

Release Notes

Below is a summary of the RF BI Service Requests that are in the most recent release of the RF Report Center. This release moved into the production environment on or before Saturday, August 25th, 2018.

Category	Description	Service Request Numbers
Bug	Post Award Management was not handling Award Organization name changes when modified in EBS. Awards were appearing with two Organization names which was not rolling data up correctly, causing duplicate rows of data. Awards should only have one Organization Name. The issue has been corrected.	354425/355256 and 355676
Bug	Purchase Orders 1097829 and 1101912 Remaining Active Encumbrance was not matching Oracle. Report Center was showing remaining active encumbrance dollars on the PO's where they should have been zero. The issue has been corrected.	353436/354298
Bug	<p>Cost Sharing/Matching Information has been redesigned for ease of use after discovering a few issues in the original design in Subject Area Post Award Management. Several fields were removed or removed.</p> <ol style="list-style-type: none"> 1. Modify any analysis that is using Match Applicable and Match Flag from the Related Effort folder. Remove conditions. 2. Replace any analysis that is using the Cost Share Commitment field from the Fact-Award folder with Cost Share Commitment from the Related Effort folder. <p>Related Effort folder:</p> <ul style="list-style-type: none"> Active Flag Cost Share Commitment Inactive Reason Match Applicable removed <p>Fact – Award folder:</p> <ul style="list-style-type: none"> Cost Share Commitment – Moved to Related Effort folder <p>Award folder:</p> <ul style="list-style-type: none"> Match Flag – Moved from Related Effort folder <p>In the shared folder, 000 Public by CO Reporting/Grants (Updated Daily) the below analyses were revised and a new one has been added.</p> <ul style="list-style-type: none"> Revised: GABA Awards missing Related Award based on Cost Share Info Field Revised: Grants Sponsored Awards with related Cost Share Award Revised: Grants Cost Share/Match Budget and Commitment not equal Revised: Grants Cost Share/Match Commitment Monitoring Report Revised: Grants Sponsored Awards with related Cost Share Award New: Grants Cost Share Monitoring Report Awards Missing Cost Sharing Companion 	354534/355017
Enhancement	COEUS file change to only update the COEUS Subject Areas for proposal status.	350246



Enhancement	The new field "Preferred Name" has <u>been added</u> to Person folder under the following business subject areas: Human Resources - Benefit Enrollments Human Resources - Labor Distribution Human Resources - Operational Data Store Human Resources - Retirement	354300
Enhancement	The new field "CIP Code" has been added to Award folder under the following business areas: Account Payables - Invoice Check Distributions Account Payables - Invoice Distribution Account Receivables - Aging Account Receivables - Receipts Award Management - Installments General Ledger - Balances Human Resources - Labor Distribution Post Award Management Post Award Management - Award Credit Post Award Management - Committed Effort Post Award Management - Project Credit Post Award Management - Transaction Controls Pre-Award Management Purchase Order Distribution Reporting Center Reconciliation Requisition Distribution	353521
Enhancement	The new field "Description" has been added to Budget Version folder under the Post Award Management subject area.	354482

If you have any questions regarding the above-listed release notes, please contact the Data Services team by sending an email to rreportcenter@rfsuny.org

Thank you for your continued support as we continue to enhance the RF Report Center to provide a robust analytical tool for the user community.

Report Center Tip and Tricks

Scheduling Agents

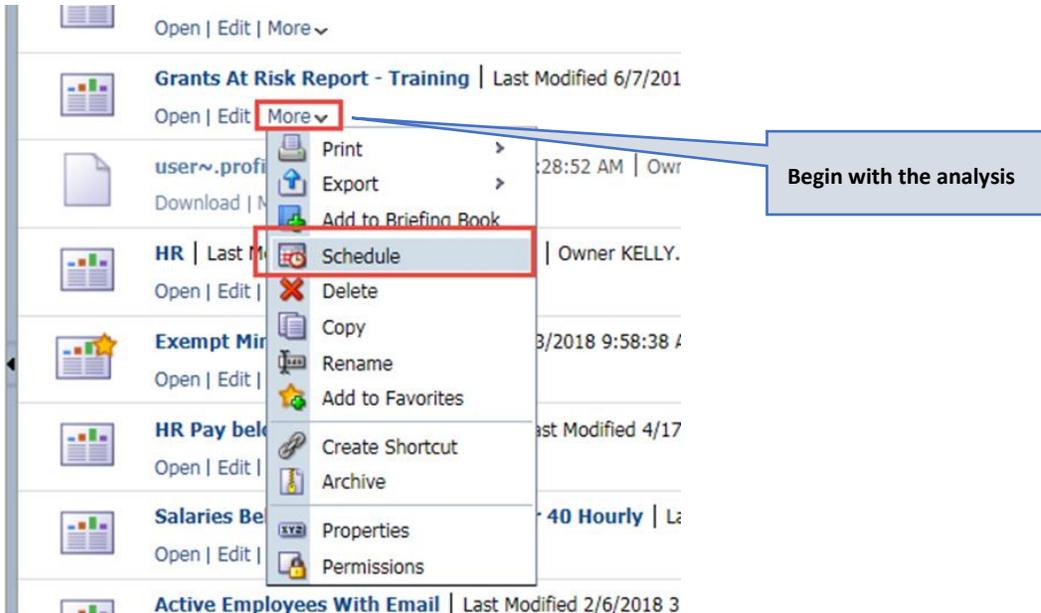
Reports, otherwise known as Agents, allow you to schedule an analysis based on a defined schedule to end users. To create an Agent, you will have to set up the following tabs.

- General Tab
- Schedule Tab
- Delivery Content Tab
- Recipients Tab

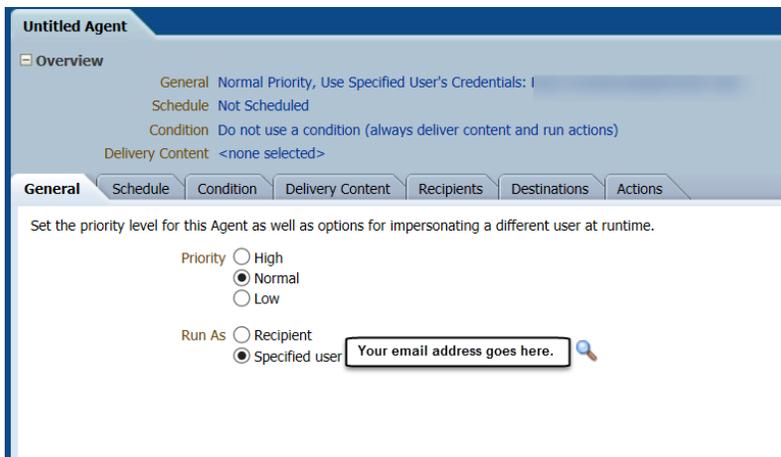
There are many ways to start to **Schedule Agents**, here we will show you the recommended approach which is to begin with your analysis so that it is automatically added to the agent.

Steps

1. Click the **More** button and select **Schedule**.



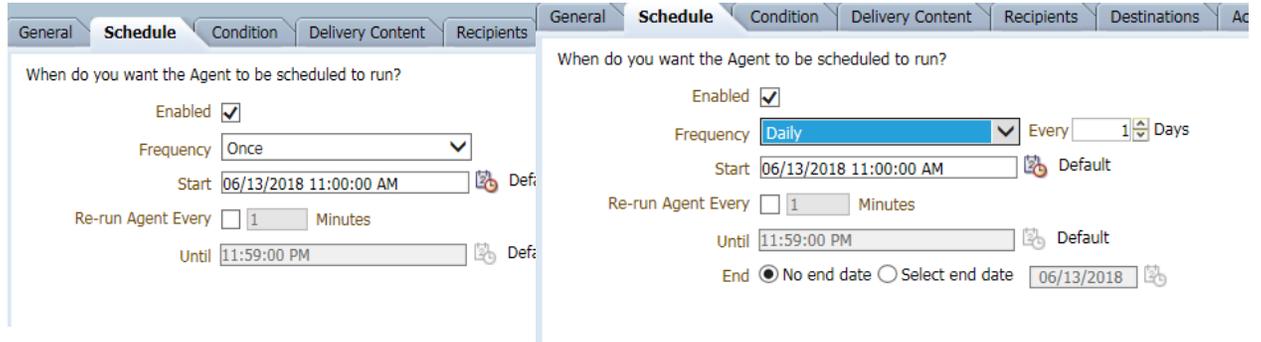
2. General Tab – Complete the following sections.
Priority: Specify the priority of the delivery content that an agent is to deliver and how to send the delivery content.
Run As: Select Specified User – your email address will automatically be populated.



- 3.

3. Schedule Tab –The Schedule tab specifies when an agent runs, how often it runs, and when it should be discontinued. There are three parts to an Agent schedule:
 - Start date and time
 - Frequency
 - End date and time

Use the Frequency drop-down list to specify how often the agent runs. Selecting Never creates nonscheduled agent.



When do you want the Agent to be scheduled to run?

Enabled

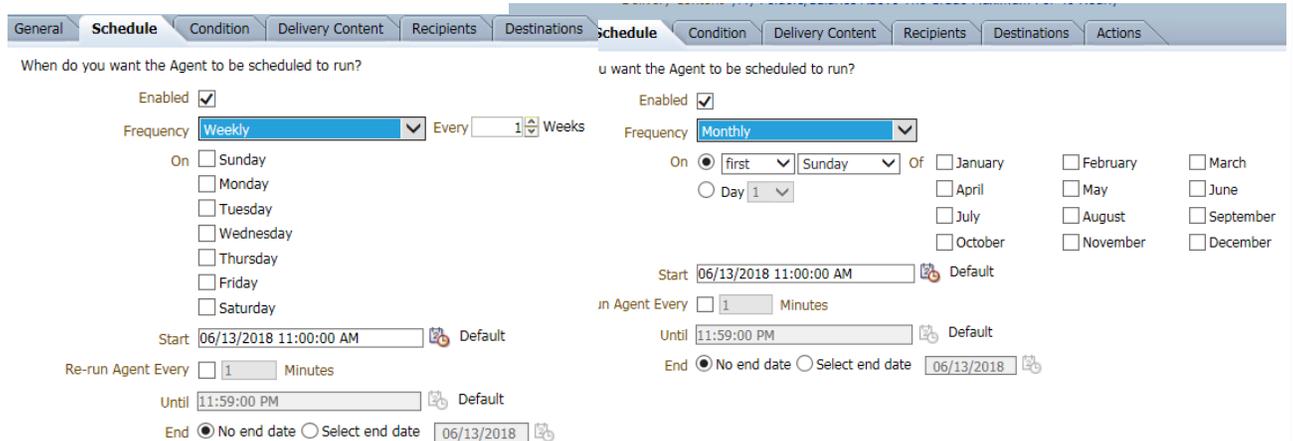
Frequency **Daily** Every Days

Start Default

Re-run Agent Every Minutes

Until Default

End No end date Select end date



When do you want the Agent to be scheduled to run?

Enabled

Frequency **Weekly** Every Weeks

On Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Start Default

Re-run Agent Every Minutes

Until Default

End No end date Select end date

4. Delivery Content Tab –Specify the content to be delivered by the agent. You can specify the following:

1. **Subject:** The subject line to include with the content
2. **Format:** The delivery format for the content such as PDF or Excel.
3. **Delivery:** Recommended setting is to Deliver as attachment.
4. **Attachment Note:** You can attach a note that will be part of the email body.
5. **If Condition is False:** Select the “If Condition is False” check box to specify whether to deliver a text message to the recipient when there is no agent content to deliver to them and then enter the text message to be delivered.

General | Schedule | Condition | **Delivery Content** | Recipients | Destinations | Actions

Specify the content to deliver with the Agent

1 Subject: Grants at Risk Monthly Report

Content: Condition Analysis [Browse...] [Customize...] [Clear]
 /My Folders/Salaries Above The Grade Maximum For 40 Hourly

2 Format: Excel 2007+

Delivery: Deliver results directly
 Deliver as attachment

3 Attachment Note:
 Please see the attached report.

4

If Condition is False Deliver this message

5

5. Recipients Tab - Specify who should receive the delivery content of the agent.

Add email recipients by clicking on the email icon.

General | Schedule | Condition | Delivery Content | **Recipients** | Destinations | Actions

Direct Agent Recipients
 Specify who will receive this Agent.

Select Recipients
 Show: All [v]

[+] [Email Icon] [X]

Add Email Recipient

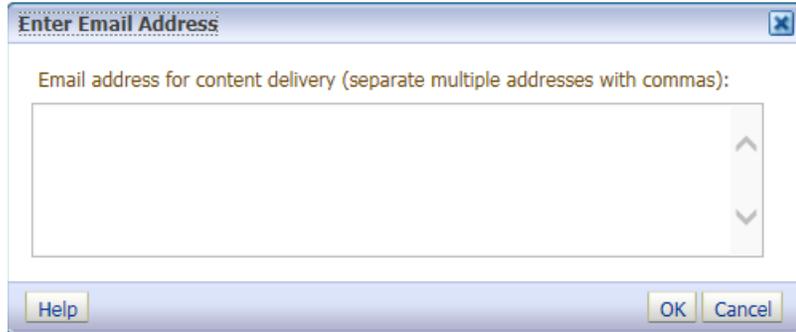
Name
[Email Icon] James.O'Brien@rfsuny.org
DO NOT ADD HERE

Use Analysis
 Get Recipients from the Analysis Used in the Agent Condition
 Analysis Salaries Above The Grade Maximum For 40 Hourly

Publish for Subscription
 Enable this Agent to be published and determine which users can subscribe to this Agent.

Publish Agent for subscription Allow subscribers to customize Agent

This window will display and this is where you enter one or more email addresses, separated by commas, and click OK.



6. You will need to Save the agent to your directory.

