



# Introducing FIORI Launchpad Reporting

*Financial Advisory Services & Training (FAST) Team*

**Connect + Learn**



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## Agenda

- What is FIORI Launchpad Reporting?
- Accessing and Navigating the FIORI Launchpad Reporting Dashboard
- Reports in Decommissioned RPT vs FIORI Launchpad
- Customizing the Dashboard
- Executing and Printing Reports
- Demonstration of the FIORI Launchpad Reporting Application
- Additional Resources

# What is **FIORI** Launchpad Reporting?

- A **web-based application** that replaces the decommissioned RPT instance
- **Enhanced modern design** and **more intuitive and simplified user experience**
- **Select priority reports** are **available 24/7** displaying **live AMS data**
- Includes **financial, HR** and **Research report** (depending on authorization)
- **Available during AMS downtimes** (e.g., the upcoming Fiscal Year End, Holiday Shut Down, Fiscal Month End and pay runs)
- Login using **UTORid**



The official launch of the new reporting solution **Monday, March 22<sup>nd</sup>**



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# Things to Know at a Glance

## What Stays the Same:

- Used **strictly for reporting** (i.e., cannot process or change transaction postings)
- Report **selection screen**
- Report **output, format and functionality**

## What has Changed:

- Display **live AMS report data** in select priority financial, HR and research reports
- **Web based**
- More **intuitive modern user interface**
- Login using **UTORid**

# Accessing and Navigating the FIORI Launchpad Reporting Dashboard

- **AMS reports are accessed through tiles** which enable users to launch reports without having to navigate through the menu.
- **The tiles that are displayed depends on your AMS authorization** (i.e., If you do not see a particular report in AMS, then it will not appear in the FIORI Launchpad Reporting).
- **Click on a tile** to go to the report selection criteria screen.

The screenshot displays the FIORI Launchpad Reporting Dashboard for the University of Toronto. The dashboard is organized into a grid of report tiles. At the top, there is a navigation bar with the University of Toronto logo and a 'Home' dropdown menu. Below the navigation bar, there are four main categories: 'Financial Reports', 'HR Central Payroll Reports', 'HR Reports', and 'RIS Reports'. The 'Financial Reports' category is highlighted with a red box. Underneath, there is a grid of report tiles. The 'Funding: Funds Center or Fund' tile (ZFM1) is highlighted with a red box. Other visible tiles include 'Total Funding Activity' (ZFTR008), 'Funds Center Report' (ZFTR111), 'Month-end Statement of Account' (ZFTR106), 'FM Line Item Report' (ZFIR079), 'Document Display' (FB03), 'Fund Centre Fund Balance Listing...' (ZFTR017F), 'Customer Line Item Display' (FBL5N), 'Vendor Balance Display' (FK10N), 'Monthly PI Report - All Sponsors' (ZFTR091), 'F&S Customer Statement- 2015...' (ZPVR019A), 'Greybook Download and Report' (ZFTR056D), 'Purchasing Documents per Docu...' (ME2N), 'Cost Centers: Actual Line Items' (KSB1), and 'Payroll Distribution Report' (ZHJR\_ZHJR004).



# Reports in Your Dashboard

The **Financial**, **HR** and **Research** reports you see on your dashboard will depend on your AMS authorization.

[Click here for a full list](#) of the **Financial**, **HR** and **Research** reports available on the FIORI Launchpad Reporting application.

# Financial Reports

The screenshot shows the University of Toronto AMS/RPT dashboard. At the top left is the University of Toronto logo and the text 'UNIVERSITY OF TORONTO'. To its right is a 'Home' dropdown menu. Below this is a navigation bar with four tabs: 'Financial Reports', 'HR Central Payroll Reports', 'HR Reports', and 'RIS Reports'. The 'Financial Reports' tab is selected and highlighted with a red border. Below the navigation bar is a grid of report tiles. Each tile contains a report title, a description, and a code. The tiles are arranged in three rows and six columns. The first row contains: 'Total Funding Activity' (ZFTR008), 'Funding: Funds Center or Fund' (ZFM1), 'Funds Center Report' (ZFTR111), 'Month-end Statement of Account' (ZFTR106), 'FM Line Item Report' (ZFIR079), and 'Document Display' (FB03). The second row contains: 'Fund Centre Fund Balance Listing...' (ZFTR017F), 'Customer Line Item Display' (FBL5N), 'Vendor Balance Display' (FK10N), 'Monthly PI Report - All Sponsors' (ZFTR091), 'F&S Customer Statement- 2015...' (ZFVR019A), and 'Greybook Download and Report' (ZFTR056D). The third row contains: 'Purchasing Documents per Docu-...' (ME2N), 'Cost Centers: Actual Line Items' (KSB1), and 'Payroll Distribution Report' (ZHJR\_ZHJR004). The remaining cells in the third row are empty.

| Financial Reports                               | HR Central Payroll Reports              | HR Reports                                  | RIS Reports                                 |   |  |
|---|---|---|---|---|--|
| Total Funding Activity<br>ZFTR008               | Funding: Funds Center or Fund<br>ZFM1   | Funds Center Report<br>ZFTR111              | Month-end Statement of Account<br>ZFTR106   | FM Line Item Report<br>ZFIR079              | Document Display<br>FB03                 |
| Fund Centre Fund Balance Listing...<br>ZFTR017F | Customer Line Item Display<br>FBL5N     | Vendor Balance Display<br>FK10N             | Monthly PI Report - All Sponsors<br>ZFTR091 | F&S Customer Statement- 2015...<br>ZFVR019A | Greybook Download and Report<br>ZFTR056D |
| Purchasing Documents per Docu-...<br>ME2N       | Cost Centers: Actual Line Items<br>KSB1 | Payroll Distribution Report<br>ZHJR_ZHJR004 |   |   |  |

Note: You will only see reports in your dashboard that you currently have access to in AMS/RPT.

# HR Central Payroll Reports

UNIVERSITY OF TORONTO Home ▾

Financial Reports   HR Central Payroll Reports   HR Reports   RIS Reports

|  |                                  |  |                                |   |  |
|--|----------------------------------|--|--------------------------------|---|--|
| Display Posting Runs<br>PCPO                     | Payroll Account<br>PC00_M07_CKTO | Salary Recovery:<br>Print A/R Invoice<br>ZPV12 | Cost Center<br>Funding<br>ZF06 | Infotype Overview<br>for Employee<br>ZHPC00_M02_LINFO | Payroll Distribution<br>Report<br>ZHJR_ZHJR004 |
| Recurring Payments<br>Report<br>ZHSQRECURRINGPAY |                                  |  |                                |   |  |



# HR Reports



Home ▾

Financial Reports

HR Central Payroll Reports

HR Reports

RIS Reports

Infotype Overview  
for Employee

ZHPC00\_M02\_LINFO

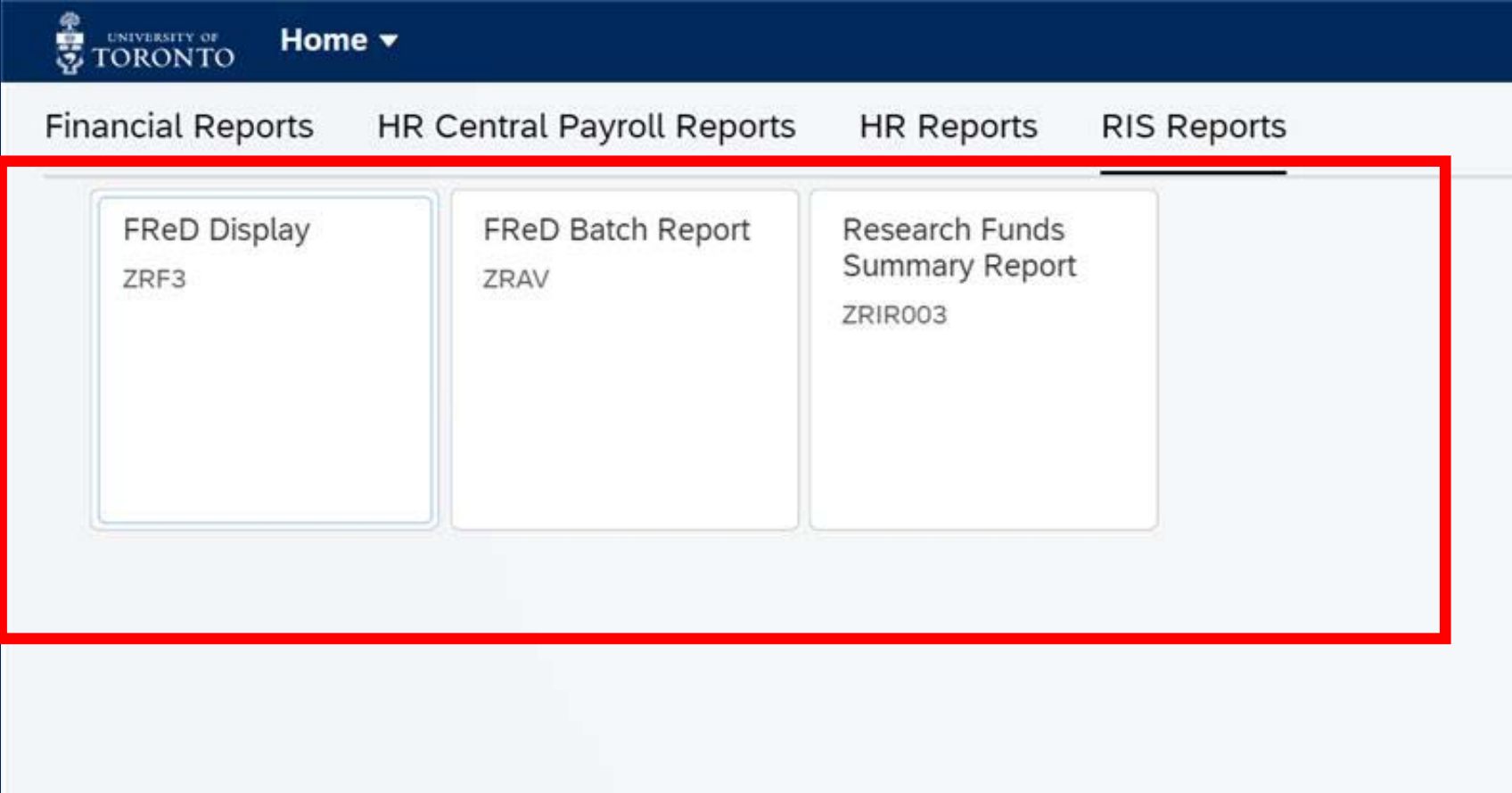
Payroll Distribution  
Report

ZHJR\_ZHJR004

Recurring Payments  
Report

ZHSQRECURRINGPAY

# Research (RIS) Reports



The screenshot displays the University of Toronto website's navigation menu and a highlighted section of reports. The navigation bar includes the University of Toronto logo, a 'Home' dropdown menu, and four main categories: 'Financial Reports', 'HR Central Payroll Reports', 'HR Reports', and 'RIS Reports'. The 'RIS Reports' category is currently selected, indicated by a red underline. Below this, three report tiles are visible, each with a title and a code. The first tile is 'FReD Display' with code 'ZRF3'. The second is 'FReD Batch Report' with code 'ZRAV'. The third is 'Research Funds Summary Report' with code 'ZRIR003'. A red rectangular border highlights the entire content area below the navigation bar.

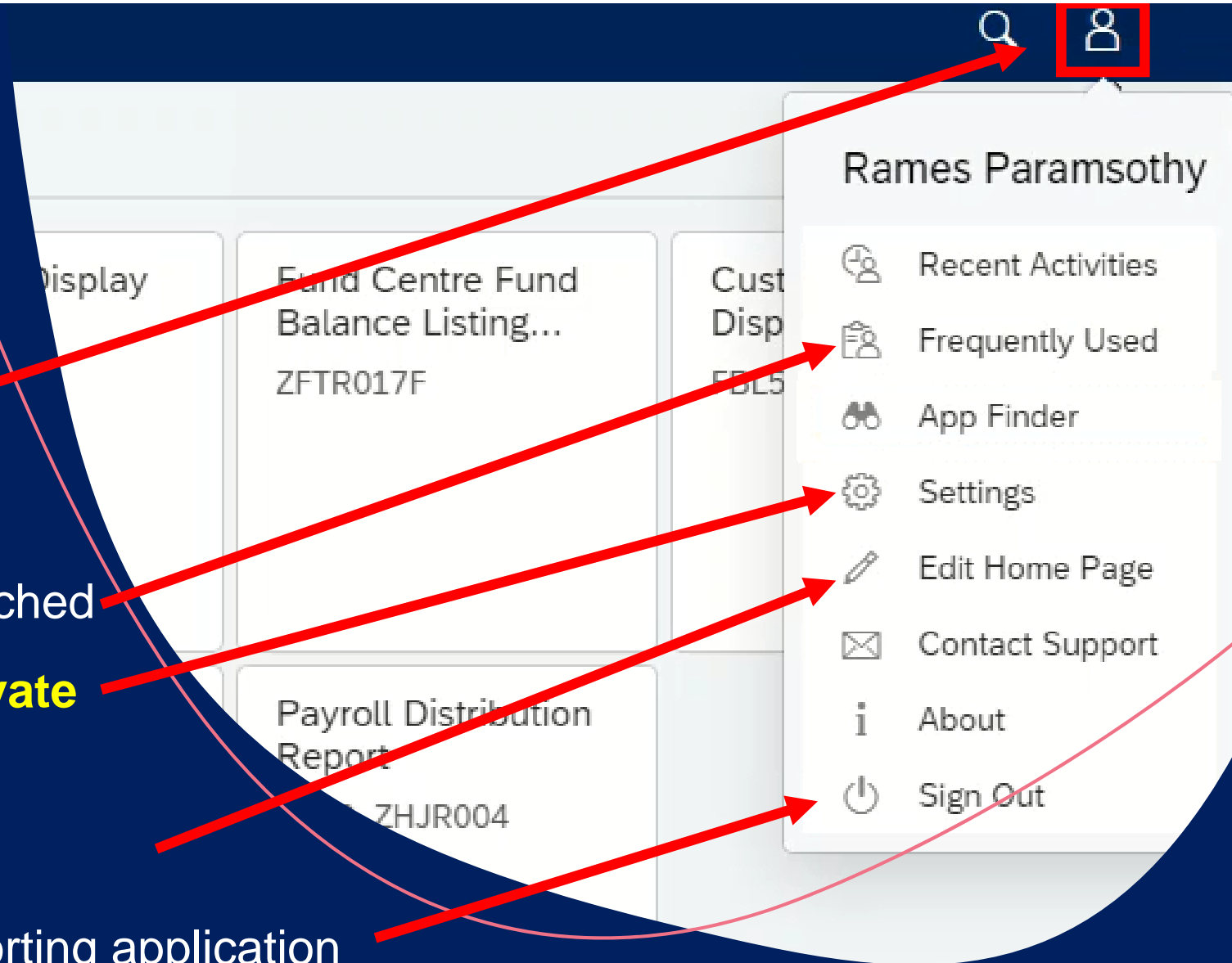
UNIVERSITY OF TORONTO Home ▾

Financial Reports HR Central Payroll Reports HR Reports RIS Reports

|                      |                           |   |
|----------------------|---------------------------|---|
| FReD Display<br>ZRF3 | FReD Batch Report<br>ZRAV | Research Funds<br>Summary Report<br>ZRIR003 |
|----------------------|---------------------------|---|

# Customizing the Dashboard

1. Click the **Profile** icon
2. View a **history of recent reports** launched
3. To change the **colour scheme** or **activate History**
4. **Hide or move** tiles/reports
5. **Log out** of the FIORI Launchpad Reporting application





# Report Selection Criteria

The selection screen criteria has not changed.

## AMS

## FIORI Launchpad Reporting

Funding:Funds Center or Fund

|                |                      |
|----------------|----------------------|
| FM area        | UOFT                 |
| Funds Center   | <input type="text"/> |
| Fund           | <input type="text"/> |
| Budget Version | 0                    |
| Fiscal year    | <input type="text"/> |

Total Fund (Recommendation: Select 'Total Fund' when reporting on a Fund)

Include net totals

---

FBS (Budget data processed up to and including October 2006 month end)

BCS

---

Revenue Received vs Receivable (for Research Restricted fund, Sponsor payment method is Invoicing)


---

Old Report Format



UNIVERSITY OF TORONTO Funding:Funds Center or Fund

Save as Variant... Get Variant... More ▾

|                 |  |
|-----------------|--|
| * FM area:      | J0FT  |
| * Funds Center: | <input type="text"/>   |
| Fund:           | <input type="text"/>   |
| Budget Version: | 0  |
| Fiscal year:    | <input type="text"/>   |

Total Fund (Recommendation: Select 'Total Fund' when reporting on a Fund)

Include net totals

---

FBS (Budget data processed up to and including October 2006 month end)

BCS

---

Revenue Received vs Receivable (for Research Restricted fund, Sponsor payment method is Invoicing)

---

Old Report Format

# Report Output

The report output, format and functionality has NOT changed.

## AMS

## FIORI Launchpad Reporting

Funds Center Report

Show all Commitment Items with hierarchy   Switch to spreadsheet view   Show all Commitment Items w/o hierarchy   Open next level

Funds Center Report

Fiscal Year 2021   Report ZFTR111  
 Funds Center 154654 FAST Training   Instance RPT  
 Include FC Hierarchy   User PARAMRAM  
 FC Hierarchy variant 0000   Date/Time 15.03.2021 12:27:58  
 Include PI FCs X

| Commitment Items          | Original Budget     | Revised Budget      | Commitments       | Actuals           | Commitments+ Actuals | Revenue Variance/<br>Funds Available |
|---------------------------|---------------------|---------------------|-------------------|-------------------|----------------------|--------------------------------------|
| <b>Revenues</b>           |                     |                     |                   |                   |                      |                                      |
| - REVENUE-S               | 92,507.00-          | 92,507.00-          | 0.00              | 30,255.00-        | 30,255.00-           | 62,252.00-                           |
| ADM-USER-F                | 0.00                | 0.00                | 0.00              | 690.00-           | 690.00-              | 690.00                               |
| EXTERN-INC                | 18,000.00-          | 18,000.00-          | 0.00              | 29,565.00-        | 29,565.00-           | 11,565.00                            |
| + RECOVERY                | 74,507.00-          | 74,507.00-          | 0.00              | 0.00              | 0.00                 | 274,507.00-                          |
| <b>Total Revenues</b>     | <b>92,507.00-</b>   | <b>92,507.00-</b>   | <b>0.00</b>       | <b>30,255.00-</b> | <b>30,255.00-</b>    | <b>262,252.00-</b>                   |
| <b>Expenditures</b>       |                     |                     |                   |                   |                      |                                      |
| - EXPENSE-S               | 1,022,875.00        | 1,241,068.37        | 842,883.40        | 50,950.74         | 895,834.14           | 395,234.23                           |
| ^ EXPENSE-S               | 0.00                | 18,300.00-          | 0.00              | 0.00              | 0.00                 | 18,300.00-                           |
| + COMPENS-S               | 63,726.00           | 94,434.00           | 839,866.84        | 1,048.51          | 841,866.84           | 92,518.65                            |
| + EQUIP-S                 | 46,350.00           | 46,350.00           | 0.00              | 5,250.80          | 5,250.80             | 41,099.20                            |
| + OVERHEAD-S              | 15,916.00           | 15,916.00           | 0.00              | 0.00              | 0.00                 | 15,916.00                            |
| + SUPPL-S                 | 72,483.00           | 78,268.37           | 3,016.56          | 27,470.35         | 30,486.91            | 147,781.46                           |
| + TRAVEL-S                | 24,400.00           | 24,400.00           | 0.00              | 8,181.08          | 8,181.08             | 16,218.92                            |
| <b>Total Expenditures</b> | <b>1,022,875.00</b> | <b>1,241,068.37</b> | <b>842,883.40</b> | <b>50,950.74</b>  | <b>895,834.14</b>    | <b>495,234.23</b>                    |

Funds Center Report

Show all Commitment Items with hierarchy   Switch to spreadsheet view   Show all Commitment Items w/o hierarchy   Open next level   More >

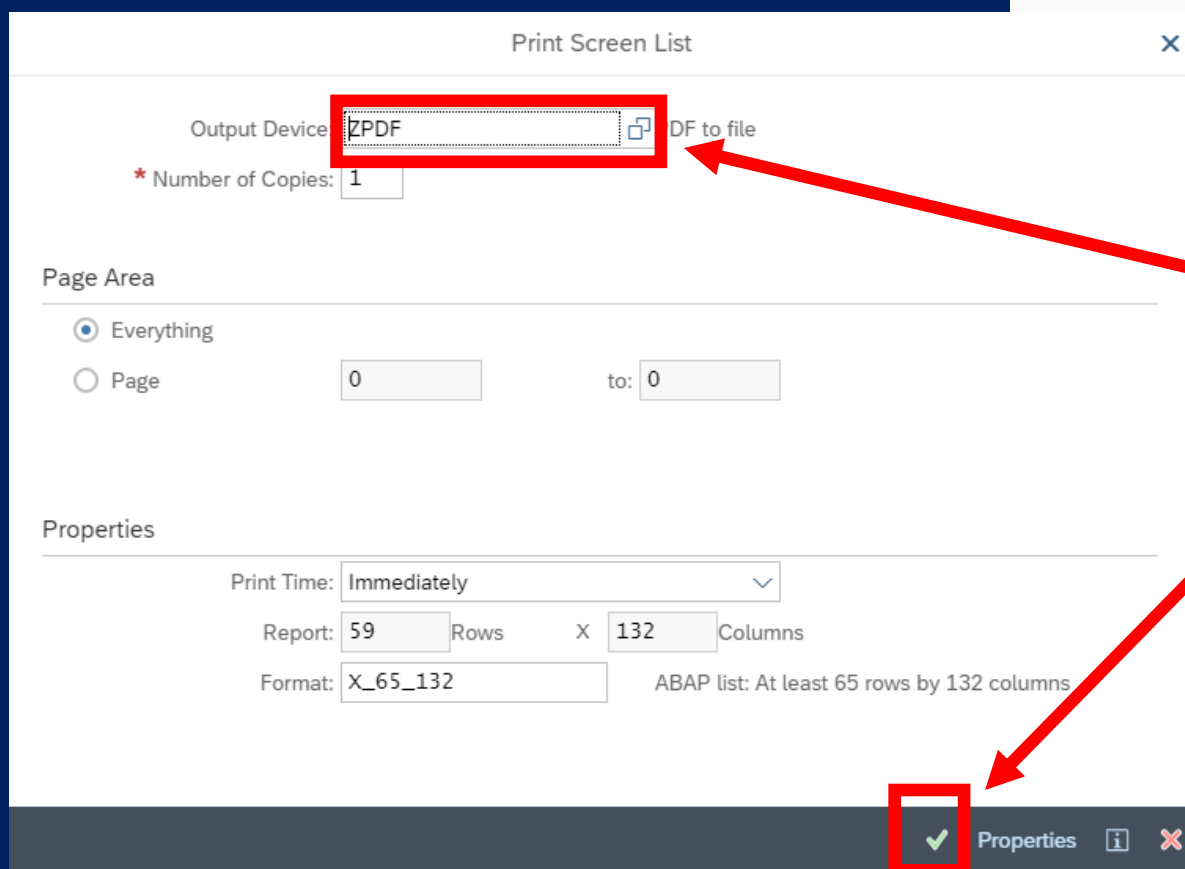
Funds Center Report

Fiscal Year 2021   Report ZFTR111  
 Funds Center 154654 FAST   Instance QS1  
 Include FC Hierarchy   User PARAMRAM  
 FC Hierarchy variant 0000   Date/Time 15.03.2021 13:57:20  
 Include PI FCs X

| Commitment Items          | Original Budget     | Revised Budget      | Commitments       | Actuals           | Commitments+ Actuals | Revenue Variance/<br>Funds Available |
|---------------------------|---------------------|---------------------|-------------------|-------------------|----------------------|--------------------------------------|
| - REVENUE-S               | 92,507.00-          | 35,007.00-          | 0.00              | 53,005.00-        | 53,005.00-           | 82,002.00-                           |
| ^ REVENUE-S               | 0.00                | 42,500.00-          | 0.00              | 0.00              | 0.00                 | 42,500.00-                           |
| ADM-USER-F                | 0.00                | 0.00                | 0.00              | 690.00-           | 690.00-              | 690.00                               |
| + EXTERN-INC              | 18,000.00-          | 18,000.00-          | 0.00              | 52,315.00-        | 52,315.00-           | 34,315.00                            |
| + RECOVERY                | 74,507.00-          | 74,507.00-          | 0.00              | 0.00              | 0.00                 | 74,507.00-                           |
| <b>Total Revenues</b>     | <b>92,507.00-</b>   | <b>35,007.00-</b>   | <b>0.00</b>       | <b>53,005.00-</b> | <b>53,005.00-</b>    | <b>82,002.00-</b>                    |
| <b>Expenditures</b>       |                     |                     |                   |                   |                      |                                      |
| - EXPENSE-S               | 1,222,875.00        | 1,222,687.37        | 282,842.40        | 107,958.11        | 290,800.51           | 936,886.86                           |
| ^ EXPENSE-S               | 0.00                | 12,500.00-          | 0.00              | 0.00              | 0.00                 | 12,500.00-                           |
| + COMPENS-S               | 163,726.00          | 175,253.00          | 0.00              | 706,422.88        | 706,422.88           | 868,830.12                           |
| + EQUIP-S                 | 46,350.00           | 46,350.00           | 0.00              | 4,858.34          | 4,858.34             | 41,491.66                            |
| + FURNIT-S                | 0.00                | 0.00                | 10,341.00         | 2,585.25          | 12,926.25            | 12,926.25-                           |
| + OVERHEAD-S              | 15,916.00           | 15,916.00           | 0.00              | 0.00              | 0.00                 | 15,916.00                            |
| + SUPPL-S                 | 372,483.00          | 378,268.37          | 255,001.40        | 277,710.12        | 532,711.52           | 154,443.15-                          |
| + TRAVEL-S                | 24,400.00           | 24,400.00           | 17,500.00         | 16,381.52         | 33,881.52            | 9,481.52-                            |
| <b>Total Expenditures</b> | <b>1,222,875.00</b> | <b>1,222,687.37</b> | <b>282,842.40</b> | <b>107,958.11</b> | <b>290,800.51</b>    | <b>936,886.86</b>                    |

# How to Easily Display Reports in PDF

1. Generate the report
2. Click the **Print** icon (🖨️) or button



3. Type "**ZPDF**" in the Output Device
4. Click **Continue**
5. The report will appear in PDF format in a separate tab in your browser.

# Executing Reports

UNIVERSITY OF TORONTO **Funds Center Report** 🔍 👤

Save as Variant... Get Variant... More ▾ Exit

Selection Criteria

\* FM Area:  🔗

\* Fiscal Year:

For Funds Centers

Funds Center:

Include FC Hierarchy  Hierarchy Var

OR

Funds Center Groups:  🔗

Funds Center Classification:  to:  🔗

Including Funds Center:  to:  🔗


Excluding Funds Center:  to:  🔗

PI accounts  Include  Exclude  Only

For Commitment Items

Commitment Items:  to:  🔗

Include CI Hierarchy

**Click to Execute** 

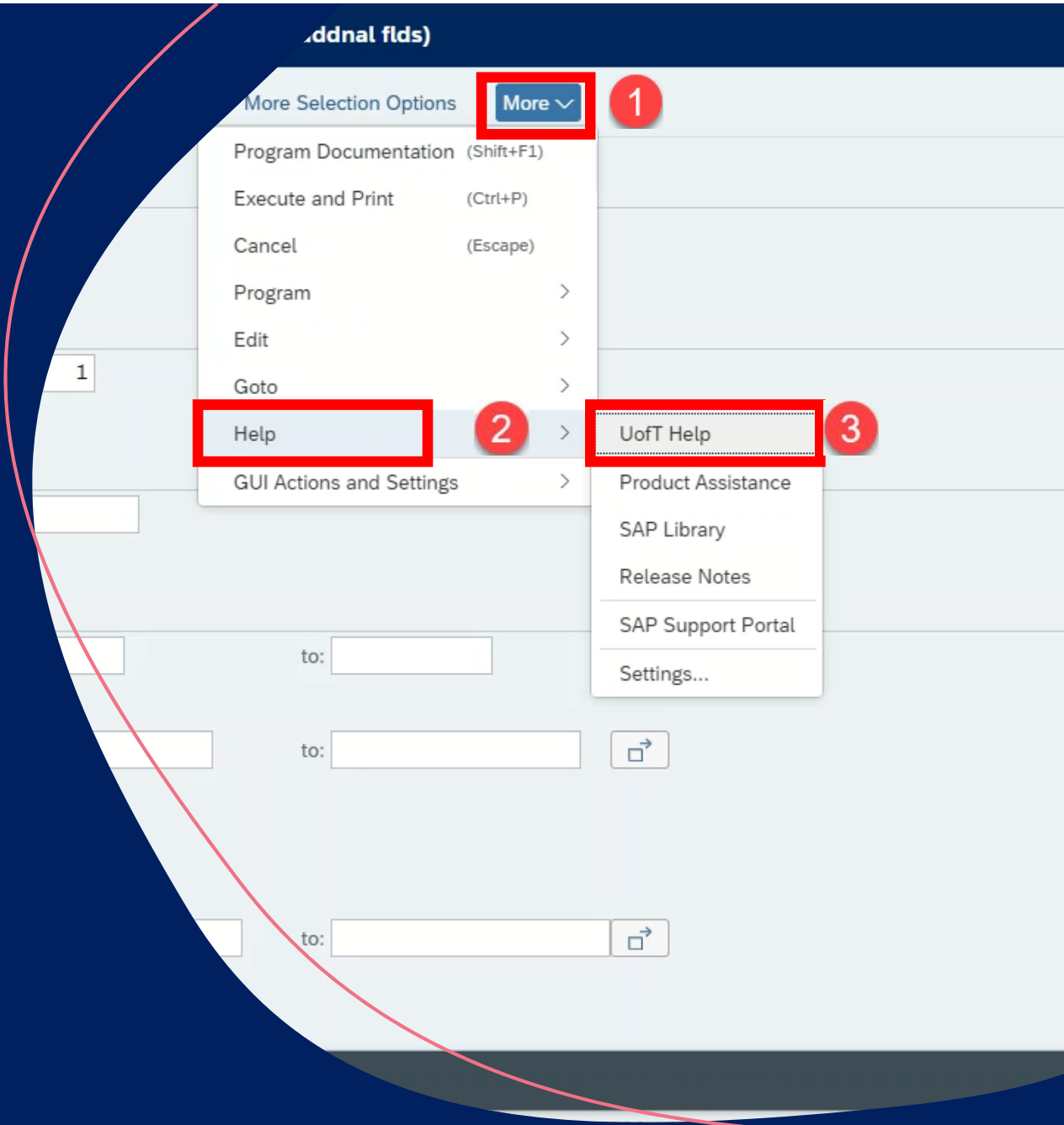
**Execute** 🔴

# Accessing FAST Reference Guides and Simulations for Financial Reports

Once you launch a report, you can access reference guides to assist with generating the report.

To access the reference material:

1. Click the **More** dropdown
2. Click **Help**
3. Select **UofT Help**







# Where can I Learn More?

## FIS

For detailed articles related to the FIORI Launchpad Reporting application, please visit our [Documentation & Support page](#).

## HRIS

Please visit the [HR Systems Training & Support Centre](#)

## Research

Please visit the [How to Access & Understand Research Reports, Including RIS site](#).



# Who do I Contact for Support?

If you have any questions/issues, please contact:

- **Financial reports (FIS):** your [FAST Team Representative](#) or email [fast.help@utoronto.ca](mailto:fast.help@utoronto.ca)
- **HRIS report:** submit a ticket via [uoft.me/esc](https://uoft.me/esc)
- **Research (RIS) reports:** email [ris.help@utoronto](mailto:ris.help@utoronto)

