Financial Toolbox - Getting Started

Financial Toolbox

Enter your 4 digit subprogram and department, including leading zero. For an entire subprogram, enter the 2 digit subprogram followed by a *

- Run Active Cost Object List for Subprogram Department L
- Run 5 Year Trend for Subprogram Department Listed Abo
- Run Service Center Tolerable Threshold Report for Subpro
- Run Foundation Balances for Subprogram Department Lis
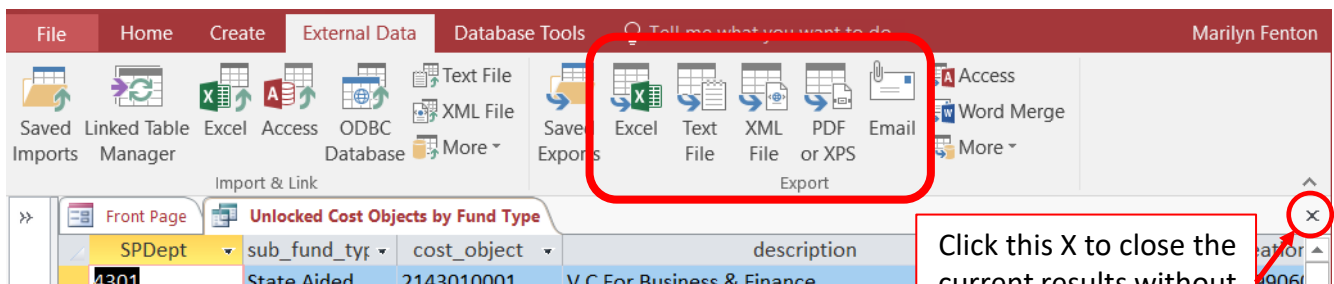- Open Foundation Reimbursement Menu

Why use the Toolbox?

- ❑ It consolidates data that is difficult to pull together from SAP, such as active cost objects and service center reports.
- ❑ It includes 5 year trend data with all types of funds in one report.
- ❑ It simplifies Foundation reimbursements, prepopulating the Request for Transfer From Foundation Funds form with either payroll or operating expenses.

To get the toolbox, go to: https://businesscentral.unl.edu/hr-and-financial-toolboxes/ If you do not have administrative rights on your computer, you will need to ask your IT support person for help.

➤ The Toolbox is designed to pull data by subprogram and department so the front page prompts for that. You can run reports for your specific department or an entire subprogram by putting an asterisk after your subprogram – 43*

➤ If the results are data instead of a formatted report, you can copy/paste into Excel or explore the External Data tab for other options, including saving as a pdf or emailing the results directly from the Toolbox (see below)

➤ The Foundation Reimbursement function pulls SAP data for either payroll or operating expenses for a specific WBS and date range. There is also an option to process a One Time Award, which prefills with appointment data for the person you are paying.

Don't be afraid to try different options. You can't hurt anything!

Click this X to close the current results without closing the database.

⚠ The Toolbox is updated each fiscal year so look for an email with a new download link each August.