

### 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 and is visible as of Sunday, July 29<sup>th</sup>, 2018.

Category	Description	Service Request Numbers
Enhancement	<p>Two new subject areas have been added:</p> <ul style="list-style-type: none"> <li>▪ PACS - Proposals</li> <li>▪ PACS - Proposals Credit Distribution</li> </ul> <p>Base analysis queries have been created and are located in the Catalog using the following path: Shared Folders &gt; 000 Public by CO Reporting &gt; PACS Proposals.</p> <p>Principal Investigator Dashboard has been updated with a new page: <b>My Proposals</b></p> <p>Operation Managers Dashboard is in progress with a new page for Proposals.</p>	351204
Enhancement	<p>Location name changes:</p> <ul style="list-style-type: none"> <li>• 655 System Admin - Provost to 655 System Admin-VCRED</li> <li>• 660 System Administration - Chancellor to 660 SUNY Strategic Support</li> </ul>	353304
BUG	<p>Grants Snapshot – Project Credit Distribution subject area was not always displaying the correct expenditure amount when using single month only. The issue has been corrected.</p> <p><b>Note:</b> Remove <b>Person Extra Information Folder</b> from any analysis temporarily until 8/26. Any analysis using this folder will possibly not reconcile to the SPAR if the person does not have <b>Person Extra Information</b> entered in EBS. We have identified an additional bug with the folder when using with the subject area that will be implemented as part of August Release.</p>	353514
Enhancement	<p>New field <b>Technology Transfer Agreement Id</b> has been added in two Accounts Payables subject areas:</p> <ul style="list-style-type: none"> <li>• Accounts Payable - Invoice Check Distributions&gt;AP Invoice Check Distribution</li> <li>• Accounts Payable - Invoice Distribution&gt;AP Invoice Distribution</li> </ul>	353880
BUG	<p>Terms and Conditions field was not handling deletes from EBS correctly. The issue has been corrected</p>	354067/354355
BUG	<p>Agency Specific Form field was missing in the Award Compliance folder in Post Award Management subject area. The issue has been corrected.</p>	354213
Enhancement	<p>Additional EBS reference fields have been added to the <b>Reference</b> folder in several subject areas.</p> <p>New reference fields:</p> <ul style="list-style-type: none"> <li>• Investigator-Initiated Clinical Trial</li> </ul>	353401/353760

	<ul style="list-style-type: none"> <li>• Match to COE</li> <li>• Subject to NYS Form B</li> <li>• Philanthropic Indicator</li> <li>• Invoices must be sent by email only</li> </ul> <p>Subject Areas:</p> <ul style="list-style-type: none"> <li>• Account Receivables - Aging</li> <li>• Account Receivables - Receipts</li> <li>• Award Management - Installments</li> <li>• Grants Snapshot</li> <li>• Grants Snapshot - Award Credit Distribution</li> <li>• Grants Snapshot - Financial Reporting</li> <li>• Grants Snapshot - Project Credit Distribution</li> <li>• Post Award Management</li> <li>• Post Award Management - Committed Effort</li> <li>• Post Award Management - Transaction Controls</li> </ul>	
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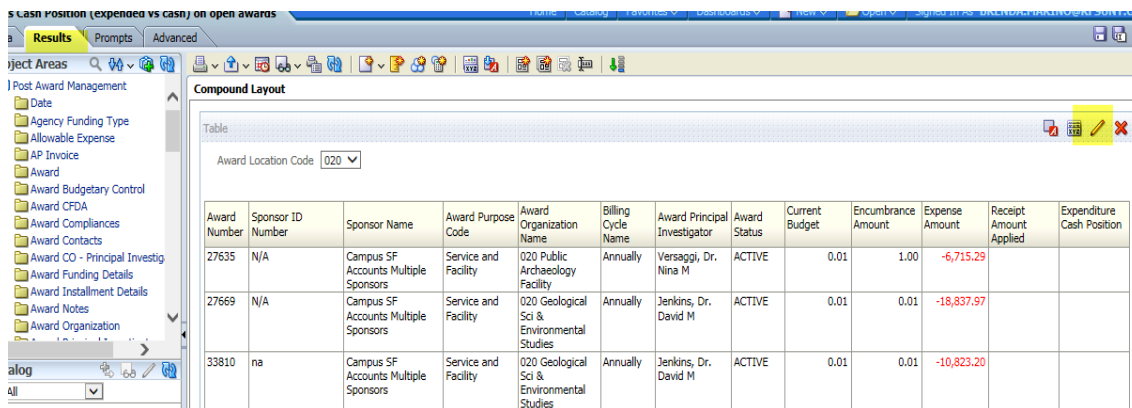
If you have any questions in regards to the above-listed release notes, please contact the Data Services team by sending an email to [rreportcenter@rfsuny.org](mailto:rreportcenter@rfsuny.org)

*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

**Edit column properties from the results tab.**

In the Compound Layout (you should be on the Results tab), click the **Edit View** button.



In the Selected Columns pane, click **Options** beside the column name, and then select **Column Properties**

Award Location Code: 020

Award Number	Sponsor ID Number	Sponsor Name	Award Purpose Code	Award Organization Name	Billing Cycle Name	Award Principal Investigator	Award Status	Current Budget	Encumbrance Amount	Expense Amount	Receipt Amount Applied	Expenditure Cash Position
27635	N/A	Campus SF Accounts Multiple Sponsors	Service and Facility	020 Public Archaeology Facility	Annually	Versaggi, Dr. Nina M	ACTIVE	0.01	1.00	-6,715.29		
27669	N/A	Campus SF Accounts Multiple Sponsors	Service and Facility	020 Geological Sci & Environmental Studies	Annually	Jenkins, Dr. David M	ACTIVE	0.01	0.01	-18,837.97		
33810	na	Campus SF Accounts Multiple	Service and Facility	020 Geological Sci & Environmental	Annually	Jenkins, Dr. David M	ACTIVE	0.01	0.01	-10,823.20		

Layout

Selection Steps

Column Properties Context Menu:

- Column Properties...
- Format Headings...
- Format Values...
- Hidden
- Aggregation Rule >
- Duplicate Layer
- Remove Column

Specify how you want column values to be displayed. Format column headings and custom text, and add data display conditions.

Style:

**Column Properties**

Style | Column Format | Data Format | Conditional Format | Interaction

**Font**

Family: Default (System) | Size: | Color: | Style: **Bold** | Effects: Default (System)

**Cell**

Horizontal Alignment: Default (Right) | Background Color: | Vertical Alignment: Default (Top) |  Wrap Text

Image | Select Image | Position: Default (Right)

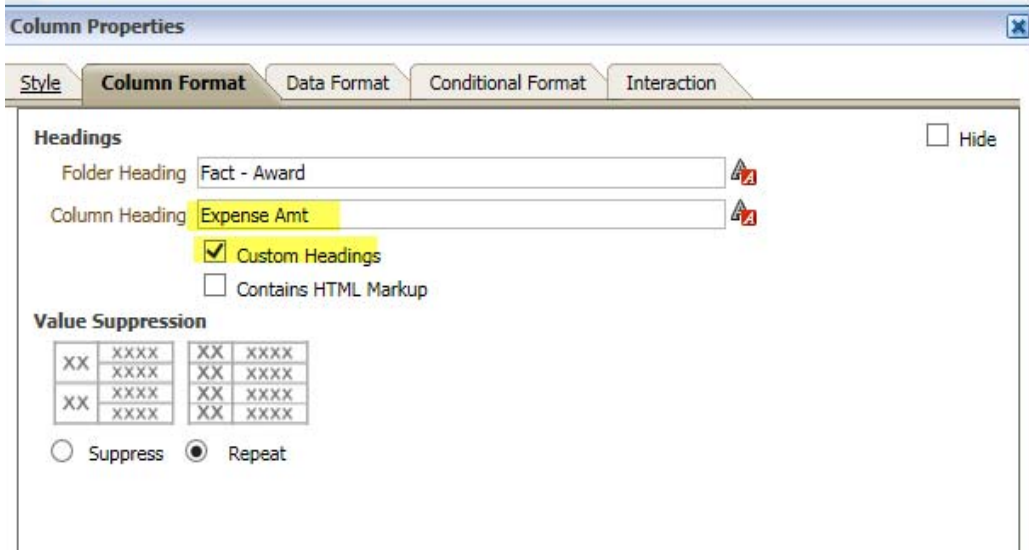
**Border**

Position: Default (System) | Border Style: Default (System) | Border Color: |

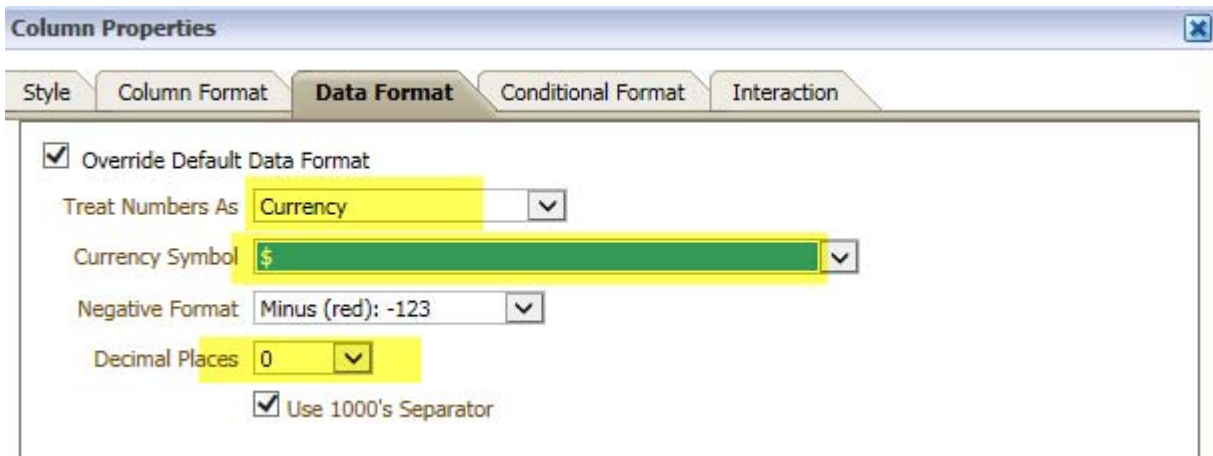
Additional Formatting Options  
 Custom CSS Style Options (HTML Only)

Help | OK | Cancel

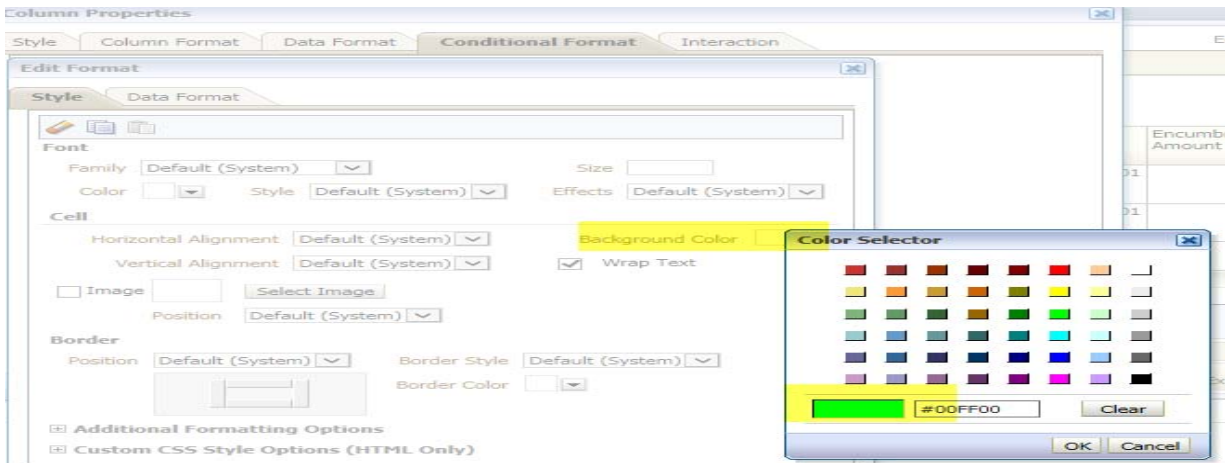
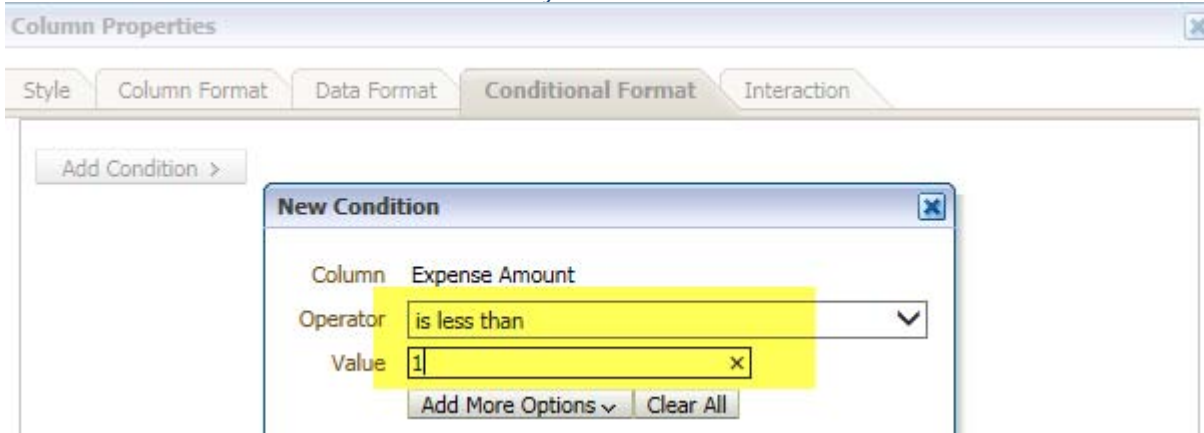
**Column Format:**

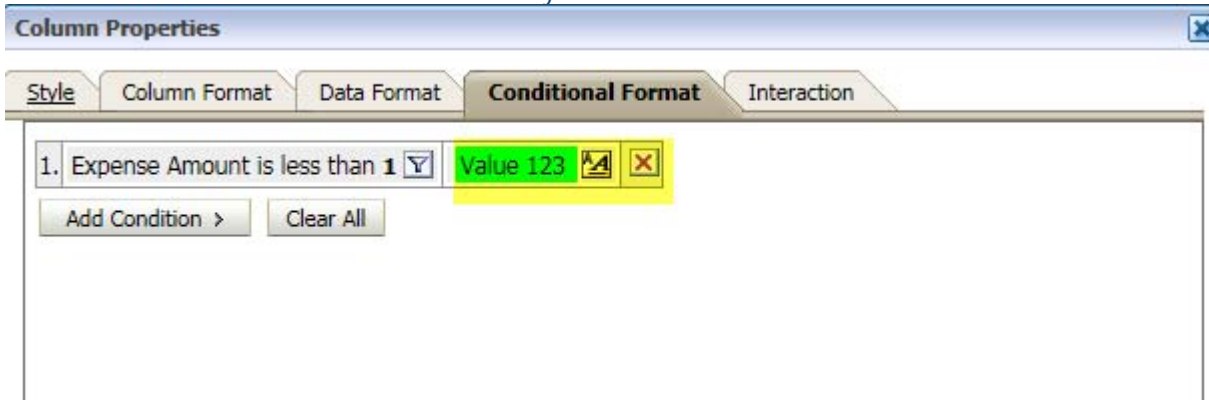


**Data Format:**



**Conditional Format:**





Results from the above Column Properties changes:

1. Style: Values are bold in Red and Black
2. Column Format: Expense Amount Column name change is now Expense Amt
3. Data Format: Currency in \$ and Red font for negative numbers
4. Conditional Format: Green for all values less than 1

Grants Cash Position (expended vs cash) on open awards

Criteria Results Prompts Advanced

Table Editing from: "Compound Layout" Done Revert

Award Number	Sponsor ID Number	Sponsor Name	Award Purpose Code	Award Organization Name	Billing Cycle Name	Award Principal Investigator	Award Status	Current Budget	Encumbrance Amount	Expense Amt	Receipt amount applied	Expenditure Cash Position
27635	N/A	Campus SF Accounts Multiple Sponsors	Service and Facility	020 Public Archaeology Facility	Annually	Versaggi, Dr. Nina M	ACTIVE	0.01	1.00	66,715		
27669	N/A	Campus SF Accounts Multiple Sponsors	Service and Facility	020 Geological Sci & Environmental Studies	Annually	Jenkins, Dr. David M	ACTIVE	0.01	0.01	-918,878		
33810	na	Campus SF Accounts Multiple Sponsors	Service and Facility	020 Geological Sci & Environmental Studies	Annually	Jenkins, Dr. David M	ACTIVE	0.01	0.01	-910,843		
42112	na	Multi Funding	Third Party Recharges	020 Geological Sci & Environmental Studies	Cash Driven	Jenkins, Dr. David M	ACTIVE	32,472.62	475.25	\$29,621	32,472.62	2,851.50