New Portal for Kuali Financial Reports Quick Tips

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Revision Log

Version	Date Issued	Update information
V1.0	01-08-2020	First published version.

Brief Overview

A new portal has been developed by Administration and Finance for accessing administrative reports many of you rely on to do your work, including PHR reports. This document serves as a quick tip guide for navigating within the new portal.

The portal provides access to current KFS and PHR reports from a single site:

https://adminreports.umd.edu

It will also provide access to other administrative reports for VPAF systems in the future. Here are some of the great features the portal provides:

- easier navigation, with reports grouped by topics
- report descriptions that include a link to the report
- ability to tag reports as Favorites --- now you can quickly get to the reports you use all the time
- keyword search to find reports
- a Bulletin Board for announcements about report changes, system maintenance, etc.
- links to additional resources

We hope you find the portal's various features to be helpful.
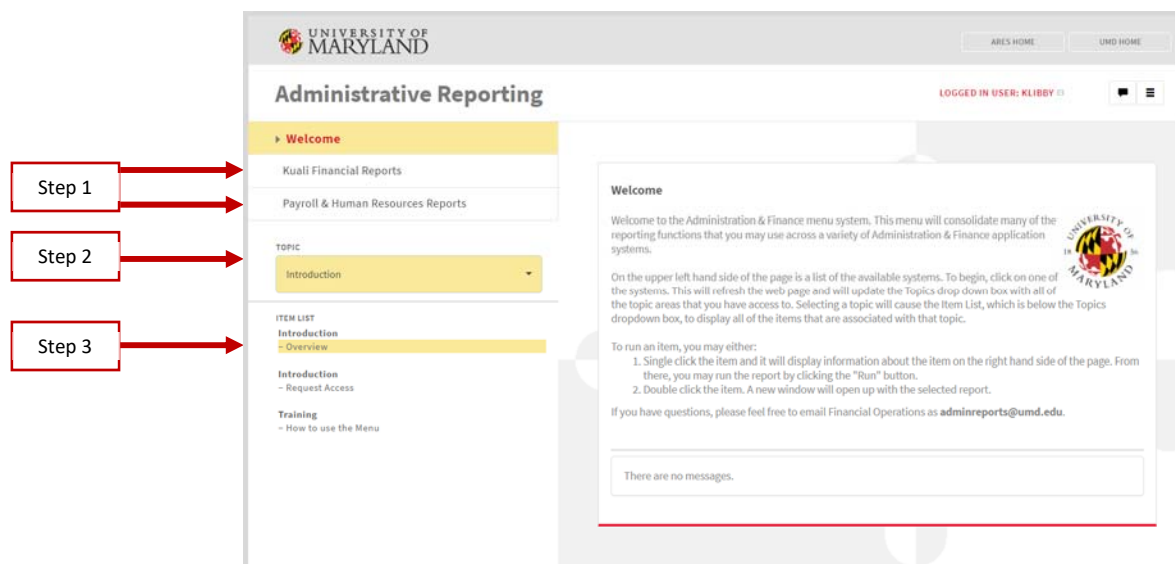
How to Access the System

The link to the Administrative Reporting portal is https://adminreports.umd.edu. **The UMD CAS Login is required to access the Portal.**

To navigate on the **Administrative Reporting** main menu page, follow the steps below:

Step 1: Select **Kuali Financial Reports** or **Payroll & Human Resources Reports**.
Step 2: Select a **Topic**.
Step 3: Select from the **Item List.**

How to Access the Bulletin Board

The **Bulletin Board** topic displays important information and announcements to users of financial reports.

To access the **Bulletin Board** follow the steps below:

1. On the **Administrative Reporting** main menu page, click on **Kuali Financial Reports**.
2. Click on the **Topic** drop-down menu.
3. Under **Kuali Financial Reports** click on **Bulletin Board**.
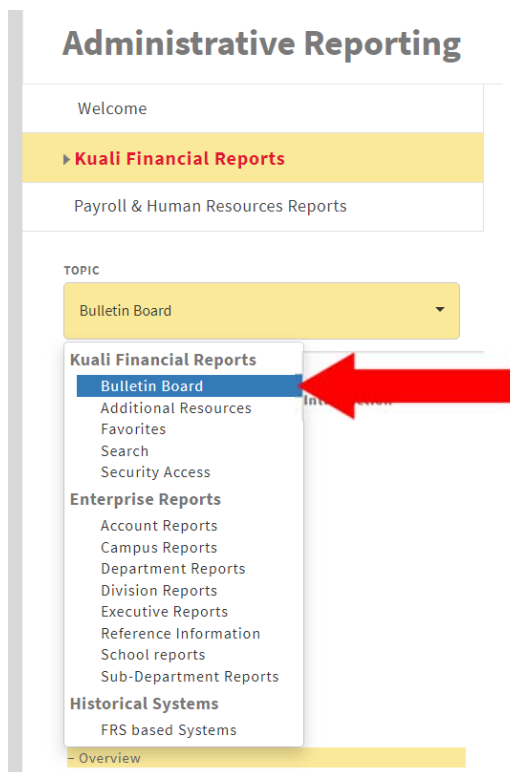
How to Use the Favorites Function

The <u>Favorites</u> are for reports that are frequently used. The <u>Favorites</u> function allows users to customize a report list. Users can set up as many favorites as needed.

For example, to set up **<u>KFS090: Account Overview</u>** report in **<u>Favorites</u>** follow the steps below:

1. On the **<u>Administrative Reporting</u>** main menu page, click on **<u>Kuali Financial Reports</u>**.
2. Click on the **<u>Topic</u>** drop-down menu.
3. Click on **<u>Account Reports</u>**.
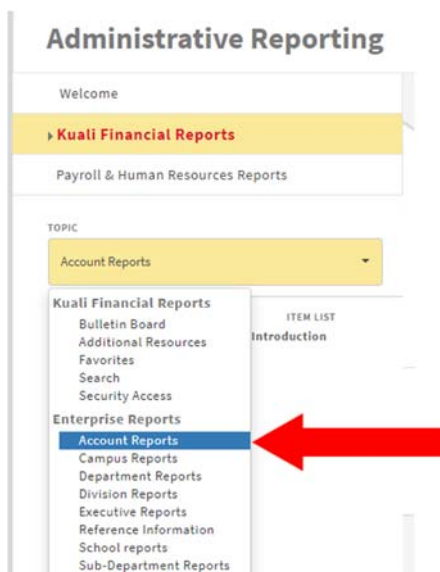
4. Under Financial Overview click on **<u>KFS090: Account Overview</u>**.
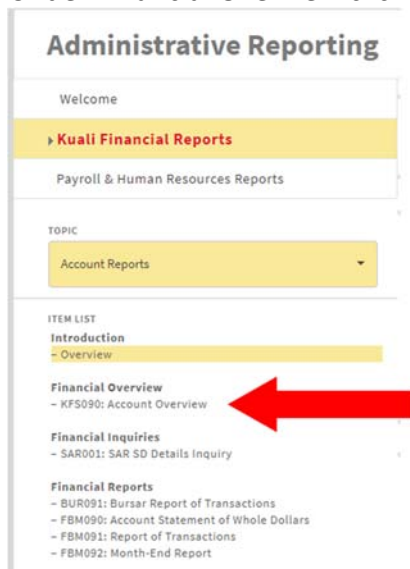
5. Check the **Add to favorites** box.
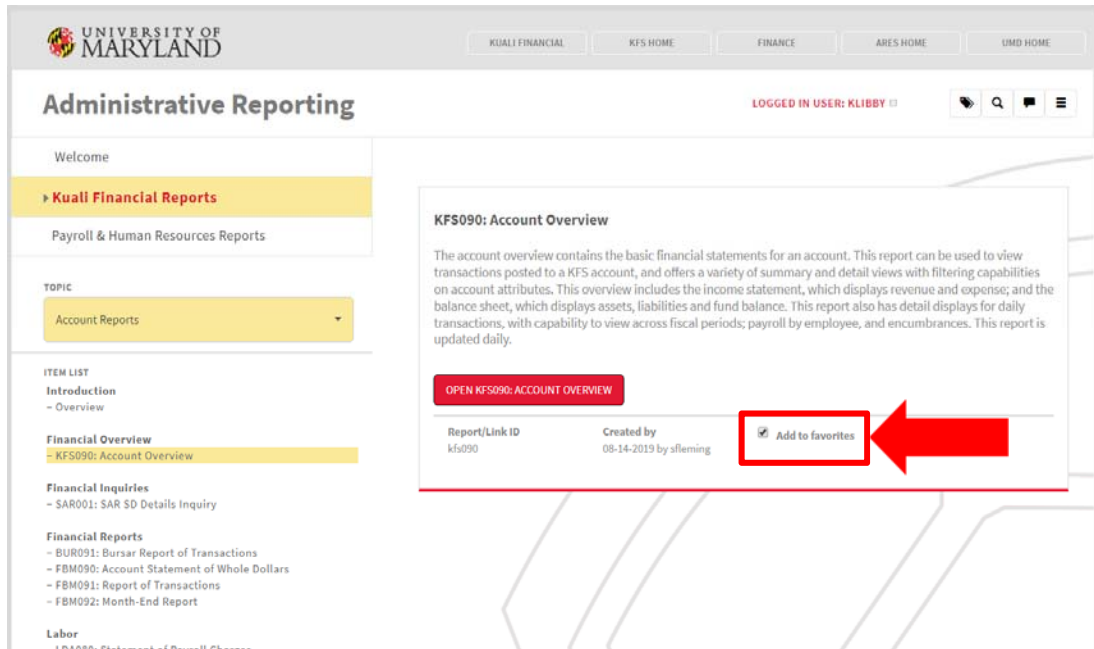
6. To view **Favorites**, click the **Favorites** icon in the far-right hand side of the **Administrative Reporting** menu. 🏷
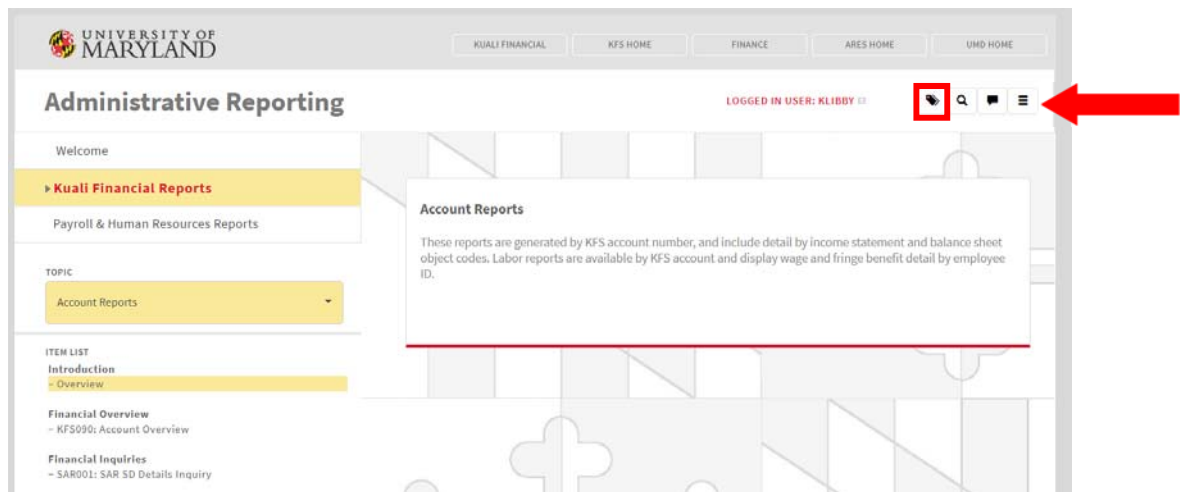
7. A running list of the reports marked as a favorite will be displayed. In this example, the **KFS090: Account Overview** is displayed as a favorite.

How to Use the Search Function

There are two locations to find the search function on the site.

Option 1:
1. On the **Administrative Reporting** main menu page, click on **Kuali Financial Reports**.
2. Click on the **Topic** drop-down menu.
3. Choose **Search** from the **Kuali Financial Reports** section on the drop-down menu.
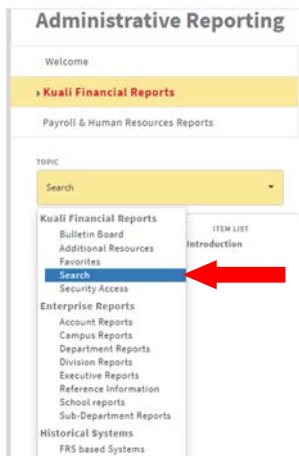
Option 2:
1. On the **Administrative Reporting** main menu page, click on the tool bar search icon.

Once the Search box, type in any word in the title of the requested report. For example, the report "KFS090: Account Overview" type in Account Overview and the link for the report will display.
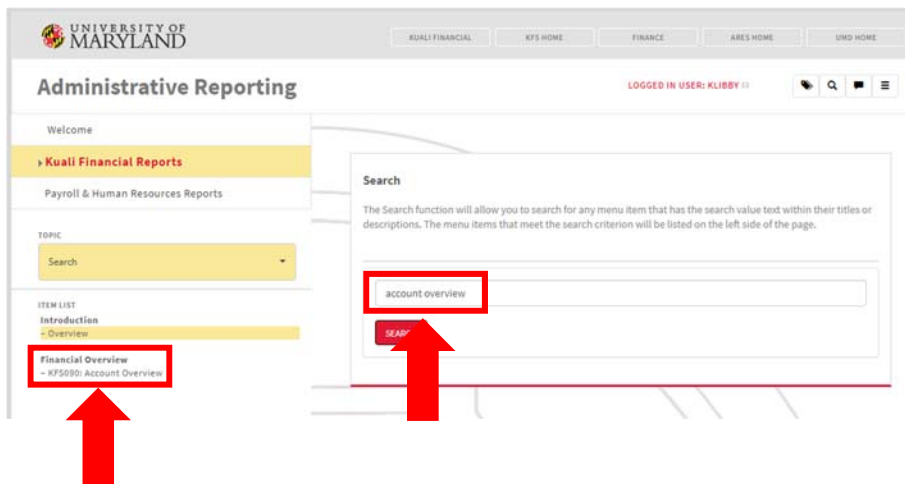
How to Access Kuali Financial Reports

The **Enterprise Reports** are displayed under the **Topic** drop-down menu. The **Overview Reports** can be found under the appropriate levels:

Account
Sub-Department
Department
Division
Executive
School
Campus

For example, to see the **KFS090: Account Overview** report follow the steps below:
1. On the **Administrative Reporting** main menu page, click on **Kuali Financial Reports**.
2. Click on the **Topic** drop-down menu.
3. Click on **Account Reports**.
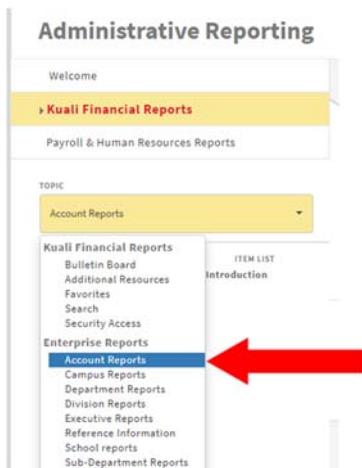
4. Under Financial Overview, click on **KFS090: Account Overview**.
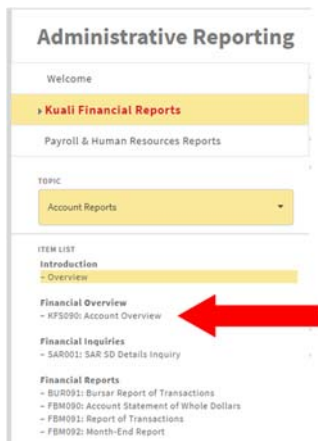
5. Under Financial Overview click on **KFS090: Account Overview.**
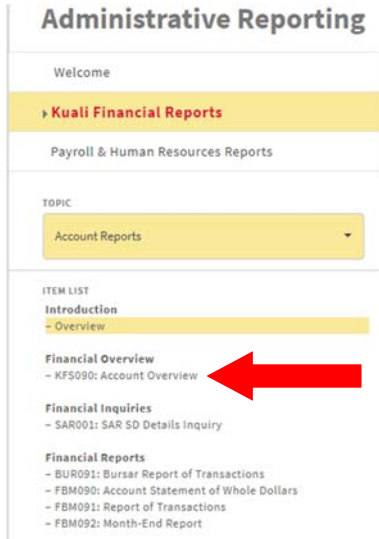
6. Click on **Open KFS090: Account Overview**.
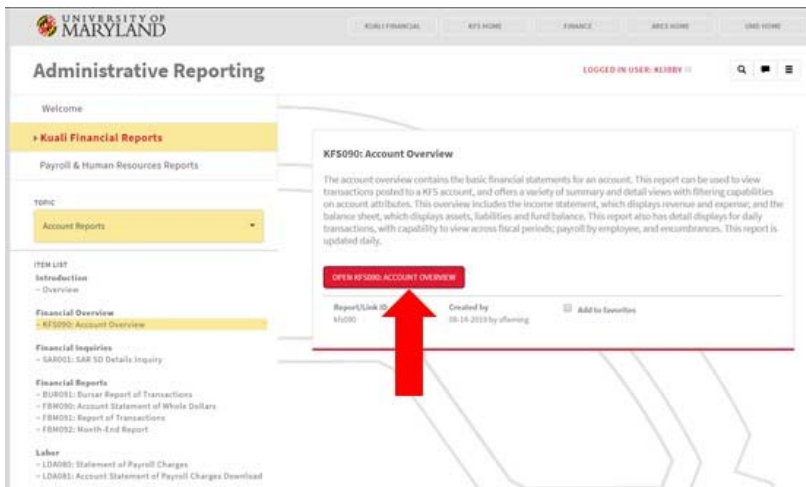
7. The screen below displays while the report is populating.
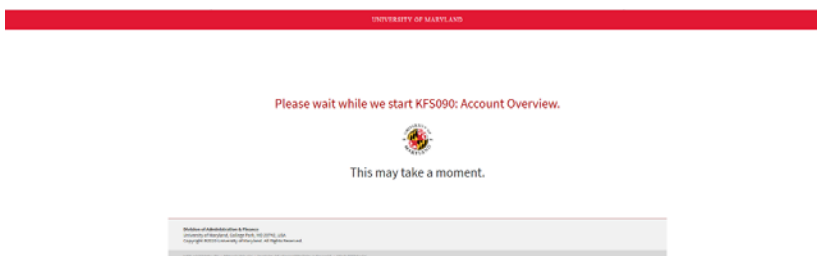
8. The Account Overview report will be displayed as below.
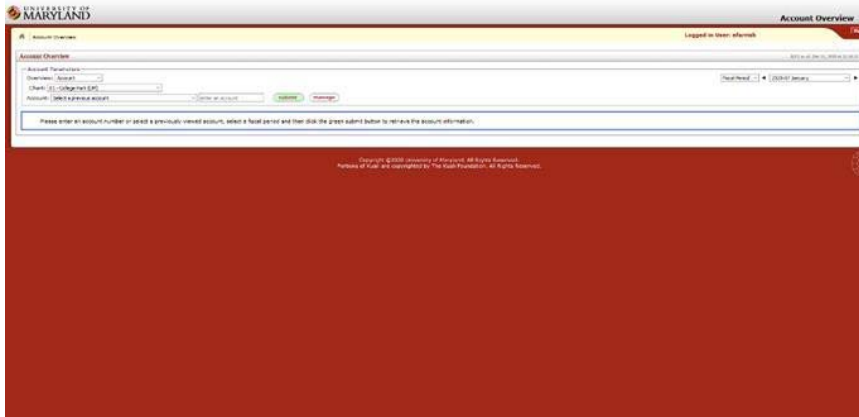
How to View Obsolete Reports

Obsolete reports are no longer generally utilized by campus users.

Any report that is **not** listed below is an obsolete report.

- KFS X90
- FBM 090/91/92
- SAR
- LDA X081
- FBM X95
- FPP 411
- BOR

To view obsolete reports, follow the steps below:

1. On the **Administrative Reporting** main menu page, click on **Kuali Financial Reports**.
2. In the far-right hand side of the **Administrative Reporting** menu, click on the **Settings icon**.
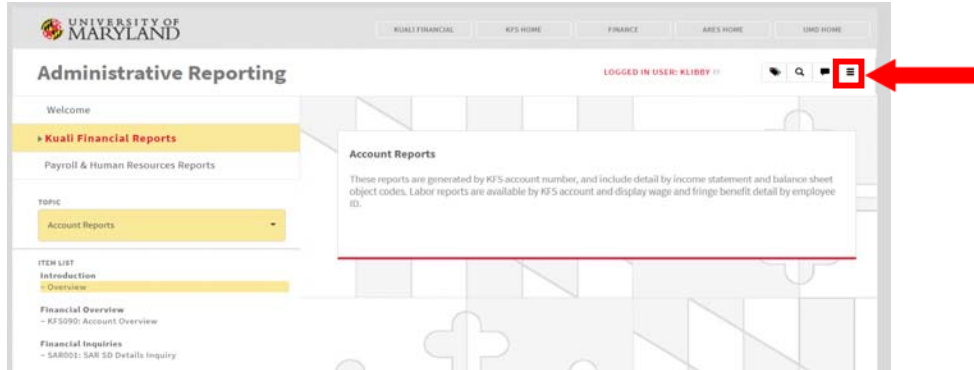
3. Check the **Include Obsolete Reports** box, and click **Save and Close**.
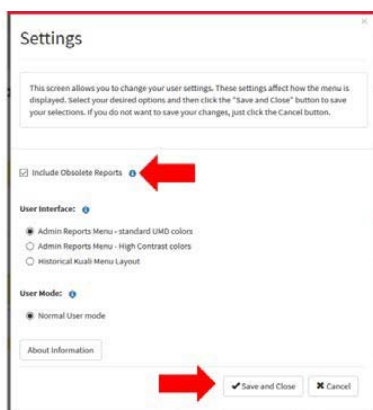
How to Get to the Historical Kuali Menu

1. On the **Administrative Reporting** main menu page, click on **Kuali Financial Reports**.
2. In the far-right hand side of the **Administrative Reporting** menu, click on the **Settings icon**. ≡
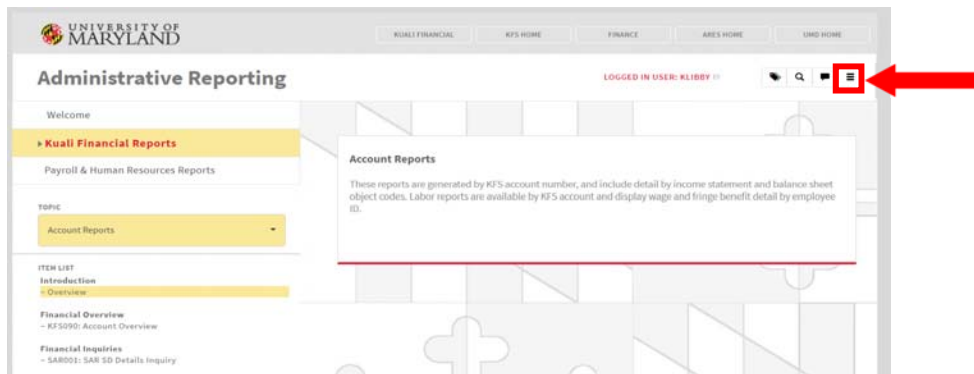
3. Under the User Interface section, select **Historical Kuali Menu Layout** and click **Save and Close**.
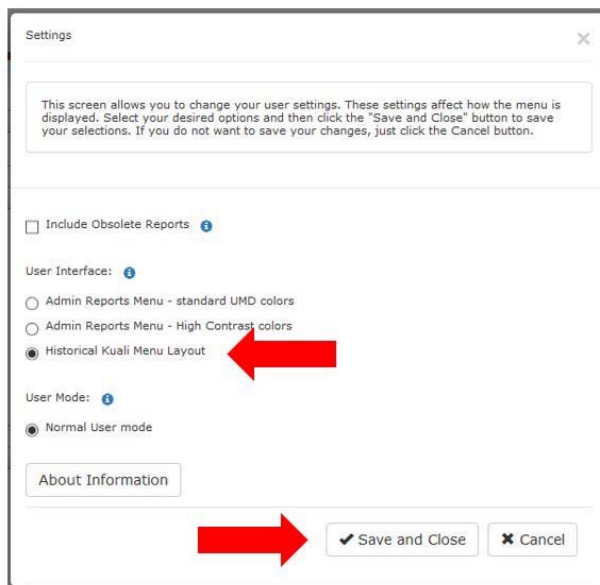
**4.** The Historical Kuali Menu Layout will populate.

How to Get to the Administrative Reporting Menu

1. On the **Administrative Reporting** main menu page, click on **Kuali Financial Reports**.
2. In the far-right hand side of the **Administrative Reporting** menu, click on the **Settings icon**. ☰
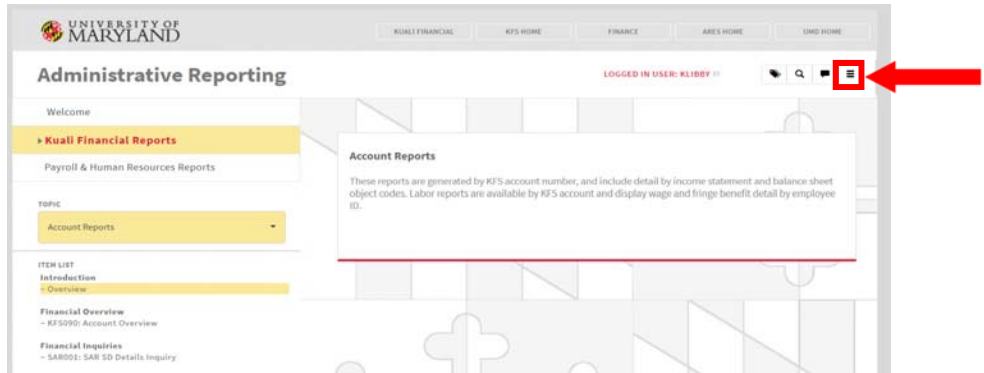
3. Under the User Interface section, select **Admin Reports Menu - standard UMD colors** or **Admin Reports Menu - High Contrast colors**. (This option allows you display the standard UMD color set or choose a high contrast color set. The High Contrast Color set will provide better readability for people who have low contrast sensitivity or color blindness. For more information, please see UMD's IT Accessibility page https://itaccessibility.umd.edu/).
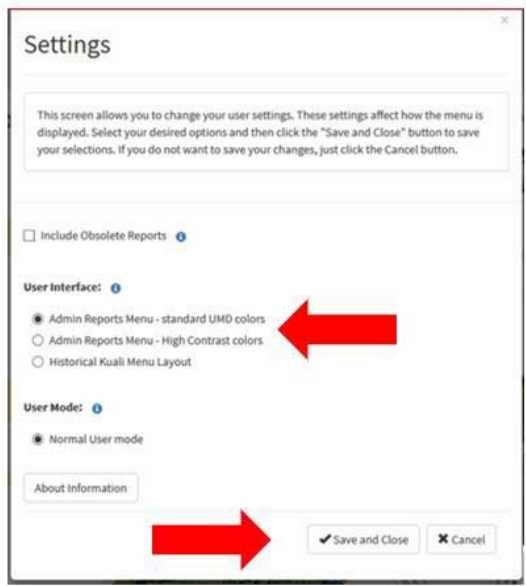
4. Click **Save and Close**.

5. The new reporting menu will be populated.