May 2017

Retirement of Paper BAR & BSR Reports and Reduction in Direct Access to FAS/FIN

MyFinancial.desktop (MyFD) is supporting two major projects championed by the UW Finance Transformation (UWFT) program, both of which support HRP Workday go-live: one to retire paper BAR & BSR reports and another to reduce the number of users with direct access to FAS/FIN.

May 2017 will be the final month of printed BAR/BSR Reports. Additionally, new budgets created in 2017 will not receive printed BAR/BSR reports. Access to FAS/FIN will also be limited, helping to protect the privacy of faculty, staff, and student workers’ personal information related to leave taken. Both electronic BAR/BSR reports and the majority of information most users access via FAS/FIN (with some known exceptions such as PCA) will continue to be available in MyFinancial.Desktop.

These projects align with our campus-wide effort to reduce paper use and cost and simplifies the financial landscape by moving to more modern technology. Recently the School of Medicine and College of Arts & Sciences piloted these efforts, resulting in elimination of 3,000 printed BAR/BSRs. In May 2017, the paper used to print another 11,000 reports will be saved as the reports are retired.

Interested in turning off your printed BAR/BSR reports early?

Please email myfdhelp@uw.edu and provide your Dean-level Org code.

Please review the steps below to ensure you are ready to access and utilize these reports in MyFD.

1. Review our Website, eLearning Tutorials and take a MyFD Class
   - Webpage: Budget Summary (BSR)
   - eLearning tutorial: “Introduction to the Budget Summary”
   - Webpage: Transaction Summary (BAR)
   - More eLearning tutorials, classroom trainings and registration here: http://f2.washington.edu/fm/myfd/training

2. Verify ASTRA Access
   - Understand Inquiry or Expense Transfer Access http://f2.washington.edu/fm/myfd/access
   - Check your status here: http://itconnect.uw.edu/security/uw-netids/astra/
Biennium: Coming this Summer!

This summer UW will go through a Biennium Close. This is the time when our two year accounting cycle ends. This Biennium Close will be more complex this year due to the timing of Workday go-live. The implementation of Duo is already underway, key cutover dates and required action for June are available, and the last paycheck of the biennium (6/16 - 6/30 payroll) will be processed in Workday.

For those of you new to the University, to comply with Washington State accounting procedures for closing out the current Biennium, the University's books of account will be held open for a limited time during the month of July to record transactions processed after June 30 relating to business of the expiring fiscal period. The Biennium Cut-Off Dates are the final dates on which various transactions must be processed to ensure recording for biennium business.

Visit the MyFD webpage for Biennium Close for more information and continue checking through May, June and July for new updates.

For more information about Workday go-live and important cutover dates please see the HR-Payroll Change Network site. Additional information about Workday is also available at http://www.myworkday.uw.edu

Our June newsletter will include more information on Workday go-live and the impacts to MyFD and other systems. Training sessions will be held in May and June and instructional videos will become available via the Integrated Services Center website.

Newly Enhanced Trainings

When was the last time you visited the MyFD Training Resources eLearnings? Has it been a while? You may want to take another look. We have added some new resources and have enhanced others to include audio. Take a look at the Creating a Dynamic Budget List and Introduction to the Budget Summary.

This Month's Top FAQ

A common question our MyFD Help Desk gets asked is how to grant a colleague MyFD access or how to remove their access.

MyFD access is granted via ASTRA by department authorizers. If a user has Inquiry access and needs to be granted Expense Transfer access, it is a best practice to edit the existing access, rather than grant new access.

How do you know who can authorize access? Visit the ASTRA website and click on “Who Can Authorize Me?” Enter your UW NetID and password to gain access. You can search a number of ways such as using your Budget, Organization or Department. Then, select the application you are inquiring about such as MyFD, ProCard or eTravel.

To read more of our FAQs regarding MyFD access, click here.

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