

Introduction to UR Budget

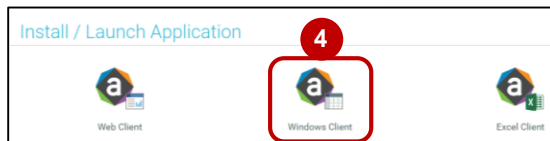
Accessing UR Budget

UR Budget is a web-based application, accessed from any web browser. It works best in Internet Explorer 9 or higher. To access UR Budget, perform these steps:

1. Go to rochester.edu/adminfinance/urbudget
2. Select **Logon** from the submenu
3. Click the **Log In** button

Note: Log in with your NetID credentials if prompted

4. Launch the **Windows Client**



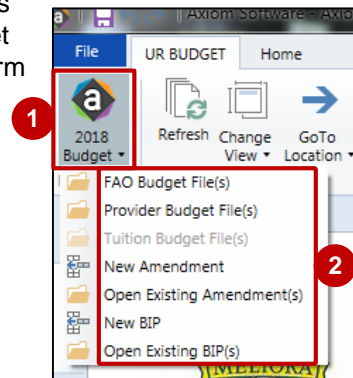
Note: A system download is required the first time you log into the system to install the client

5. UR Budget will open to the home page

Viewing a Plan File

Once in UR Budget, all work is started through the UR Budget tab. To open a plan file, perform these steps:

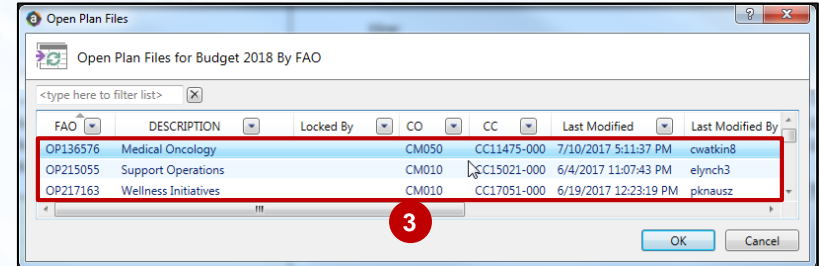
1. From the UR Budget tab, click the **20XX Budget** button
2. Select desired plan file type



3. Select the plan file, then click **OK**

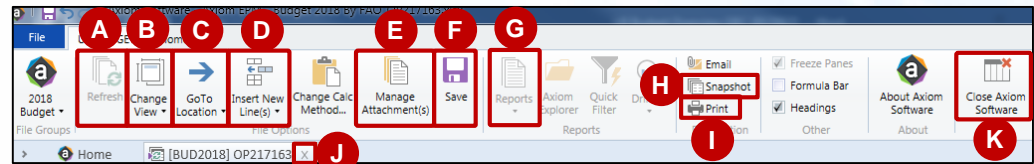
Note: You will only see the plan files you have access to

4. The selected plan file opens



Using the UR Budget Ribbon

The UR Budget ribbon has features to help you zero in on only the data you need. Refer to the screen shot below for an overview of each feature.



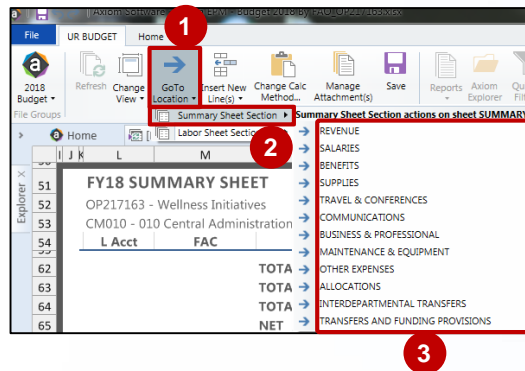
| Callout | Button Name | Description |
|---------|----------------------|--|
| A | Refresh | Update Report or plan file data by clicking Refresh |
| B | Change View | Filter to see only the information you need |
| C | GoTo Location | Quickly jump to a specific section of the plan file |
| D | Insert New Line(s) | Add a new line to a specific section of the plan file |
| E | Manage Attachment(s) | Upload, view, edit, or delete attachments that support budget development work |
| F | Save | Save updates often to avoid losing data |
| G | Reports | Access reports related to the plan file |
| H | Snapshot | Export a copy of the plan file in Excel format Note: Excel files cannot be imported into UR Budget |
| I | Print | Print a copy of the plan file |
| J | X | Close the plan file Note: Be sure to close all files before exiting UR Budget |
| K | Close Axiom Software | Exit UR Budget when you're done with your session |

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Locating a Specific Section

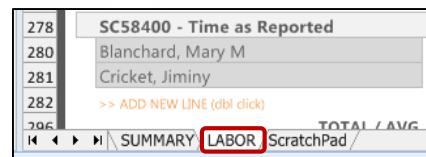
GoTo Location allows you to quickly jump to a specific section in a plan file. To go to a specific section, perform these steps:

1. Click **GoTo Location** button
2. Hover over the desired sheet
3. Select desired section to view



Viewing Multiple Worksheets

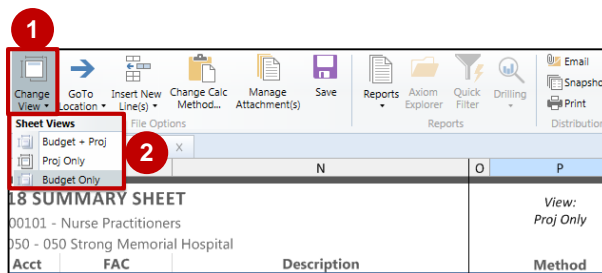
Most plan files contain multiple worksheets. To view the worksheets in a plan file, click the desired worksheet tab.



Changing Views

Views allows you to eliminate the clutter in large files and focus on the columns you need to see. To change views, perform these steps:

1. Click **Change View**
2. Select the desired view to filter results



Color Coding

| Color | Meaning |
|--------------------------|---------------------------------------|
| White or grey background | Non-editable cell |
| Yellow background | Editable cell |
| Orange background | Editable calculated field |
| Orange text | Hyperlink, or double click to add row |

Note: In yellow cells, use signed values when entering dollars and input revenue as a negative amount

| | | |
|-------------------------------|-----------|-----------|
| Supplies Medical Other | 1,070,675 | 1,070,675 |
| Cardinal Health | | 470,675 |
| MedAssets | | 260,000 |
| Thermo Fisher | | 340,000 |
| >> Double Click to Add Detail | | |

Free Text Best Practices

Some fields in a budget file allow for free text comments, descriptions, or memos. Follow these guidelines when typing free text:

- Comments & Memos: Limit to 50 characters and refer to attachments that support entries
- Descriptions: Include department and codes to help reviewer identify file quickly

Resources

For more information and additional help, refer to the following:

- UR Budget website: rochester.edu/adminfinance/urbudget
- Help Desk:
 - ➔ UnivIT: 275-2000, [UnivITHelp@ rochester.edu](mailto:UnivITHelp@rochester.edu)
 - ➔ URM: 275-3200, [helpdesk_ISD@ urmc.rochester.edu](mailto:helpdesk_ISD@urmc.rochester.edu)
- UR Financials login: rochester.edu/adminfinance/urfinancials/workday-login
- UR Financials website: rochester.edu/adminfinance/urfinancials