Reporting System Moves on *(to UCDHSC)*

Denver/Health Sciences Center: it's your turn. Electronic reports have been burst to your campus.

Remember that in order to receive a burst report, you must have been assigned a fiscal role in the Finance System. You must have a valid email address in the campus IT directory. Furthermore, your employee ID number must be associated with your name and email address in that directory. *Otherwise:*

- *If you do not have a fiscal role in the Finance System,* you will not be designated to receive any burst reports. (Your campus controller's office can help you if this needs to be changed.)
- *If you do not have a valid email address in the campus IT directory,* you will not receive the email letting you know that the reports have been burst…and you may not be able to log in to the portal.
- *If your employee ID is not associated with your name in the IT directory,* you will be able to log in to the portal but you will not see any personal information. (Your campus IT office can help you with either of these last two issues.)

To get the details, read on…

Reporting: What's Next

Later this month we will have completed the first phase of the Reporting System implementation. This will include:

- The burst of reports to individuals with fiscal roles on all campuses.
- The revision of the "planets page," https://saturn.cusys.edu – offering a link to the new system and to the Reporting Step-by-Step Guides.
- The revision of the portals – providing a new *Tools and Other Resources* page with a link to the Step-by-Steps and other helpful contact information.

And speaking of Reporting Step-by-Step Guides…we'll have two new ones published shortly. The additions will cover the topics of how to print reports directly to Excel or PDF.

Also, check out the online Reporting System Training Presentation at www.cu.edu/controller/reportingproject.

Beyond Reporting: What's Happening?

Campus Forums Coming Soon

There's a lot going on in finance and procurement these days...and here's your chance to get all the updates.

Office of University Controller staff will present a series of campus forums at the end of this month to ensure that we're all on the same page.

You'll learn about a variety of topics, including:

- Expenditure Control;
- Standing Purchase Order updates;
- Reporting and Recognition, Sensitive Expenditures, and other new or revised Administrative Policy Statement (APS) and PSC Procedural Statement updates;
- Business Purpose Documentation; *and more.*

Look for a complete schedule of sessions and topics in the next **CONNECTIONS** newsletter.

Gift Fund Training Deadline Extended to December 1, 2006

As we all focus on improving communications at the University, the issue of complete and accurate email addresses is continually revisited. In the case of Gift Fund Management, the email issue has been a major factor in extending deadlines to complete training. *The final revised deadline to complete the required training is December 1, 2006.*

This month, information on the new training requirement is being resent to individuals having a fiscal role on a Fund 34 (Gift Fund) SpeedType. These include Org Principals, Org Managers, Program Principals, Program Managers, and in some cases, SpeedType Fiscal Staff. All designated individuals must complete Gift Fund Management training, whether in-person or online. (The online training is available as a PowerPoint presentation on the OUC web site, www.cu.edu/controller/.)

Are you required to take the training? You can verify who has been assigned a fiscal role on a Fund 34 SpeedType by looking in the Finance System: *General Ledger > ChartFields > SpeedTypes.* Identify your gift SpeedType, and select the *Add'l SpeedType Attributes* tab and the *Org/Program/Project Attributes* tab to get the names assigned to the fiscal roles.

Did you complete the training? If you're wondering if you completed the training, you can look up your training record in the HR System: *Develop Workforce > Administer Training > Inquire > Student Training Summary.*

What if you don't complete the required training? Your Gift Fund SpeedType will be inactivated.

New Gift Fund Form

Do you need to request a new Gift Fund (Fund 34) SpeedType – with or without a new CU Foundation account? If you do, then you will like the new, improved form used for these requests. Look for the revised Gift Fund (GF) form on the Finance Forms web site at www.cu.edu/forms.

Reminder on Gift Fund Transfers

The gift fund process automatically transfers CU Foundation funds to their corresponding (linked) University SpeedTypes. As long as the CU Foundation account has the cash, transfers are made essentially weekly…with no dollar thresholds.