etc., that were done specifically for them, can be found at the *e*UMB Project web site (see URL above).

Central Offices
The folks at the Financial Services and Procurement Central Offices are the real "owners" of the *e*UMB Financials system, and the ultimate authorities on the business practices connected with it. Their special web site for *e*UMB Financials is: **http://www.fincsvc.umaryland.edu/ps/index.cfm.** If you have questions about chartfield values, department tree structure, or other concepts and terms that are new with *e*UMB Financials, try looking here first. If you need to contact the Central Offices please call the following phone numbers:

- Accounts Payable 6-2931
- Cash Receipts 6-2929
- Corporate Purchasing Card 6-8501/6-7776
- HR, Payroll, Commitment Accounting 6-8581
- Procurement 6-8501
- Quality Assurance 6-6554
- Restricted Funds 6-0487
- Travel / Working Fund 6-7295
- RAVEN 6-2509 or 6-4830

The Help Desk
The Assistance and Service Center (ASC) Help Desk personnel are available Monday through Friday from 8:00 to 5:00 at 410-706-4357 (from campus, just dial 6-HELP), or 24x7 at **http://www.umaryland.edu/helpdesk/** to answer your questions about *e*UMB or any other Enterprise (campus-wide) application. They will be available to address clearly technical, password, and system access issues. They will also transfer functional questions to the appropriate central office personnel.

Forms
Please refer to the eUMB Project page for the forms you require: **http://www.umaryland.edu/eumb/** . This page contains links to forms related to Financial Services, Budget Office, EHS, Health Sciences and Human Services Library, Human Resource Services, ORD, Procurement, and User Security Access Forms. Additional forms from the campus are added as they are provided.

RAVEN/eUMB Access Request
In order to gain access to RAVEN you will need to complete the RAVEN Access Form found at the Financial Services Forms web page **http://www.fincsvc.umaryland.edu/forms.cfm**.

The *e*UMB Project Team
These individuals are experts on the technical workings of the *e*UMB Finanicals system as the Central Office personnel are on its business functions. If you need an answer to a technical question that is beyond the knowledge level of your local Power User or Help Desk Service Rep, the Help Desk may refer it to a member of the Project Team, and track your inquiry for you.

Financial Systems
The Financial Systems Group participated in the writing of the course materials and are conducting the classes on all aspects of *e*UMB Financials. Their job is training and supporting system end-users like you! For descriptions of presentations and classes offered and to access online training enrollment, go to **http://cf.umaryland.edu/cits_training/** and select Course Type e*UMB-Financials*.

ASC Ticket # ____________

University of Maryland Baltimore
Center for Information Technology Services
*e*UMB Financials User Authorization Form and System Access Agreement
Department - Employee of UMB

- ❑ New - User does not currently have a User ID for the *e*UMB system – add user
- ❑ Change - User currently has a User ID for the *e*UMB system – change access and/or role
- ❑ Delete - Completely remove User's access to the *e*UMB system – delete user

User Information - Please type or print

User Name (Last, First, MI)		Date	School/Department
***e*UMB Employee ID**	**Campus Email Address**		**Campus Phone**

Department Roles

Role	Assign Role	Remove Role	Workflow Route Controls
Requester			
Requisitioner			
Dept Requisition Approver			
Receiver			
Pro Card Viewer			
Pro Card Reallocator			
Dept JE Initiator			
Dept Grant Viewer			
Dept Reporter	X		

Comments

Employing Unit (must be Department Chair or Unit Director) - I accept the terms of the Agreement defined on the second page of this form

Signature		Date	Phone
Print Name	**Title**	**Email Address**	

User Signature - I accept the terms of the Agreement defined on the second page of this form

Signature	Date

****Deliver signed forms to the Help Desk, Room 540 HS/HSL (601 W. Lombard Street, Baltimore, MD 21201)****

*e*UMB Financials System Access Agreement - Department - Employee of UMB

1. Definitions of terms in this Agreement:

- "CITS" – The UMB Center for Information Technology Services.
- "Employing Unit" - The UMB unit in a school or administrative department for which User performs job functions requiring access to the *e*UMB system.
- "*e*UMB System" - The data developed by and for UMB concerning its employees, whether in paper, digital, or other form, and the systems in which the data is entered and maintained.
- "UMB" – University of Maryland Baltimore.
- "User" – The undersigned UMB employee, who is being given access to the *e*UMB System.

2. The User, who works for UMB in the Employing Unit, has been assigned by the Employing Unit to carry out job functions of benefit to UMB which require that User have access to the *e*UMB System. UMB grants User access to the *e*UMB System for the limited purpose of carrying out User's employment responsibilities related to the UMB employees of the Employing Unit.

3. User and the Employing Unit agree that User will be required to attend and successfully complete all training required by UMB as a condition of initial and continued use of, and access to, the *e*UMB System.

4. User agrees to hold in confidence any passwords or access codes issued to User, or created by User, for access to the *e*UMB System.

5. User agrees to access and use personal information about UMB employees in the *e*UMB System only for legitimate job-related purposes, and agrees not to disclose personal information from the *e*UMB System to any person who is not: (a) a supervisor of the subject of the personal information; (b) the subject of the personal information; or (c) a member of the staff of CITS, the UMB Human Resources Office, or a UMB attorney.

6. User agrees to report promptly to User's supervisor and to CITS any request for personal information from the *e*UMB System made by any person not listed in 5 above. User will not respond to such requests and will promptly refer them to the CITS for response or other appropriate action. This requirement applies to both informal and formal requests, including requests under the Maryland Public Information laws.

7. User acknowledges that the information contained in UMB records, including but not limited to student, personnel, payroll, and financial information, is confidential by law and/or UMB policy. User acknowledges that *e*UMB training has included education about the provisions of the Annotated Code of Maryland, Criminal Law Article, sections 7-302 and 8-606, relating to illegal access to, and the unauthorized manipulation of data using, computer resources; State laws concerning privacy of personal information (State Government Article, Annotated Code of Maryland, sections 10-616 and 10-617); and federal laws establishing privacy rights of students (Federal Family Educational Rights and Privacy Act of 1974, also known as the Buckley Amendment). User is aware that violation of applicable privacy laws and laws concerning use of computer resources may result in fines or imprisonment, as well as disciplinary action up to and including termination of employment.

8. User agrees not to use UMB computing resources or UMB data in the *e*UMB system for personal profit of User or any other person.

9. User and the Employing Unit agree that CITS may monitor User's activities involving the *e*UMB System for compliance with UMB policy and legal requirements. If such monitoring reveals possible failure to follow UMB policy, or criminal activity, CITS may provide relevant information to User's Employing Unit, appropriate UMB officials, and/or law enforcement officials.

10. User and the Employing Unit agree to provide to UMB or UMB auditors, upon UMB's request, any information in their possession related to User's access to and use of the *e*UMB System.

11. Employing Unit will discipline and/or discharge User for violation of this Agreement or the policies established by UMB concerning access to and use of the *e*UMB System. Employing Unit agrees to report promptly to CITS any violations of this Agreement or UMB policies concerning access to and use of the *e*UMB System. User and the Employing Unit agree that User's continued employment by UMB may be subject to compliance with this Agreement and *e*UMB policies.

THIS SECTION IS FOR SECURITY ADMINISTRATOR USE ONLY	User ID:
Verify: ❑ System Access Agreement	**Verify Training:** ❑ BP Orientation ❑ COA Orientation ❑ Intro to *e*UMB Financials ❑ Receiving Goods and Services ❑ Working w/Requisitions ❑ Pro Card Reallocation ❑ Working w/Journal Entries ❑ Intro to RAVEN

ASC Ticket # ____________

University of Maryland Baltimore
Center for Information Technology Services
*e*UMB Financials User Authorization Form and System Access Agreement
Department - Affiliate of UMB

- ❑ New - User does not currently have a User ID for the *e*UMB system – add user
- ❑ Change - User currently has a User ID for the *e*UMB system – change access and/or role
- ❑ Delete - Completely remove User's access to the *e*UMB system – delete user

User Information - Please type or print

User Name (Last, First, MI)		Date	School/Department
***e*UMB Affiliate ID**	**Campus Email Address**		**Campus Phone**

Department Roles

Role	Assign Role	Remove Role	Workflow Route Controls
Requester			
Requisitioner			
Dept Requisition Approver			
Receiver			
Pro Card Viewer			
Pro Card Reallocator			
Dept JE Initiator			
Dept Grant Viewer			
Dept Reporter	X		

Comments

User's Employer (must be signed by authorized officer of Employer) - I accept the terms of the Agreement defined on the second page of this form

Signature		Date	Phone
Print Name	**Title**		**Email Address**

User Signature - I accept the terms of the Agreement defined on the second page of this form

Signature	Date

****Deliver signed forms to the Help Desk, Room 540 HS/HSL (601 W. Lombard Street, Baltimore, MD 21201)****

*e*UMB Financials System Access Agreement - Department - Affiliate of UMB

1. Definitions of terms in this Agreement:

- "CITS" – The UMB Center for Information Technology Services.
- "Employer" – Entity that employs User and assigns User to perform job functions requiring *e*UMB access.
- " *e*UMB System" – The data developed by and for UMB concerning its employees, whether in paper, digital, or other form, and the systems in which the data is entered and maintained.
- "UMB" – University of Maryland Baltimore
- "User" – The undersigned person, who is not an employee of UMB, but who requires access to the *e*UMB system to carry out job functions of benefit to UMB.

2. User works for Employer and is not an employee of UMB or the State of Maryland. User has job responsibilities for the Employer which relate to State employees working at UMB. These responsibilities require that User have access to the *e*UMB System. Performance of these responsibilities will benefit UMB, which consents to User having these responsibilities, and grants User access to the *e*UMB System for the limited purpose of carrying out User's job functions related to UMB employees.

3. User and Employer agree that User will be required to attend and successfully complete all training required by UMB as a condition of initial and continued use of, and access to, the eUMB System.

4. User agrees to hold in confidence any passwords or access codes issued to User, or created by User, for access to the *e*UMB System.

5. User agrees to access and use personal information in the *e*UMB System only for legitimate job-related purposes, and agrees not to disclose personal information from the *e*UMB System to any person who is not: (a) a supervisor of the individual who is the subject of the personal information; (b) the subject of the personal information, (c) a member of the staff of the Human Resources office of UMB, the University of Maryland School of Medicine, or CITS, or (d) a UMB attorney.

6. User agrees to report promptly to User's supervisor and to CITS any request for personal information from the *e*UMB System made by any person not listed in 5 above. User will not respond to such requests and will promptly refer them to CITS for response or other appropriate action. This requirement applies both to informal and to formal requests, including requests under the Maryland Public Information laws.

7. User acknowledges that the information contained in UMB records, including but not limited to student, personnel, payroll, and financial information, is confidential by law and/or UMB policy. User acknowledges that *e*UMB training has included education about the provisions of the Annotated Code of Maryland, Criminal Law Article, sections 7-302 and 8-606, relating to illegal access to, and the unauthorized manipulation of data using, computer resources; State laws concerning privacy of personal information (State Government Article, Annotated Code of Maryland, sections 10-616 and 10-617); and federal laws establishing privacy rights of students (Federal Family Educational Rights and Privacy Act of 1974, also known as the Buckley Amendment). User is aware that violation of applicable privacy laws and laws concerning use of computer resources may result in fines or imprisonment, as well as disciplinary action up to and including termination of employment.

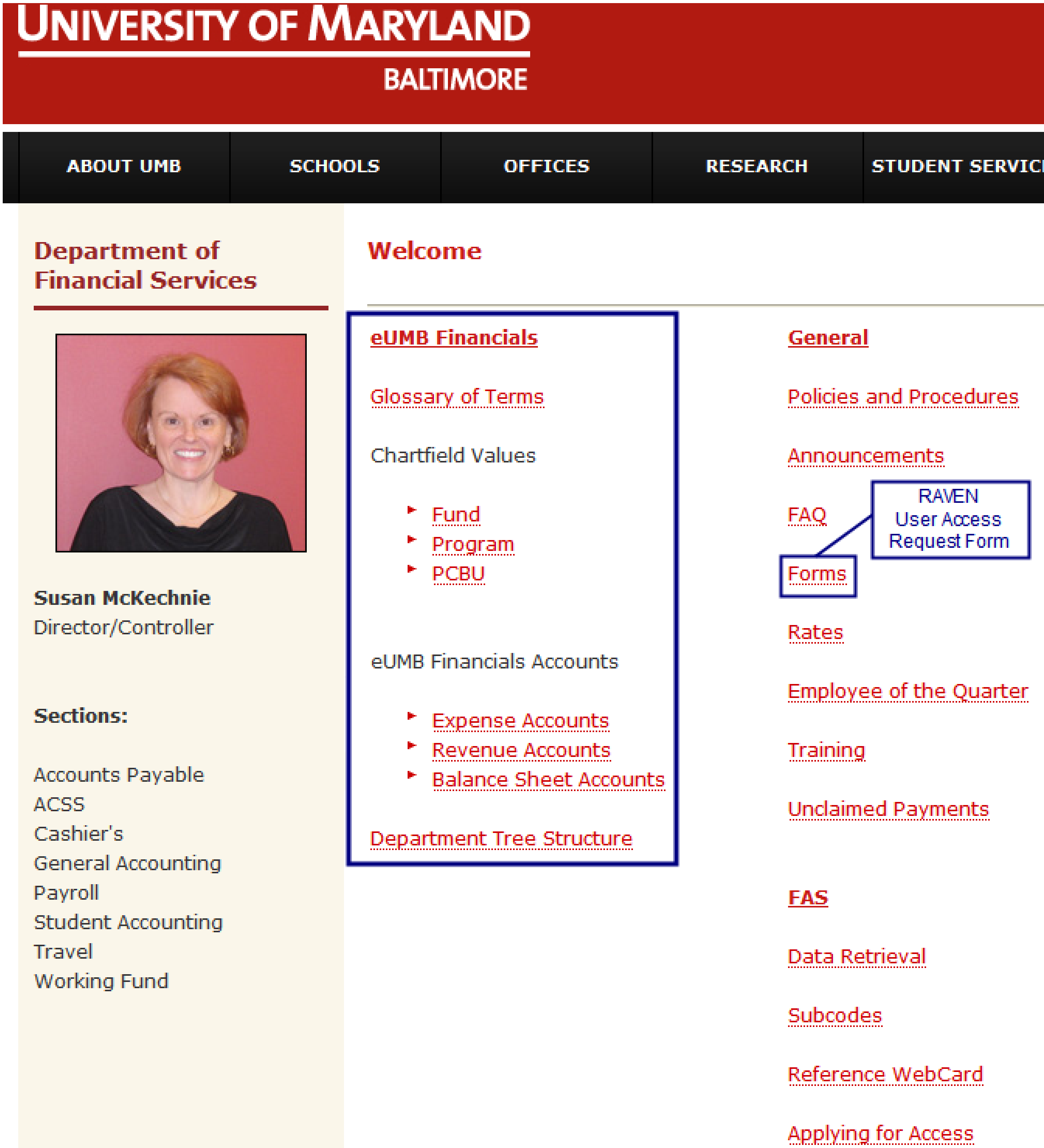
8. User agrees not to use the UMB computing resources or UMB data in the *e*UMB system for personal profit of User or any other person.

9. User and Employer agree that CITS may monitor User's activities involving the *e*UMB System for compliance with UMB policy and legal requirements. If such monitoring reveals possible failure to follow UMB policy, or criminal activity, CITS may provide relevant information to the Employer, to appropriate units of UMB, and/or to law enforcement officials.

10. User and Employer agree to provide to UMB or UMB auditors, upon UMB's request, any information in their possession related to User's access to and use of the *e*UMB System.

11. Employer will discipline and/or discharge User for violation of this Agreement or the policies established by UMB concerning access to and use of the eUMB System. Employer agrees to report promptly to CITS any violations of this Agreement or UMB policies concerning access to and use of the eUMB System. User acknowledges that continued employment by Employer may be subject to compliance with this Agreement and eUMB policies.

THIS SECTION IS FOR SECURITY ADMINISTRATOR USE ONLY		**User ID:**	**Data Permission List:**
Verify: ❑ System Access Agreement	**Verify Training:** ❑ BP Orientation ❑ COA Orientation ❑ Intro to *e*UMB Financials ❑ Receiving Goods and Services ❑ Working w/Requisitions ❑ Pro Card Reallocation ❑ Working w/Journal Entries ❑ Intro to RAVEN		



Financial Services Web Site:
http://www.finsvc.umaryland.edu

RAVEN ACCESS REQUEST

Access should be approved by your department head or their designee and include all of the information presented below. Upon their approval, have them forward the request to:

ASC Help Desk
Health Sciences & Human Services Library
601 W. Lombard Street LL06
Phone: 410-706-HELP (4357) Fax: 410-706-4191

- ❑ **New** - Create new profile
- ❑ **Change** - Change an existing profile
- ❑ **Delete** - Delete an existing profile

User Information		
User Name	**Date**	**School/Department**

Employee/Affiliate ID	**Campus Email Address**	**Campus Phone**

RAVEN Roles	**Assign Role**	**Remove Role**	**Description**
RAVEN COEUS Inquiry			Allows access to all COEUS Inquiry Pages.
RAVEN Financials Inquiry			Allows access to all pages in RAVEN Financials Inquiry for designated access.
RAVEN PCard Inquiry			Allows access to Pro Card pages for designated access.
RAVEN SPC Inquiry			Allows access to the Statement of Payroll Charges for designated access.

Comments

ACCESS TYPE	**Complete Access Type if you are requesting access to RAVEN Financials, PCard or SPC Inquiry. You must indicate Owner Department for each Project ID and/or Award ID.**		
Owner Department			
Project ID (1)		**Project ID Owner Dept (1)**	
Project ID (2)		**Project ID Owner Dept (2)**	
Project ID (3)		**Project ID Owner Dept (3)**	
Award ID		**Award ID Owner Dept**	

Employee Signature	**Date**	**Department Head or Designee Signature**
Financial Services Representative Signature RAVEN access has been established.		