



ADDY NOTE



FINANCIALS
REFERENCE
DATABASE

ATTENTION:

This Addy Note is a procedural resource for the UCF Financials Reference Database, which only contains data prior to July 1, 2022.

Viewing Related Content

UCF Financials has been updated with a **Related Content** feature that allows you to easily view additional vendor, purchase order, journal, and report information from select pages, including the following:

- Review PO Information
- Review Vendor
- Review Journal Entries
- Various PCard Reconcile Statement Pages
- View Budget Details on Valid Journals.

The **Related Content** feature helps buyers, Accounts Payable (AP) personnel, and departmental requesters and approvers view multiple layers of information on one page. Examples of uses for the **Related Content** feature including the following:

- While buyers are reviewing purchase orders, they can also review information about the requestors.
- Departmental approvers viewing vendor information can determine if the vendors have any pending payments.
- View additional Journal Entry information such as Journal Editor and budget error descriptions.
- When reviewing a travel PO with multiple lines that need to be associated with a PCard transaction, an approver can use **Related Content** to identify the appropriate line and to key information about the PO such as PO and PO line status prior to tying the line to the transaction.

Note: When a page displays a **Related Content** link at the top, it means that related content has been defined for that page. Look for this link on other pages as more related content becomes available.

Note: The **Related Content** topics in this example are specific to **Supplier Information**. Other UCF Financials processes such as journal creation or purchase order review will display topics that are relevant to that particular process in the dropdown list under **Related Content**. Those topics may be accessed in the same manner as described in this Addy Note.



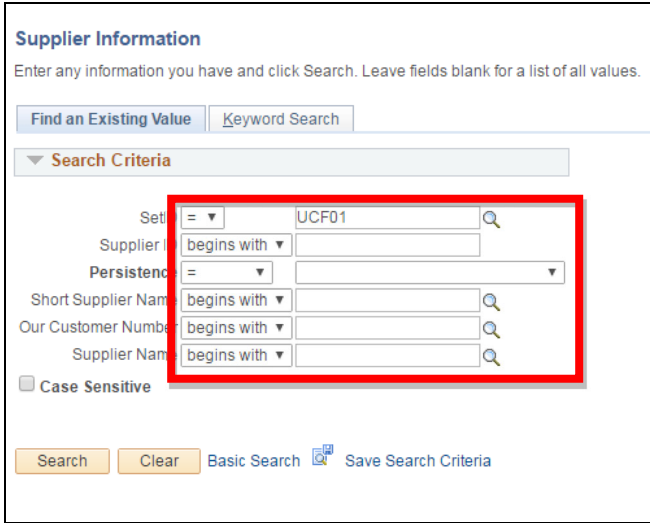

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Step	Action
1.	Navigate to: Main Menu > Suppliers > Suppliers Information > Add/Update > Supplier
2.	Enter criteria in the appropriate field(s) to help you locate the supplier. 
3.	Click the Search button. Note: If there is more than one supplier, select a supplier from the search results.
4.	Select the Related Content link (or the dropdown arrow next to it). 



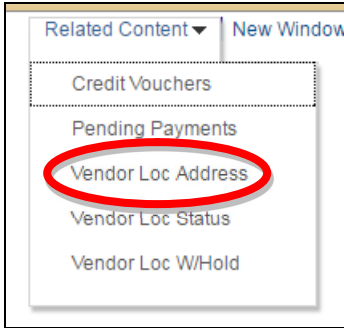
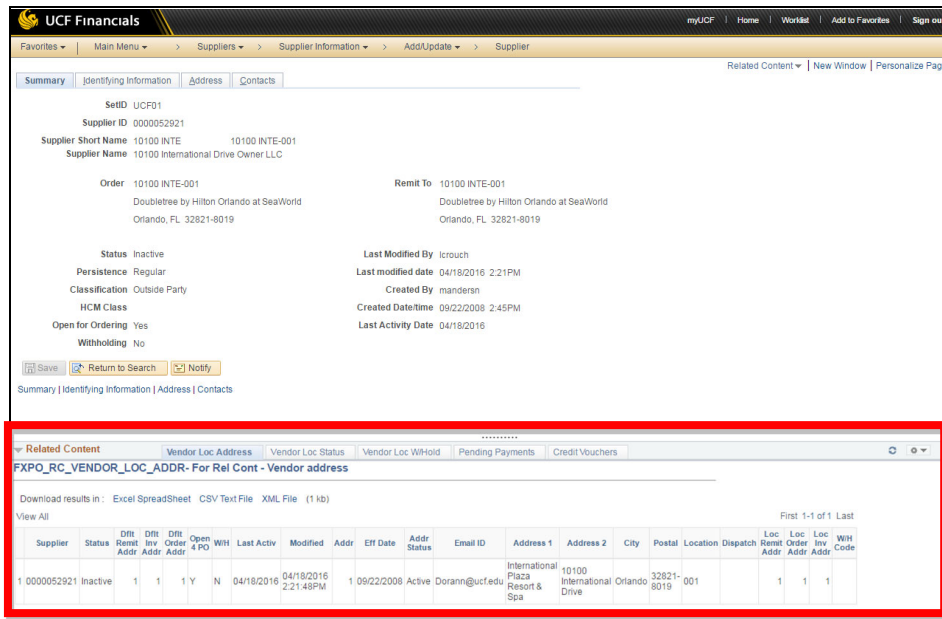
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Step	Action
5.	<p>Select Vendor Loc Address from the dropdown list.</p>  <p>Note: As shown next, a horizontal panel will display at the bottom of the page with information on the supplier location address.</p> 
6.	<p>Use the right and left arrows on your keyboard to horizontally scroll and view more data.</p>



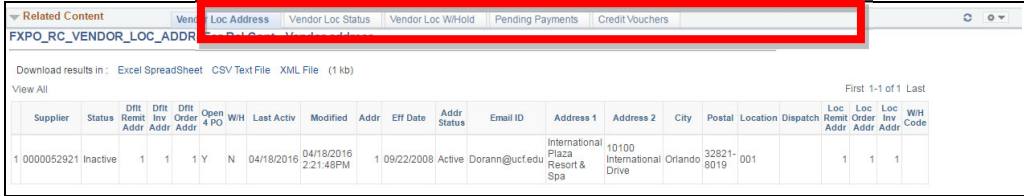
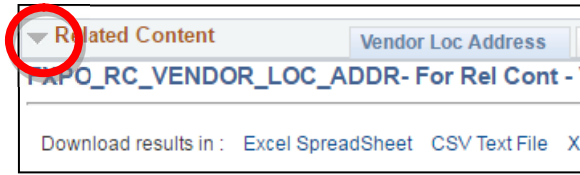
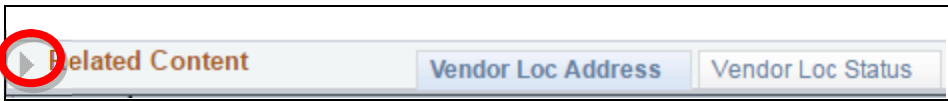
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Step	Action
7.	<p>Click the other tabs to view more related content.</p> <p>Note: You can also access this data from the Related Content dropdown list at the top of the page.</p> 
8.	<p>Click the Collapse (▼) arrow to hide the Related Content panel.</p> 
9.	<p>Click the Expand (▶) arrow to show the Related Content panel.</p> 
10.	<p>If you need to view the Related Content in a separate spreadsheet, click the Excel SpreadSheet link. This will allow you to open or save the currently displayed data as a Microsoft Excel spreadsheet.</p> 