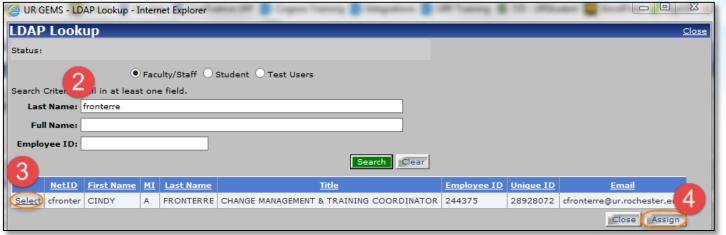# URGEMS updates - QRC

The URGEMS application has recently been updated.  This Quick Reference Card (QRC) has been created to outline the general changes throughout the system. Users will notice these changes on associated screens listed in this guide.

- Employee Lookup – allows users who have appropriate security to add employee information by accessing standard employee data from the University's Lightweight Directory Access Protocol (LDAP) system.  This promotes consistency and efficiencies when adding employees.
- Request for Payment (F4) form Upload (excel) – easily upload Request for Payment information from the F4 form to URGEMS using the Excel version.
- Employee Expense Report Upload (excel) – easily upload Employee Expense Report information from the F3 form to URGEMS using the Excel version.

## Employee Lookup

1. Within the *Update Employee* screen (Salary>Employee>Details Tab) is the **Select from LDAP** link option which will add employee information to the Update Employee fields. Select this link

2. Within the LDAP Lookup screen search for an employee by name, or ID from the LDAP system.  Narrow your search by using one of the radio buttons; Faculty/Staff, Student.

3. Select the appropriate user from the search results

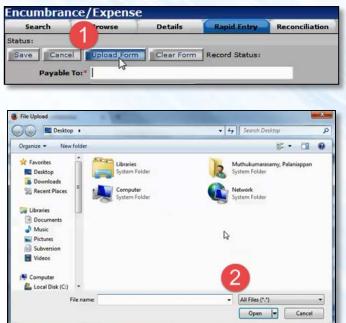4. Choose the **Assign** button to place the employee's information within the Update Employee Screen

# URGEMS updates - QRC

The URGEMS application has recently been modified based on user feedback. This Quick Reference Card (QRC) has been created to assist in increasing the awareness of these changes.

## Request for Payment RFP (F4) form Upload

1. Within the *Encumbrance/Expense* screen, Rapid Entry tab (Non-Salary>Encumbrance> Rapid Entry Tab) is the **Upload Form** button

2. The *File Upload* window will pop up next.
   Type in or browse to the location of the **Request for Payment RFP (F4)**, or **Employee Expense Report Upload** <u>Excel</u> form within the file management system.
   Once the file is located, select the **Open** button. This will add the Spend Categories, FAOs and amounts to the Encumbrance/Expense Rapid Entry screen. Percentages will automatically be calculated within URGEMS

3. Review the data imported and make any additions/changes to the Encumbrance/Expense Rapid Entry screen

4. When done, select the **Save** button in the upper left corner of the Encumbrance/Expense Rapid Entry screen to save the entry.

| | FAO Yr | Category | FAO | FAO Stat | Dept Attr | Percent | CS | Cost Share Acct | Amount |
|---|---|---|---|---|---|---|---|---|---|
| Select | | SC ▾ 49650 | OP ▾ 211138 | A ▾ | | 67 | ☐ | | 100.00 |
| Select | | SC ▾ 49450 | OP ▾ 211138 | A ▾ | | 33 | ☐ | | 50.00 |

Note: This upload process <u>only</u> works with Microsoft Excel form versions

**UR** Financials

**UNIVERSITY** *of* **ROCHESTER**