Updated 6/21/18
Department of Women & Gender Studies

Checking Speedtype Balances / Running Financial Reports

General Notes

- You will need to be **on campus** or **connected via VPN** (from off campus) to access reporting capabilities.
- After you run the report(s) the first time, you can **SAVE the reports** and easily run them again at any time. Let me know if I can help you save your own customized reports.

Note about Partnered Speedtypes:

For most of your speedtypes (but NOT the $XQK), there are actually TWO "**partnered**" speedtypes that operate behind the scenes like a **checking/savings account**. In the 8-digit speedtype #, one starts with "110" (checking / Fund 10) and the other with "172" (savings / Fund 72), but the remaining digits do NOT match. They will have the same title, such as "[*FacultyName]* Research." Generally, you should use the "110" (checking) speedtype to pay expenses. If expenses occur in the "fund 10" (checking), there would be auto-transfers to pay them from the savings when needed. Your main concern for partnered speedtypes is that you **add the two balances together to know how much total available funding you have**.

INSTRUCTIONS to run reports to check speedtype balances (Updated 6/25/18):

1) Log in to MyCUInfo and go to the **CU Resources** tab
2) At the right of the first row of TILES, click **Quick Links** then choose **CU-Data**.
3) Select **Team Content**, select **Finance**, then choose "**m-Fin Speedtype Summary**"
4) In the box near the upper right for **Org**/Orgnode, enter **10220**
5) Then, in the **SPEEDTYPE** Box on the left, type [***your last name***] into the keyword search box, select **Options**, select "**Contains any of these keywords**," then press **Search**
6) Your speedtypes should appear in the Results field – **Select all** of them and click on the **Insert** arrow to move them to the Choice Box. The list will include some older speedtypes that may still be active. You can choose only the ones you want, if you know which ones you wish to look at. **Please see the note about partnered speedtypes**.
7) Scroll down to the bottom and select "**Finish**"
8) If you wish to **SAVE** the report (so you won't have to type all the above every time), in the upper LEFT corner, click the "**Add this report**" icon (looks like floppy disk) and click "**Save Report as Report View**." You will assign the report a customized name and choose "**Select My Folders**" for the location. Next time, you will go to "**My Content**" instead of "Team Content" in step 3.

The resulting report will show the current balances of the speedtypes. If there are **two "partnered" speedtypes that have the same name**, you **add the balances together** to get the total available balance (see note above).

You may run a detail report showing all individual **transactions** by following the same instructions and choosing the report "**m-Fin Financial Detail**" in Step 3.