

## Transitioning to our New Reporting System

*Welcome to the transition.* This week marks the July month close and preparations to implement the University's new Reporting System. Thanks to the phased nature of this implementation, we have time to get familiar with the new tool before we say a complete goodbye to the old one. For a review of what to expect, what you should look for, what to do to get ready, and what to think about for the future, read on...

### What to Expect: Overall Timing

We are implementing the new Reporting System in stages over the next few weeks – but the current tools (such as the Finance Reporting System) will remain available. During our phased-implementation, you will have access to both new and old reports, both emailed and printed versions. You will also have the ability to print reports in both systems.

System campus users will be the first to gain access to the new reporting tool and should expect a release email in the middle of next week (around August 16). The other campuses will be released, several days apart, over the course of the next few weeks, in the following order: Colorado Springs, Denver-Health Sciences Center, Boulder.

### What to Expect: Portal Report Access

The University's two portals – myCU and CUConnect – will present their new **Reports** pages as each campus is released over the next few weeks. While we encourage you to become familiar with the portal environment ahead of time, you'll definitely want to check it out once your reports are available. If you have a fiscal role, you will receive an email on the day that your reports become available. *In addition, we'll keep you informed through this newsletter.*

### What to Expect: Printed & Burst Reports

The designated reports will be burst (distributed) to the portals of employees with fiscal roles and will be available for review early next week. The usual printed reports will still be distributed. *The July reports from the Finance System were distributed on Monday, August 7, and you will receive printed August reports in early September. If you have a fiscal role, you will receive an email when reports from the new Reporting System are available in the portal.*

### What to Expect: Reporting Step-by-Step Guides

Step-by-Step Guides will be available on our web site when the first campus is released, early next week. If you like written documentation, you'll love these comprehensive instructions.

### Know Your Role

*Is your position assigned to a fiscal role?*

Next week, the initial round of email notifications and burst reports will be distributed to Program and Project Principals, Program and Project Managers, and SpeedType Fiscal Staff. You should know what to expect for yourself and the staff who report to you. If you have any questions about how to look up fiscal roles in the Finance System, contact the Finance & Procurement Help Desk at 303.315.2846. Questions about who should be in these roles and/or how to change role assignments should be directed to your campus controller/finance office.

### Getting Ready

*There's no time like the present to get ready for reporting.*

If you have been associated with a fiscal role and will receive *burst* (electronically delivered) financial reports...or if you will need to run financial reports in the Reporting System...you should make the following technical preparations:

#### EMAIL PREP:

If you should receive burst reports, they will be sent to you by [reporting.system@cusys.edu](mailto:reporting.system@cusys.edu). Your email and spam-blocking software will need to recognize this as a safe sender.

#### INTERNET BROWSER PREP:

A few things here... (1) You'll need access to a computer with Internet Explorer Version 6.0 and Adobe Acrobat Reader Version 6.0 or higher. (2) We recommend that you turn off the Internet password-save feature. (3) Be sure you understand pop-up blockers on the Internet: you'll need to turn them off for the Reporting System and portal web sites to work correctly. (4) If you will use the Reporting System to run reports in Excel, then you will need to add the Reporting System web site to your local intranet zone. (5) And last...do you know how to clear your machine cache?

#### PORTAL PREP:

Don't wait till the day your reports are delivered to check out your portal. All campus employees have access to the CU System portal, myCU (<https://my.cu.edu>). Boulder employees also have access to their own campus portal, CUConnect (<https://cuconnect.colorado.edu>).

#### HELP WHEN YOU NEED IT:

Useful contact information to keep handy includes the Finance and Procurement Help Desk, 303.315.2846, or email [PSCHelpDesk@cu.edu](mailto:PSCHelpDesk@cu.edu) (for questions about logging in to the portal or the Reporting System, running reports, and related issues). You should also know how to contact your local or campus IT support staff (for hardware/ software issues) and your campus finance/accounting office (for assistance interpreting your financial reports and for questions about fiscal roles).

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