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DATA EXPLORATION GUIDE

This guide is designed to provide information on accessing data for fiscal year end reporting. The guide will present tools you can use to help your workflow.
THINGS YOU NEED TO KNOW

1. To retrieve data available through UAccess Analytics System you will need to request the appropriate provisioning role. *BI_FS_MED and (BI_HR_MED or BI_HR_HIGH)*

2. Make sure you understand the *UAccess Acceptable Use Policy* and *Security Awareness Training*.

3. The data presented in the UAccess Analytics tools are not publicly available. Please do not share this information with unauthorized users and/or the public.
REQUESTING ACCESS TO THE DATA

The Access Provisioning Tool (APT) is used to request access to, as well as removals from, restricted functions in UAccess systems. This is not necessary for self-service access that is included with your active employment profile.

*Eligibility: Active UA Faculty, Staff or Designated Campus Colleague (DCC) may enter requests using the Tool. Prior to requesting access, the UAccess Acceptable Use Policy and Security Awareness Training must be reviewed and completed.*

To submit an access request visit (requires UA NetID):
https://apt.iam.arizona.edu/Requests/create
STEPS FOR REQUESTING ACCESS

1. Create a new request for access using your UA NetID, Employee ID, Name, or Email.

Access Provisioning Tool v3.1

Create a New Request for

NetID, EmplID, Name or Email o  Submit  i

https://apt.iam.arizona.edu/Requests/create
STEPS FOR REQUESTING ACCESS

2. Select an Access Provisioning Liaison to approve your request.

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<th>Subject</th>
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<tr>
<td><strong>Name</strong></td>
<td>Wilbur Wildcat</td>
</tr>
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<td><strong>Primary Affil</strong></td>
<td>staff</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td><a href="mailto:wilbur@email.arizona.edu">wilbur@email.arizona.edu</a></td>
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<tr>
<td><strong>Phone</strong></td>
<td>(520) 621-2211</td>
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Select an Access Provisioning Liaison to Approve this Request

- Wilma Wildcat - Athletics - Business Manager
3. Select a Request Type (Access Needed for Job Duties), Request Reason (New Hire or Current Employee), and Business Justification (for example “Access needed to run Financial Summaries reports on for Fiscal Year End.”).

All fields are required

Request Type
Access Needed for Job Duties

Request Reason
New Hire or Current Employee

Business Justification
Please include a business justification, keeping in mind that “to do my job” or “need access the same as (another person)” is not specific enough for this purpose.

By submitting this request, you certify it is being made in response to a legitimate business need.

Continue to role selection
STEPS FOR REQUESTING ACCESS

4. Make a selection from the Access/Roles for the System and Subject Area. You will want to select UAccess Analytics and the particular role needed.

Select Access/Roles

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<th>Subject Area</th>
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<td>Base Access</td>
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<td>UAccess Analytics</td>
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Business Justification for these roles (Please review the Business Justification previously described and provide more information for roles selected here, if needed).

Make Selections

- Base Access: Access to all unrestricted data from UAccess Employee, Student, and Financials systems.

5. Click the Save Button after making your selection.

The request will be reviewed and approved by the Access Provisioning Liaison selected in step two.
The Family Educational Rights and Privacy Act (FERPA)

All student data holders must act responsibly and be held accountable for safeguarding students’ personally identifiable information (PII) from education records.
EXPLORING DATA LITERACY
with University Analytics & Institutional Research
WHO WE ARE & WHY WE ARE HERE

UAIR IS COMMITTED TO providing data that empowers campus decision makers, informs policy and practice, and tells the Arizona story.
WHAT IS DATA LITERACY?

DATA LITERACY is the ability to read, work with, analyze, and argue with data. Improving data literacy hones your decision-making ability.
DATA-INFORMED DECISION MAKING

EVERY EMPLOYEE should be empowered to make data-informed decisions. We are committed to empowering the university community to understand and work with data.
WHERE DOES THE DATA COME FROM?

**DATA** must be collected, organized, and stored in a data warehouse. The systems that collect this data are often referred to as *transaction systems*. At the University of Arizona, most of our data originates in the UAccess Systems.
How can I prepare for the end of the fiscal year?
FISCAL YEAR END
Background & Critical Deadlines
The University’s Fiscal Year accounting period is between July 1 – June 30.

Financial data is collected and reported in the University’s Comprehensive Annual Financial Report (CAFR).

This report provides the institution’s financial position and activities.
PREPARING FOR YEAR-END

It is important that revenues and expenditures are appropriately classified and recorded in the correct fiscal year.

Goods or services received and/or provided on or before June 30 should be processed in FY2020.
FY2020 IMPORTANT DATES

- Financial Services provides a list of important dates for fiscal year end.
- Visit their website for specific deadlines: https://www.fso.arizona.edu/financial-management/year-end
  - **June 30, 2020:** Interim close of fiscal year 2020 period 12. Interim reports will be available in UAccess Analytics for this period on Wed. July 1.
  - **July 18, 2020:** Period 12 will close.
How can UAccess Analytics tools help?

UAIR has created several reports and tools in UAccess Analytics that are here to assist you in planning for fiscal year end close.
UACCESS ANALYTICS TOOLS & DASHBOARDS
INFORMATION TO SUPPORT PREPARATION FOR THE FISCAL YEAR END
What are some useful tools to help manage my accounts for year-end reporting?
What reports can help me monitor my organization’s accounts?

The **General – Financial Management** dashboard delivers tools to monitor general financial information. It is a practical means for account reconciliation. On this dashboard, you can find reports on transactions, payroll, income, and expenses.

*Path to Reports:*

_UAccess Analytics Dashboards > Financial > General – Financial Management*
Where can I go to find information for account reconciliation?

The **Account Reconciliation** tool provides six different reports on one page for a selected account number. Reports include account balance, income, expenses, transactions, and more.

*Please note: The tool will only work for one account number at a time.*

*Path to Reports:*
UAccess Analytics Dashboards > Financial > General – Financial Management > Account Reconciliation
How does this relate to Fiscal Year End?

The **Account Reconciliation** provides a good overall view of a given account’s current position. The tool lets you know if you have any transactions that have occurred in the current period (period 12 for FYE) that may require adjustment.
ACCOUNT RECONCILIATION REPORTS

- Current Account Balance
- Income / Expense
- Encumbrances and Pre-Encumbrances
- Transactions
- Open Operational Encumbrances
- Payroll Expenditure Listing
- Position Encumbrance Detail
Select the fiscal year, period number, and account number to filter reports.
What does the * and ° symbol mean?

The following symbols are used on many of our dashboards to help users navigate the prompts:

- This symbol identifies a field that is mandatory as a prompt when running reports on that page.

- This symbol identifies fields that have a default value populated when you first open the dashboard; you may change or remove these default values as needed.

*Please note: Populated fields without this symbol may have been carried over from a previous page on the same dashboard.*
This report gives the current information for the account including supervisor and manager names.
This report details information on budget, income, expense, transfers, current balance, etc. for the selected account.
Select a view for the report.

This report gives details on income and expenses for the selected account.
This report details encumbrances and pre-encumbrances for the selected account.
Select a view for the report.

### Reconciliation View

Summary by Account and Object Code
Detail by Account and Object Code
Reconciliation View by Period

This report details transactions for the selected account.
Select a view for the report.

This report details transactions for the selected account.
This report details payroll expenditures for the selected account.
Select a view for the report.

- Summary by Account and Object Code
- Detail by Account and Object Code
- Summary by Sub-Account and Sub-Object Code
- Detail by Sub-Account and Sub-Object Code
- Summary by Account and Employee

This report details position encumbrances for the selected account.
How do I discover what transactions are still en route for FY2020?
What transactions are en route?

The **En Route Transaction** dashboard is designed to allow the user to view en route transactions across all UAccess Systems. Transactions can be viewed by:

- **Transactions Pending Approval**
- **Transactions Initiated**

*Path to Reports:*
UAccess Analytics Dashboards > Employee > Business Manager Home Page > UAccess Enroute Transactions
How does this relate to Fiscal Year End?

The **En Route Transactions** lets you know what transactions are still routing and risk being impacted by FYE procedures. Once year end adjustment transactions begin to route, they must be processed in a timely manner.

Please refer to the detailed list of important dates:
https://www.fso.arizona.edu/financial-management/year-end/dates-fy2020
Select the individual, organization, or college. Then select a transaction type you would like to use to filter the data.
Click on the number of transactions to bring up a detailed report of items.
### UAccess Enroute Transactions
#### Financials (KFS) Transaction Details

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<th>Disbursement Voucher</th>
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<th>Document Number</th>
<th>Document Title</th>
<th>Link to eDoc</th>
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<td>View Document</td>
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Return - Create Bookmark Link
Did you know there is a tool to help reconcile your PCard statements?

The **PCard Statement Reconciliation** dashboard contains transaction level detail for transactions occurring during a given period. This tool can be used in lieu of a Purchasing Card Statement.

*Please note: The Post Date range defaults to the dates of the previous billing cycle and should match your most current PCard Statement.*

*Path to Reports:*
*UAccess Analytics Dashboards > Financial > General – Purchasing Card > Statement Reconciliation*
How does this relate to Fiscal Year End?

Since Pcard statements and reconciliation do not align perfectly with the University’s fiscal periods, the **PCard Statement Reconciliation** dashboard will facilitate the Pcard reconciliation process for the statement that crosses the two fiscal years.
Select the filters for the report.
Select a view for the report.

This report details purchasing card transactions for a selected account and time period (Post Date).
Where can I find information on expiring accounts, ending positions, and ending Designated Campus Colleagues (DCC) relationships?
How to I keep track of our organization’s employee information?

The **Business Manager Home Page** provides a means of monitoring employee information. It can provide reports on expiring accounts, ending positions, and ending Designated Campus Colleagues (DCC) relationships.

*Path to Reports:*
*UAccess Analytics Dashboards > Employee > Business Manager Home Page > Home*
How does this relate to Fiscal Year End?

The Business Manager Home Page dashboard provides several reports that will support the management of positions, DCC Relationships, and funding that may expire with the end of the fiscal year. Using this dashboard, you can take action to ensure your positions, DCCs and funding sources are all updated prior to the start of the new year.
BUSINESS MANAGER HOME REPORTS

- Positions Ending (30, 60, 90, or 120 days)
- DCC Relationships Ending (one month)
- Employees with Visa Expiring (six months)
- Accounts Expiring (90 days)
- Positions Funded from Expiring Accounts (30 days)
- Month’s Birthdays & Work Anniversaries
Enter the Department ID

* - This symbol identifies a field that is mandatory as a prompt when running reports on that page.
* - This symbol identifies fields that have a default value populated when you first open the dashboard; you may change or remove these default values as needed.

Positions Ending

The first report details positions which are ending within 30, 60, 90, or 120 days.

<table>
<thead>
<tr>
<th>Employee Id</th>
<th>Employee Name</th>
<th>Department Id</th>
<th>Position Number</th>
<th>UA Title</th>
<th>Expected End Date</th>
<th>Reason</th>
<th>Supervisor Name</th>
</tr>
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</table>

* Position Ending Within

and number of days.
This report details Designated Campus Colleague Relationships which are ending in the month.
This report details employees with expiring Visas for a six-month period.

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Position Number (Primary Job)</th>
<th>Position Description</th>
<th>Visa Permit Type</th>
<th>Visa Expiration Date</th>
<th>Citizenship Country Long Description</th>
<th>Job Department</th>
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Analyze - Refresh - Print - Export
This report details expiring accounts for a 90-day period.

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<tr>
<th>Organization Code</th>
<th>Expiration Date</th>
<th>Account Number</th>
<th>Account Name</th>
<th>Closed Flag</th>
<th>Fiscal Officer Name</th>
<th>Manager Name</th>
<th>Supervisor Name</th>
<th>Sub Account Number</th>
<th>Continuation Account Number</th>
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This report details expiring accounts for a 90-day period.
This report details positions that are funded from accounts that will expire in the next 30-days.
How do I track payroll expenses and salary expense transfers?

The **Payroll Expenditure Listing with SET** dashboard report shows payroll expenditures and salary expense transfers (SET) for a department. There are pivots to show the data in summary and in detail, listed by department, object code, employee, etc.

*Path to Reports:*
*UAccess Analytics Dashboards > Financial > General – Labor Ledger > Payroll Expenditure Listing with SET*
The Payroll Expenditure Listing with SETs allows you to review payroll and make any necessary adjustments prior to the end of the Fiscal Year. There is a specific view titled Fiscal Year Summary by Employee Name that provides a good overview of where an employee was paid from throughout the year.
Select the fiscal year, fiscal period, and organization code to filter the report.
Select a view for the report.

This report details Payroll Expenditures and Salary Expense Transfers.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee Id</th>
<th>Position Name</th>
<th>Job FTE</th>
<th>Project Code</th>
<th>Project Name</th>
<th>Account Number</th>
<th>Sub Account Number</th>
<th>Object Code</th>
<th>Object Code Name</th>
<th>Sub Object Code</th>
<th>Hours Worked</th>
<th>Expenditure Amount</th>
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Is there a way I can identify positions or individuals that will be ending?

The **Rollover Home** page has two dashboard tools to retrieve information on individuals and jobs with expected end dates and no expected end dates.

*Path to Reports:*
UAccess Analytics Dashboards > Employee > Rollover > Home
> Individuals/Jobs with Expected End Date
> Individuals/Jobs with NO Expected End Date
How does this relate to Fiscal Year End?

The Rollover Home is another page to support the management of positions and employees. It allows you to review jobs and personnel with expected end dates and make any necessary adjustments prior to the end of the Fiscal Year.
Select the job department, college ID, employee ID, etc. to filter the report.
This report details Jobs and Employees with expected end dates (Graduate Assistants/Associates, VISA expirations, etc.).
Select the job department, college ID, employee ID, etc. to filter the report.
This report details Jobs and Employees with NO expected end dates (a value of 01/01/1900).
How do I make sure I have accounted for sponsored projects and award accounts?
Where do I find encumbrances and expenditures for sponsored projects?

The **Sponsored Award** dashboard provides information regarding Personnel Encumbrances and Expenditures on Sponsored Projects.

*Path to Reports:*
UAccess Analytics Dashboards > Research > Awards > Award Personnel
> Award Personnel Encumbrances
> Award Personnel Expenditures
How does this relate to Fiscal Year End?

The **Award Personnel Expenditures** provides year to date personnel expenditures of individuals paid from sponsored accounts. This is useful to look at the end of the year and just make sure everyone paid on a sponsored award should be on that account.

The **Award Personnel Encumbrances** provides details about any remaining personnel encumbrances on sponsored awards. You can review and make any necessary year end position distributions to ensure everyone is being funded from the correct accounts.
Select the fiscal year, college, organization, employee, or account information you would like to use to filter the data.
Click on the account number to bring up a detailed report of the account items.

Sponsored Award Personnel Expenditures

All expenditure amounts are sponsored awards funds for fiscal year-to-date.

$277.0K YTD Personnel Expenditures on Awards

26 Employees

32 Positions

7 Sponsors

4 Agency Types

3 Fund Sources

Select a view: Summary by Employee

---

University Analytics & Institutional Research
Please note: This detailed report links to the General – Financial Management – Account Reconciliation dashboard.

NOTES: This dashboard will only work for one account at a time. If you wish to see more than one account, please use the links to individual reports.

The Accounting Category prompt must be un-filtered in order to return correct results on the Current Account Balance report for Cash Style accounts.
Select the college, organization, employee, or account information you would like to use to filter the data.
Click on the account number to bring up a detailed report of the account items.

This detailed report shows all encumbrances for the sponsored award personnel.
Please note: This detailed report links to the General – Financial Management – Account Reconciliation dashboard.
What other useful tools are available for cleaning up my accounts at year end?
How do I know what fund transfers are allowed between different accounts?

The **Allowable Transfers** dashboard is designed to assist you in learning the rules and appropriate transfer documents to use in processing the movement of funds between different accounts and sub-funds.

*Path to Reports:*

**UAccess Analytics Dashboards > Financial > General – Financial Management > Overview**

Listed under the **Reconciliation Reports**

**UAccess Analytics Dashboards > Financial > General – System Value Sets > Allowable Transfers**
How does this relate to Fiscal Year End?

Since departments are working on cleaning up accounts at the end of the fiscal year, **Allowable Transfers** is a helpful tool to find the forms and documentation needed to transfer funds. You can filter the report by account number or sub-fund group code.
Select Account Number or Sub-Fund Group Code and set the values you would like to use to filter the data.
This report shows an allowable transfer of funds result. You can pull detailed lists of accounts and sub-fund groups this account can transfer to. Additionally, you can see what transfer options are available to you in the YES outcome.
Here is the detailed report of the Sub-Fund Groups this account can transfer funds to.
Allowable Transfers

1. Would you like to search by Account Number or Sub-Fund Group?
   - [ ] Account Number
   - [ ] Sub-Fund Group Code

2. Between what Account Numbers are you thinking about transferring budget?
   - From: 
   - To: 
   - [ ] Apply

Transfer of Funds Allowed?
- [ ] Yes
- [x] No

Transfer Options:
- No Additional Options

Transfer Restrictions:
- State Funds Cannot Support Or Be Supported By Other Funds

Transfer Exceptions:
- None

Admin Service Charge Expenditure:
- 

Here we see an account where the transfer of funds is not allowed. Even with a negative result, you can still pull the detailed lists of accounts and sub-fund groups this account can transfer to.
WE WANT TO HEAR FROM YOU!

We hope that this guide provided you with useful resources for your year-end reporting needs. Let us know what you think and what services could be helpful to you.

Please take a moment to provide some feedback:

https://uarizona.co1.qualtrics.com/jfe/form/SV_41u119CEO3XlwS
THE VALUE OF CUSTOMER EXPERIENCE

UAIR is here to provide ongoing customer experience, training, and support. We want the campus community to have the knowledge and the know-how to take full advantage of our products and services.
STILL WANT TO KNOW MORE?

TAKE ADVANTAGE OF OUR KNOWLEDGE. UAIR is here to enhance data literacy and customer experience for campus.

- **UAIR Newsletter**
  (providing information and news to the campus community)

- **UAccess Analytics Training**
  (basic & intermediate level workshops)

- **Analytics Office Hours**
  (visit with our staff to have your individual questions answered)

- **UAccess Community**
  (a community of users and resources)

- **Data Exploration Series**
  (providing quarterly data literacy presentations)

Visit our website for more information or to sign-up: [https://uair.arizona.edu/](https://uair.arizona.edu/)
Connect with us.

uair.arizona.edu

uair@arizona.edu