

OSR Fair 2016: CER

Move UP to CER

Things you will ❤️ about OBI CER

- to details & across reports
- dashboard reports
- to Excel
- Run reports over
- like functionality
- Consistent names
- faster than equivalent RM3 report

Expenditure Balance Details RM3 285

Business Process:
Comparing budget to actual expenditures for fiscal year to date or project to date

Business Use:

- Analyze difference between budget and actual expenses to date
- See projected remaining balance with hard commitments
- View the actual expenditures that are affecting large variances from budget

Report links: EXP 109, EXP 275, EXP 276, EXP 277, EXP 278, EXP 281, EXP 285, BGT 211

Data download: EXP 279

NEW e.g. PI Burn Rate

NEW Actual to Actual

EXP 279 JNL 230

EXP 279A JNL 231

EXP 280

Expenditure Details RM3 279

Business Process:
Expenditure reporting, reconciliation and review

Business Purpose:

- Find expenditure transaction details
- Categorize and subtotal by attributes of the expenditure and PTA
- Efficiently sort, subtotal, and group by expenditure and PTA attributes
- Total expenditures by organization
- Actual expenditures by Expenditure Type, Expenditure Category, Award Type, Award or SPO Number
- Actual expenditures by Task Manager or Task / Award Owner (PI)

Drill down to transaction details formerly found in:
LABOR 168, LABOR 169, LABOR 170, LABOR 172, LABOR 173, LABOR 247, IOU 265, IOU 266, IOU 267, IOU 269, IOU 268, PCARD 187, TCARD 301, JNL 230, JNL 231

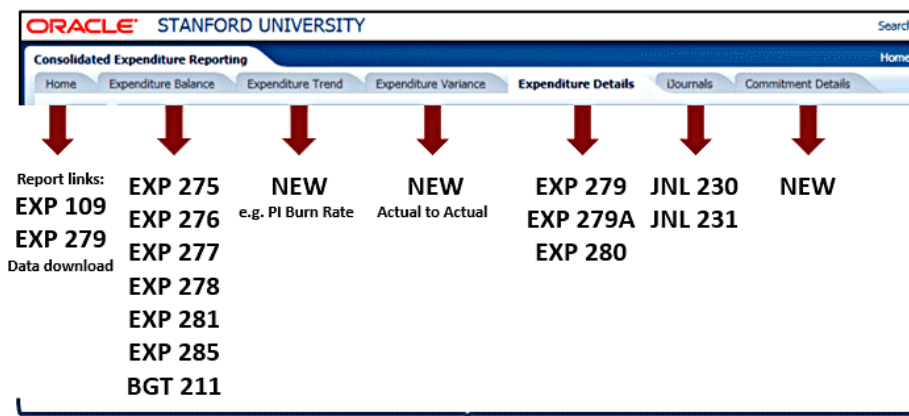
Resources and References

- About OBI <http://tinyurl.com/About-OBI>
- RM3 to OBI Crosswalk and Task Mapping:
http://web.stanford.edu/group/fms/fingate/finsystem/obi/res/crosswalk_taskmap.html
- OBI Financial Reporting Quick Start Guide
http://web.stanford.edu/group/fms/fingate/docs/obi/OBI_Quick_Start_Guide.pdf
- Step-by-Step Instructions for CER
http://web.stanford.edu/group/fms/fingate/docs/obi/CER_How_To_Business_Question.pd
- Training <http://web.stanford.edu/group/fms/fingate/finsystem/obi/training.html>
- More on the CER reports
<http://web.stanford.edu/group/fms/fingate/finsystem/obi/report/cer/index.html>
- Dashboard Demo (50mins)
<https://stanford.bluejeans.com/playback/s/FDa50RunF3qYwRTRYq0Zk7ZvcNGvM10Vnk1q1Gj8InkjCG4JaGeXIMNDulOcNMw0>
- Open Lab Every Friday from 9 to Noon in Birch Lab
- Financial Support Center (FSC) Ext. 3-2772 for general questions about OBI

OBI Consolidated Expenditure Reporting (CER) Training and Support Options

User Type	Training and Support Options
Basic User Are you new to OBI CER and need help running standard reports without leveraging interactive features?	Here are the training and support resources that can help you. You can find hyperlinks to all these resources: http://tinyurl.com/CER-training-support .
Basic User Plus Are you new to OBI CER and want to leverage interactive features such as report formatting (include/exclude/move/sub-total) and/or customizing and sharing reports?	<ul style="list-style-type: none"> FIN-0340: Introduction to OBI Financial Reporting (Required) OBI Quick Start Guide FIN-0355: Overview of CER Dashboard CER Demo: (50-minute Blue Jeans Video Recording) Fingate support Materials <ul style="list-style-type: none"> Predefined Report List RM3 to OBI Crosswalks & OBI Task Mapping How-to Instructions Report Overviews Data Definitions Search
Experienced User Do you have prior OBI experience and are new to CER?	<ul style="list-style-type: none"> Post Go-Live Q&A Workshops Friday Open Labs (9:00 am - 12 noon, Birch Labs, 215 Panama Street)
Advanced User Do you consider yourself an advanced CER user and need consultation about specific business needs?	<p>We recommend:</p> <ul style="list-style-type: none"> Post Go-Live Q&A Workshops Friday Open Labs (9:00 am - 12 noon, Birch Labs, 215 Panama Street) Taking advantage of other training and support options that are available.

CER Scope by RM3 Reports



Drill down to transaction details formerly found in:
LABOR 168, LABOR 169, LABOR 170, LABOR 172, LABOR 173, LABOR 247, IOU 265, IOU 266, IOU 267, IOU 269, IOU 268, PCARD 187, TCARD 301, JNL 230, JNL 231



Evolve Financial Reporting

Consolidated Expenditure Reporting

- Drill down to details and across reports
- Faster than the equivalent RM3 reports
- Reports can be run over multiple years
- Ability to customize a dashboard report the way you want it (and save and share that customization!)
- Excel-like functionality (moving columns, changing sorts, summarization, etc.) directly in the OBI tool
- Functionality to export all reports in excel friendly format (you can pivot right away!)
- Consistent column names
- For those that want it, every project includes the delivery of an ad hoc