How To Access Budget Reports

If you have any issues accessing these reports, please contact UmichFinancialSystems@med.umich.edu

Hello,

Some screen shots to locate the canned budget report. The first section are screen shots of the how to navigate to the Web based reports. The second section is how to navigate to the Smart View Reports. Please let us know if you have any trouble accessing these reports. Thank you.

In Workspace (web based)

1) Sign on to Workspace and click on “Explore”.

2) Navigate folders to “Budget and Forecast” and select “Non-Cohort”.

![Image](image-url)
How To Access Budget Reports

3) The reports are as noted below. When you select each report it will ask you to define your Point of View (POV). Please note the reports have been updated for our new FELs (AFSCME and House Officers and their corresponding FTE FEL)

4) Please note if you have a new user they may receive an error message when they first try to access the reports. If so, remember this is an easy adjustment to set up the reports for viewing. Select “File” then “Preferences”
How To Access Budget Reports

5) Select “Financial Reporting”
How To Access Budget Reports

6) Toggle to “On” for the User Point of View and click OK

7) Cycle back to step 2 above and your view should be set.

Smart View

1) Sign onto Smart View and use the drop down menu to select “Reporting and Analysis Framework”
How To Access Budget Reports

2) Expand https://findatamgr.mem.umich.edu/raframework/ and select “UMHS Financial Reports”

3) Expand “Budget and Forecast” folder and select “Non-Cohort”
How To Access Budget Reports

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