
Standard Operating Procedure: **Requesting eReports Access**

Unit(s) Responsible: **Financial Reporting, Finance**

Effective Date: **March 14, 2017**

Description

eReports is the University's Enterprise Reporting System used to access various financial and human resources related reports. The following document provides instruction to the University community for requesting access to eReports, as well as information on the various Finance reports available depending on the access level selected.

Definitions

Access Level: The role an individual has in the University determines which reports they can have access to on eReports. There are three (3) levels of access available on eReports - Basic, Intermediate and Advanced.

Process

Providing all required information is supplied at the time of request, eReports access takes approximately five (5) business days.

All eReports accesses are requested via email to askit@yorku.ca or by submitting a ticket directly through Cherwell (<https://askit.yorku.ca/CherwellPortal/ITMain>) by the executive officer, financial officer, or cost centre owner, depending on the fund code (See below). In Cherwell, requests for eReports access (Request a service) fall under Accounts & Access > Administrative & Business > Reporting and Analytics > eReports.

The following information is required in the e- mail.

1. Employee Name
2. Employee ID and valid Passport York user name
3. List of cost centres or financial rollups that access is required
4. Specify whether the requested reports are for Finance and/or Human Resources
5. For Funds 100, 200 and 300 it is necessary to provide the requested access level, i.e.: Basic, Intermediate or Advanced. For a list of reports by level see eReports Access Levels (below).
6. Rolling Budgets (Funds 100, 200 and 300 only) if required. Note: It is a prerequisite to have cost centres/financial roll-ups at the intermediate access level or higher and by default, access will be restricted to these cost centres/financial roll-ups.

Note:

For Funds 400 and 500 access request must come from the cost centre manager or Research Accounting. No one else can make requests for Funds 400 and 500.

For Fund 600 requests must come from the cost centre manager or Treasury department.

Depending on the type of eReports access required, the request is forwarded to Finance, Human Resources or Advancement Services. Once access has been granted a confirmation e-mail is sent to the employee and the initiator will be able to view the updates by logging to Cherwell.

eReports Access Levels

Basic Level Reports <i>(Applies to all funds unless specified)</i>	Intermediate Level Reports <i>(Applies to fund 100, 200 & 300 only)</i>	Advanced Level Reports <i>(Applies to fund 100, 200 & 300 only, unless specified)</i>
<ul style="list-style-type: none"> • Advancement Revenue by Cost Centre • Balance Sheet • Balance Sheet for Endowments (Fund 600 only) • Cost Centre Variance Rollup (Fund 200 & 300 only) • Facilities Service Request Costing • Financial Reporting Structure • Internal Grant (Fund 400 only) • Institutional Advances • Invoice Details • Outstanding PO Commitments • PrintPack • Purchase Order Status • Signing Authority • Statement of Operations • Stores Material Requisition • Telecommunications Statement • Transaction Details 	<p><i>All Basic Level reports <u>plus</u>:</i></p> <ul style="list-style-type: none"> • Budget Entry Spreadsheet • Budget Status • Budget View • Forecast Entry Spreadsheet • Forecast Status • Forecast View • Forecast View-VPA • Load and Finalize Budget & Forecast 	<p><i>All Basic and Intermediate Level reports <u>plus</u>:</i></p> <ul style="list-style-type: none"> • Allocation Bridging Summary (Fund 200 only) • Budget Submission Summary • Planning Budget Accountability (PBA) (Fund 200 & 300 only)