OFFICE OF BUSINESS AND FINANCIAL SERVICES

UNIVERSITY ACCOUNTING AND FINANCIAL REPORT (UAFR) | GRANTS & CONTRACTS (GCO)

My-UI-Financials

PRESENTER GUIDE

University of Illinois System

Urbana-Champaign • Chicago • Springfield

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My-UI-Financials

Presenter Guide

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Before You Begin

1. Before you begin training on ***My-UI-Financials,*** be sure your computer is set up to demonstrate the software.
2. Explain to participants why they'd want to use ***My-UI-Financials.***
    - Sell the application and give them the "what's in it for me" (WIIFM).
    - Explain the application's features, functions, and benefits. For example, they can now get their standard reports in a faster, easier way, it'll save them time, and so on.
3. State the objective of the training.
    - Example: By the end of this training, you'll be able to:
        - Generate a standard report.
        - Change a role in the RVM.
4. Show the participants how to log in to ***My-UI-Financials*** and the Report View Module (RVM).
5. Know your audience
    - Create scenarios that the average user will encounter.
        - Base those scenarios (or tasks) around a feature of the system and then demonstrate how to do that particular task.
        - When you're finished demonstrating, walk them through it as they perform the same task on their computer. In all, you'll go through the scenario twice—your demonstration and their demonstration.
6. Be prepared to answer questions that aren't ***My-UI-Financials***-related. For example, someone may questions about their budget or other business office functions.
7. Navigate to the ***My-UI-Financials*** Resource Page (obfs.uillinois.edu/my-ui-financials) at the beginning and end of the training. This gets them familiar with seeing and using the website.
8. Explain to them where they can go to get help.
    - ***My-UI-Financials*** Resource Page
    - Help tab in ***My-UI-Financials***
    - Email obfsuafrdashboard@uillinois.edu

NOTE: If you or your participants have recommendations for improvements or additions to the ***My-UI-Financials*** system, please email obfsuafrdashboard@uillinois.edu.

Log In to My-UI-Financials

1. Log in to ***My-UI-Financials*****.**
   a. You may also go the OBFS website (www.obfs.uillinois.edu), and select ***My-UI-Financials*** from the **Log in to:** section in upper right area of the website.
2. Enter your User name and Password in the **User name** and **Password** fields.
3. Click the **Login** button.

Interface Overview

Start this section by discussing the information on the dashboard such as the information in each column under the All Funds tab.

For example, Current Month Expenditures (Curr Month Exp), Expenses, Encumbrances, Budget Balance Available (Bud Bal Avail), and so on.

Next, show and describe the interface features starting in this order:

Fiscal Year and Fiscal Period

Example:

____
____.

Filters

Example:

____
____.

Search

Example:

____
____.

Generate a Standard Report

Example:

____
____.

Save and Print Reports

Example:

____
____.

Tabs

- ALL FUNDS
- HELP
- GO TO RVM

To get job aids for each task in this section, go to the **My-UI-Financials Job Aids & Training Materials** page: https://www.obfs.uillinois.edu/my-ui-financials/job-aids-training-materials/.

Reports View Module (RVM) Overview

Explain to participants what the RVM is and what it does. Describe the features, functions, and benefits of the RVM.

Click on this link: https://myresearch.uillinois.edu/reportViewModule/ to log in to the RVM.

Roles and Definitions

Role	Definition
Grant Report Assigner	Can view a grant and assign additional viewers and assigners for any grant or fund within their grant.
Grant Report Viewer	Can view a grant and any funds within that grant.
Fund Report Assigner	Can view a fund and assign viewers and assigners for any fund or CFOP including or under that fund.
Fund Report Viewer	Can view a fund.
Project Report Assigner	Can view a CFOP and assign viewers and assigners to this CFOP or those under this CFOP.
Project Report Viewer	Can view a CFOP.
Report Assigner	Can view all data for an Org and assign viewers and assigners for any CFOP, Org, Grant, or Fund in that Org.
Report Viewer	Can view all data for an Org.

Tabs

- Grants View
- Funds View
- Orgs and CFOPs View
- Search
- My Profile

Assign and Remove a Role

Show how to do this, but make sure it's the way they're most likely to use.

Example:

____
____.

View All My Roles

Example:

____
____.

Search, Manage, and View Roles by User

Demonstrate the **More Action** button and how they can select **Copy** and **Move** from the menu.

Example:

____
____.

Search, Manage, and View Roles by Grant, Fund, Org, or CFOP

Example:

____
____.

To get job aids for each task in this section, go to the **My-UI-Financials Job Aids & Training Materials** page: https://www.obfs.uillinois.edu/my-ui-financials/job-aids-training-materials/.

Training Review and Questions

- Review the objectives they were supposed to meet at the end of the training.
- Review again where the go to get help:
    - ***My-UI-Financials*** Resource Page
    - Help tab in ***My-UI-Financials***
    - Email obfsuafrdashboard@uillinois.edu
- Ask if they have questions.
- Pass out the evaluation in Appendix B.

Appendix A: My-UI-Financials Resources

My-UI-Financials Resource Page: www.obfs.uillinois.edu/my-ui-financials

Crosswalk: My-UI-Financials Report Names

Old Report Name	New Report Name	EDDIE Report Title	View Direct Report ID	Report Location
Operating Ledger Transaction Statement	Revenue/Expense/Transfer Transactions	FIOL_Revenue_Expense_Transfer_Transactions	FIOLTRANS#	*My-UI-Financials, View Direct, EDDIE*
Detail Operating Ledger Statement	Revenue/Expense/Transfer Detail Statement	FIOL_Revenue_Expense_Transfer_Statement (Detail Tab)	FIOPLEDGR#	*My-UI-Financials, View Direct, EDDIE*
Summary Operating Ledger Statement	Revenue/Expense/Transfer Summary Statement	FIOL_Revenue_Expense_Transfer_Statement (Summary Tab)	FIOPLEDGS#	*My-UI-Financials, View Direct, EDDIE*
Detail Operating Ledger Statement ITD	Revenue/Expense/Transfer Detail Statement Inception to Date	FIOL_Revenue_Expense_Transfer_Statement_Inception_to_Date (Detail Tab)	FIOPLEITD#	*My-UI-Financials, View Direct, EDDIE*
Summary Operating Ledger Statement ITD	Revenue/Expense/Transfer Summary Statement Inception to Date	FIOL_Revenue_Expense_Transfer_Statement_Inception_to_Date (Summary Tab)	FIOPLITDS#	*My-UI-Financials, View Direct, EDDIE*
Encumbrance Statement	Encumbrance Balances	FIOL_Encumbrance_Balances	FIGLENCUM#	*My-UI-Financials, View Direct, EDDIE*
General Ledger Transaction Statement	Asset/Liability Transactions	FIGL_Asset_Liability_Transactions	FIGLTRANS#	*View Direct, EDDIE*
Detail General Ledger Statement	Asset/Liability Detail Statement	FIGL_Asset_Liability_Detail_Statement	FIGENLEDG#	*View Direct, EDDIE*
Summary General Ledger Statement	Asset/Liability Summary Statement	FIGL_Asset_Liability_Summary_Statement	FIGENLEDS#	*View Direct, EDDIE*
Labor Distribution Statement - Pay Period	Payroll Expense by Person Pay Period		HRPAY00104	*View Direct*
Labor Distribution Statement - Month End	Payroll Expense by Person Month End	FIPR_Payroll_Expense_by_Person_Month_End (Access based on *My-UI-Financials* permissions - see Business Manager.)	HRPAY00103	*My-UI-Financials, View Direct, EDDIE*
Personnel Encumbrance Statement Pay Period	Payroll Encumbrance by Person Pay Period		HRPAY00098	*View Direct*
Personnel Encumbrance Statement Monthly	Payroll Encumbrance by Person Month End	FIPR_Payroll_Encumbrance_by_Person_Month_End (Access based on *My-UI-Financials* permissions - see Business Manager.)	HRPAY00102	*My-UI-Financials, View Direct, EDDIE*
Payroll Encumbrance Statement MYE Year End	Payroll Encumbrance by Person MYE Year End	FIPR_Payroll_Encumbrance_by_Person_MYE_Year_End (Access based on *My-UI-Financials* permissions - see Business Manager.)	HRPAY00097	*My-UI-Financials, View Direct, EDDIE*

Appendix B: Training Evaluation

Print the evaluation on the next page, and ask participants to fill it out. Keep a copy of the evaluation for your records.

NOTE: If you or your participants have recommendations for improvements or additions to the ***My-UI-Financials*** system, please email obfsuafrdashboard@uillinois.edu.

My-UI-Financials Presentation—Evaluation

Presenter: ____

Date: _________________ Location: _______________________

Read each statement, and place an **"X"** in the appropriate box.

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand what the ***My-UI-Financials*** system can do and how it can be useful to me.				
The presenter clearly answered any questions that were asked.				
I know how to get help when using ***My-UI-Financials***.				
I will use ***My-UI-Financials*** for my reporting needs.				
Please comment on the following statements.				
List one issue, situation, or problem in your work environment that you'll be able to address or solve with the information provided today.				
Please list any remaining questions or concerns.				
Please write any additional comments.				

Thanks for your participation and feedback!