Updated Account Analysis Report & New Financial Reports Available

Account Analysis Macro File Updated

The Account Analysis macro file has been updated to include a column on the BudgetSummary tab called "% Remaining." This column has been requested by many users and will provide a percentage view of remaining spending authority.

VARIANCE		% Remaining
$	(999,996.00)	100.00%
$	6.00	0.00%
$	150,423.73	31.51%

The updated macro file is available on the knowledge base for you to run your own set of data. Always use the most updated file available to run your own data. The new macro file and Quick Reference Guide can be found at the following link for your convenience: Account Analysis Report in Scheduled Processes

Users who use the pre-built account analysis report on the UW warehouse drive run by Financial Affairs will see this new column on future reports after the month of April is closed.

Financial Reporting Table of Contents: New Reports Available

The Financial Reporting Table of Contents is a dashboard that holds many supplemental reports than can be used to view or track different types of expenditures. Users can access this dashboard as long as they have taken the mandatory training for basic system access. Step-by-step guidance on accessing the Table of Contents and setting favorites for easier navigation in the future, can be found in the following Quick Reference Guide: Navigating to the Transactional Reporting Table of Contents and Set Favorites in Reports and Analytics

Two new reports have been created and added to this Table of Contents dashboard. Please see the below table for information regarding these reports.

Report Name	Description	QRG Link

Contract Status Report **(NEW)**	This report can be used to view contracts by department and their associated status. Users can prompt the report to view a specific contract or to view all contracts within a department. This report can help aid in determing where the contract is in the workflow (i.e., Pending Signature, Pending Approval, Draft, etc.).	Quick Reference Guide
Procure-to-Pay Report **(NEW)**	This report replaces the other four procurement reports on the dashboard and has combined the information into one report. This report will help aid in viewing the life cycle and status of purchase requistions. Users can use this report to look up a specific purchase requisition or purchase order number or to view all requisitions/purchase orders within a department. This report will help users see all purchase orders and their associated status (i.e, closed for receiving, closed for invoicing, open, pending approval, rejected, etc.).	Quick Reference Guide

If you have any feedback on reports, such as additional information you'd like to see on the report, we encourage you to submit a ticket to the Help Desk by emailing userhelp@uwyo.edu.

Contact Information

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