MyReports Enhancement Summary

UCSF

New Reports and Enhancements since March 2014				
DECEMBER 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**

Organization Report
  - *Added ability to include Subtotal in expenses*
  - *Added ability to run report at Account Level F*
  - *Added Display Codes and Descriptions filter to filter page and report header*
	12/22/2017		X	X

Payroll Detail by Month Report - *Added ability to run report by Employee(s)*	12/22/2017		X	X
NOVEMBER 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Monthly Report - *Added ability to include Subtotal in expenses*	11/30/2017		X	X
Transaction Detail Report – *Filter page* - *Added Sort 1 and Sort 2 options*	11/30/2017		X	X
UCSF Health McKesson AP Detail Report	11/13/2017	X		
SEPTEMBER 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**

Controller's Office Website Inquiry Reports
  - *Department Functional Roles Inquiry*
  - *Alt Account Inquiry*
	9/7/2017	X		

AUGUST 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Sponsored Awards Summary Report - *Changed to display only the most current Invoice Type assigned to the Project*	8/18/2017		X	

Sponsored Projects Balances Report
  - *Added Business Unit to report output*
  - *Added ability to Include Inactive Project-Activity Periods to filter page*
	8/30/2017		X	

JULY 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Faculty Monthly Rolling Projections Report	7/3/2017	X		X

Faculty Portfolio Projections Upgrade
  - *Added ability to enter comments in all data entry cells*
  - *Improved search functionality*
	7/17/2017		X	

JUNE 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Asset Management Report - *Added ability to sort results by any column in the report*	6/21/2017		X	
Net Position Report - *Added ability to sort results by any column in the report*	6/21/2017		X	
MAY 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**

Monthly Report
  - *Added Display Codes and Descriptions filter to filter page*
  - *Added Unformatted Data output option*
	5/22/2017		X	

Sponsored Projects Balances Report
  - *Added Unformatted Data output option*
  - *Added ability to sort results by any column in the report*
	5/22/2017		X	

MyReports Enhancement Summary

New Reports and Enhancements since March 2014				
APRIL 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Filter Page Enhancements - Added Show Detail Group 1, Detail Group 2, and Display Codes and Descriptions filters to the filter page of the following reports: - Employee Appointment Report - Employee Distribution Report	4/13/2017		X	
Monthly Report - Added ability to run report in Account Level F	4/17/2017		X	
Distribution of Payroll Expense (DPE) Report - Added new "Benefits to Earnings Ratio" column - Added subtotals and totals on all numeric elements within the "Show Detail Columns" section - Now allows sorting results by any column in the report	4/27/2017		X	X
Performance Tuning - Accounts Payable/Purchase Order (AP/PO) Inquiry Report (66% faster)	4/27/2017		X	
MARCH 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Filter Page Enhancements - Moved validation of From/To filter dates to the Run button in the following reports: - Balance Sheet Report - Distribution of Payroll Expense Report - Employee Appointment Report - Employee Distribution Report - Fund Group Report - Gift & Endowment Income Report - HR Event Report - Mission Based Report	3/29/2017		X	X
Filter Page Enhancements - Moved validation of From/To filter dates to the Run button in the following reports:w - Net Position Report - Project Comparison Report - Project Use Report - Transaction Detail Report	3/29/2017		X	X
UCSF Health Income Statement Report - Added Beginning Net Position, Changes in Net Position, and Ending Net Position for monthly and YTD actuals	3/30/2017		X	
UCSF Health Income Statement Variance Report - Added Beginning Net Position, Changes in Net Position, and Ending Net Position for monthly and YTD actuals	3/30/2017		X	
UCSF Health Key Operating Trends - Added Beginning Net Position, Changes in Net Position, and Ending Net Position for monthly and YTD actuals	3/30/2017		X	
Payroll Funding Report	3/30/2017	X		X
FEBRUARY 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Sponsored Projects Balances Report – *Filter page* - Added Show Liens checkbox	2/14/2017		X	
Project Summary Report – *Filter page* - Added Show Projections & Liens checkbox	2/27/2017		X	
Award/Parent Summary Report – *Filter page* - Added Show Projections & Liens checkbox	2/27/2017		X	
Net Position Report – *Filter page* - Changed default to Show 2 Decimal Places	2/27/2017		X	X

MyReports Enhancement Summary

New Reports and Enhancements since March 2014				
JANUARY 2017	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Employee Lookup Report - Added Business Unit to output	1/17/2017		X	
UCSF Health Key Operating Trends - Added ability to display prior fiscal year	1/17/2017		X	
Monthly Report – *Filter page* - Added ability to Change Account Level	1/17/2017		X	
Organization Report – *Filter page* - Added ability to Change Account Level	1/23/2017		X	
Net Position Report – *Filter page* - *Added Show Liens checkbox*	1/30/2017		X	
DECEMBER 2016	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Announcements - *Implemented Announcement feature to communicate with users within the MyReports application*	12/1/2016		X	
Employee Appointment Report - *Added Business Unit to output*	12/20/2016		X	
Employee Distribution Report - *Added Business Unit to output*	12/20/2016		X	
HR Monthly Review Report - *Added Business Unit to output*	12/20/2016		X	
UCSF Health Income Statement Variance Report	12/29/2016	X		
UCSF Health Key Operating Trends	12/29/2016	X		
NOVEMBER 2016	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Modified Purchase Order and Voucher Details - *Enhanced **Accounts Payable/Purchase Order Inquiry Report** and **Purchase Order Lien Balance Report** to display the Business Unit assigned at the distribution line level*	11/1/2016		X	
Filter Page Enhancement - *Added empty ("- Blank") values to run report without a specific chartfield or attribute*	11/1/2016		X	
UCSF Health Income Statement Report	11/7/2016	X		
Transaction Detail Report - *Filter page* - *Added Show Benefit Detail Rows checkbox*	11/30/2016		X	
OCTOBER 2016	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Faculty Portfolio Monthly Report - *New Analyst and Faculty report views added* - *Created hybrid account level view that displays personnel expenses at account level B and non-personnel expenses at account level C* - *Added ability to display or hide chartfield code columns* - *All HTML filter options added to the main filter page* - *Distribution percentages now included when showing employee names* - *Monthly running balances added for sponsored projects* - *Project start and end dates now included in report header* - *Search results now include Dept ID*	10/10/2016		X	X
MySchedules and MyFavorites - *Added ability to schedule reports* - *Added ability to update stored MyFavorites criteria and MyFavorites names*	10/17/2016		X	
UCSF Health Alt Account Detail Report	10/17/2016	X		
UCSF Health Balance Sheet Report	10/17/2016	X		
SEPTEMBER 2016	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Transaction Detail Report - *Enhanced to allow sorting results by any column in the report*	9/20/2016		X	

MyReports Enhancement Summary

New Reports and Enhancements since March 2014				
AUGUST 2016	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Faculty Portfolio Projections - *Added new Projections by Employee Sheet allowing projections to be entered across multiple chartstrings for a single employee*	8/22/2016		X	X
Performance Tuning - *Project Summary Report (70% faster)*	8/30/2016		X	
JUNE 2016	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
MyPortfolio Report - *Added MyFavorites functionality to report*	6/1/2016		X	
Filter Page Values Cleaned Up - *Removed invalid values that remained from some non-PeopleSoft systems such as activity periods consisting of letters and accounts containing decimals*	6/1/2016		X	
MAY 2016	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Distribution of Payroll Expense (DPE) Report - *Added Business Unit to output*	5/1/2016		X	
MyReports Server Upgrade - *Newer, more powerful servers installed to replace servers nearing end of warranty period and increased overall performance and server response times*	5/1/2016		X	
APRIL 2016	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
MyPortfolio Report - *Changed filter default to Exclude Burn Rate Graphic*	4/1/2016		X	X
FEBRUARY 2016	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Payroll Detail by Month Report - *Added ability to run the report for 6 or 12 months with options to choose the starting month* - *Added ability to display Projections, Projected Expense Adjustments, Prior Periods Actuals, and Average Time* - *Addition of Employee to Sort 1 options* - *Added additional sort option and ability to include secondary headers and subtotals* - *Added ability to run report by pay elements such as Gross Pay, % DPE, VLA, or Benefits*	2/1/2016		X	X
Project Comparison Report	2/16/2016	X		X
DECEMBER 2015	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Data Warehouse - *Batch tuning, in conjunction with PS teams, to mitigate morning data delays* - *Automated the start of the nightly batch job to eliminate delays after completion of the PS batch job*	12/23/2015		X	
OCTOBER 2015	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Performance Tuning - *MyPortfolio Report (53% faster)* - *FP Payroll Detail by Month Report (30% faster)* - *HR Monthly Review Report (63% faster)*	10/15/2015		X	
SEPTEMBER 2015	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Performance Tuning - *Organization Report (34% faster)*	9/15/2015		X	
HR Event Report	9/21/2015	X		X
Net Position Report - *Changed the "From" date filter to default to the beginning of the current fiscal year*	9/21/2015		X	X

MyReports Enhancement Summary

New Reports and Enhancements since March 2014				
AUGUST 2015	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Additional Gift and Endowment Data Available - *Added Rolling 12 months of market data to CO Website Inquiries and Ad Hoc Business Views* - *Added Use, Purpose, and I&O fee to CO Website Inquiries*	8/1/2015		X	
HR Employee Lookup Report - *Added ability to display chartfield codes/descriptions* - *Enhanced to allow sorting results by most columns* - *Added Unformatted Data output option* - *Rearranged columns to be consistent with the DPE* - *Reduced size of report banner to increase data display* - *Changed default report option to most common selection*	8/28/2015		X	
JULY 2015	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Filter Page Enhancement - *Enhanced search box to be cleared after a filter value is identified and selected for quicker searching and selecting of additional filter values*	7/1/2015		X	
Performance Tuning - *Actuals vs Plan Comparison Report (87% faster)* - *Current Year vs. Prior Year Actuals Report (59% faster)* - *Monthly Report (60% faster)* - *Fund Group Report (39% faster)* - *Mission Based Report (39% faster)* - *Project Use Report (40% faster)*	7/31/2015		X	
JUNE 2015	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Enhanced Portfolio Projections *Key enhancements include:* - *Revised F&A calculations to improve accuracy* - *Added Monthly budget projections for sponsored projects* - *Added ability to define end date when inserting future PPS payroll distributions* - *Added ability to define benefits rate by employee* - *Added rent recharge calculation* - *Added ability to delete projections by tab or Project* - *Added functionality to insert 'Comments' for Faculty*	6/1/2015		X	X
Modified all Faculty Portfolio Reports - *Modified 7 reports due to related enhancements to Portfolio Projections* - *Updated all Job Aids and training materials*	6/1/2015		X	X
APRIL 2015	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Consolidated Financial Report	4/21/2015	X		
Filter Page Enhancement – MyFavorites - *Added ability to save and edit additional filter values*	4/29/2015		X	X
MARCH 2015	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Filter Page Performance - Software Upgrade - *Decreased filter page load time to a few seconds*	3/9/2015		X	
FEBRUARY 2015	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Account Tree Level D - *Modified for Portfolio Projections enhancement project*	2/1/2015		X	X
Data Warehouse - *Added adjustment periods*	2/4/2015		X	
Performance Tuning - ***Gift & Endowment Income Report*** *(60% faster)*	2/12/2015		X	
Data Warehouse & Ad Hoc Business Views - *Added 'Use and Purpose' data for gifts and endowments*	2/27/2015		X	

MyReports Enhancement Summary

New Reports and Enhancements since March 2014				
JANUARY 2015	Date	New Report	Enhancement	Advisory Group Priority
Distribution of Payroll Expense Report - *Changed default date to Last Closed Month* - *Added Home Dept ID* - *Added Show Detail Columns* - *Added ability to display chartfield codes/descriptions* - *Added hyperlink to **Employee Lookup Report***	1/21/2015		X	X
Transaction Detail Report - *Added ability to save additional fields in MyFavorites*	1/24/2015		X	
Program Portfolio Report	1/29/2015	X		X
DECEMBER 2014	Date	New Report	Enhancement	Advisory Group Priority
Performance Tuning *(50% or more faster)* - *Faculty Portfolio Monthly Report* - *MyPortfolio Report* - *Asset Management Report* - *Net Position Report* - *Employee Appointment Report*	12/15/2014		X	
All Reports - *Added short description of each report to landing pages*	12/19/2014		X	
Support Tab - *Added additional information and hyperlinks*	12/19/2014		X	
Job Aid - *Added Recommended Reports by Role*	12/19/2014		X	
NOVEMBER 2014	Date	New Report	Enhancement	Advisory Group Priority
Net Position Report - *Added Show Flexfield option* - *Added Show 2 Decimal Places option* - *Added descriptions to Parent/Award ID* - *Added Unformatted Data output option*	11/14/2014		X	X
UPlan Forecast - *Automated file transfer* - *Increased frequency to monthly*	11/14/2014		X	
Job Aid - *Enhanced Portfolio Projections to an interactive job aid*	11/24/2014		X	
OCTOBER 2014	Date	New Report	Enhancement	Advisory Group Priority
Transaction Detail Report - *Added Account Level C sort option* - *Enhanced Reference data* - *Rearranged report columns* - *Added Unformatted Data output option*	10/1/2014		X	X
MyPortfolio Report - *Moved Projections to separate section of report* - *Changed default to not Show PI Details*	10/1/2014		X	X
Data Warehouse - *Added Medical Center Alt Account*	10/4/2014	X		
Organization Report - *Added ability to Include or Exclude Open Periods*	10/22/2014		X	
Balance Sheet Report	10/31/2014	X		

MyReports Enhancement Summary

New Reports and Enhancements since March 2014				
SEPTEMBER 2014	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
PO Lien Balance Report	9/3/2014	X		
Current Year vs. Prior Year Actuals Comparison Report	9/3/2014	X		
Transaction Detail Report - *Added Journal ID filter* - *Added Journal Preparer Name filter* - *Added Show Detail Columns checkbox filter*	9/3/2014		X	X
Distribution of Payroll Expense - *Added ability to run report by Accounting or Pay Period*	9/30/2014		X	X
Control Point Reports Tab - *Added link to FAS Financial Reports*	9/30/2014		X	
AUGUST 2014	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Inquiry Reports - *Chart of Accounts related information* - *Contracts & Grants - F&A Base Codes & Rates* - *HR Payroll & Benefits related information* - *Award Information*	8/29/2014	X		X
JUNE 2014	**Date**	**New Report**	**Enhancement**	**Advisory Group Priority**
Asset Management Report	6/30/2014	X		
Fund Group Report	6/30/2014	X		
Gift & Endowment Income Report	6/30/2014	X		
Mission Based Report	6/30/2014	X		
Project Summary Report	6/30/2014	X		
Project Use Report	6/30/2014	X		
All Reports - *Enhanced type-ahead functionality on filter page*	6/30/2014		X	