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Appendix – Suggested Classes for Managers and Financial Analyst
The University and the School of Humanities and Sciences both offer necessary training and on-going updates to address your roles and responsibilities. This document is primarily meant to be a guide for new department and program administrators to help navigate the myriad of websites, systems, policies, and procedures with which you should be familiar. The guide also serves existing department and program administrators as a quick reference and resource for your staff.

1. Resources

There are three main websites for financial information with which you should be familiar:

1.1 The Stanford Administrative Guide, https://adminguide.stanford.edu is the listing of University policies and procedures, which includes sections on Financial Administration, Giving to Stanford, and Purchasing and Payments, as well as other non-financial areas of administration such as Human Resources, Computing, Student Employment and Global Activities.

1.2 The Stanford Gateway to Financial Activities, known as the Fingate website https://fingate.stanford.edu offers additional policy information, step-by-step system instructions, and other resources to assist with financial tasks from managing your funds to processing transactions in the University’s financial systems and much more. This is also a helpful place to go for information about the University’s training opportunities.

1.3 The H&S Finance Intranet, https://finance-humsci.stanford.edu is a gateway to school-specific content with search tools that group relevant information by annual process, such as budgeting and year-end close. It contains school-specific policies and procedures, training materials, news items, a calendar of Finance report distribution and due dates, as well as the Finance Repository, which houses both current and historical financial documents for each department or program within the school and provides folders for sharing information between your unit and H&S Dean’s Office Finance.
The footnote of the H&S Finance website has links to the main financial and reporting applications used by the School, as well as other offices and contacts within the H&S Dean’s Office.

1.4 Authority Manager, https://authority.stanford.edu is a Stanford developed web application that allows you to view and grant authority across the many administrative (finance and other) applications on campus. The Dean’s Office (your liaison) and Departmental/Program Manager are jointly responsible for granting and updating authority privileges.
Below is a sample of the authority generally provided to H&S department and program administrators. Most Reporting, Financial System, and HandSON authority will be granted by your Finance liaison. Additional authority, such as Research Administration and Property Management, may need to be provided by other organizations. Your Finance liaison can assist you with that.
2. University Financial and Reporting Applications

2.1 Oracle Financials Systems is the core of Stanford’s Accounting System, which allows the University to conduct and manage its financial affairs, including key functions and modules used campus-wide. It can be accessed at: https://ofweb.stanford.edu.

Here is a sample of the roles and activities that can be performed in Oracle Financials.
Below from Fingate are the various **Oracle Financial System** modules and index pages: [https://web.stanford.edu/group/fms/fingate/staff/finauthority/oracle_systems.html](https://web.stanford.edu/group/fms/fingate/staff/finauthority/oracle_systems.html)

- Module overviews outline roles and responsibilities, how to get access, types of transactions, available training, and more.
- Index pages show where you will find How To instructions, job aids, etc., pertaining to the use of each module.

<table>
<thead>
<tr>
<th>Modules Used Campus-wide, Description &amp; Related Resources</th>
<th>Index Pages with Related Quick Steps &amp; Job Aids</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commitment Management System (CMS)</td>
<td>Funds Management</td>
</tr>
<tr>
<td>• A custom designed module used by school and department staff to forecast and manage available funds by tracking actual expenditures, accounting for anticipated expenditures and running &quot;what if&quot; scenarios. See Commitment Management System (CMS) web site.</td>
<td></td>
</tr>
<tr>
<td>Expense Requests</td>
<td>Buying and Paying, Reimbursements, Travel, Petty Cash Administration</td>
</tr>
<tr>
<td>• Allows processing and approval of expense reports/reimbursements, advances, Travel Card charges, non-PO payments and petty cash replenishments. See About Expense Requests.</td>
<td></td>
</tr>
<tr>
<td>Gift Transmittals</td>
<td>Funds Management, Cash Handling &amp; Deposits</td>
</tr>
<tr>
<td>• A custom designed module used by school / department staff and the Office of Development to enter, approve and track gifts made to the University. See About Gift Transmittals.</td>
<td></td>
</tr>
<tr>
<td>iBudgets</td>
<td>Funds Management</td>
</tr>
<tr>
<td>• A custom designed module that allows authorized users to initiate modifications to Expense or Revenue Control Information documented in the 9/1 University Consolidated Budget. See Overview: About the iBudgets Module of Oracle Financials.</td>
<td></td>
</tr>
<tr>
<td>Journals</td>
<td>Funds Management, Month-End / Year-End Close</td>
</tr>
<tr>
<td>• A custom designed module that allows users to initiate transfers among PTAs (Project, Task, Awards) or across Expenditure Types of Object Codes. See About the Journals Module of Oracle Financials.</td>
<td></td>
</tr>
<tr>
<td>Internet Procurement (including SmartMart)</td>
<td>Buying and Paying</td>
</tr>
<tr>
<td>• Allows campus users to initiate purchases of goods and services on behalf of their departments and business units. See About the Internet Procurement Module of Oracle Financials.</td>
<td></td>
</tr>
<tr>
<td>Labor Distribution</td>
<td>Month-End / Year-End Close, Payroll Administration</td>
</tr>
<tr>
<td>• Allows authorized users to distribute and adjust payroll earning allocations, which are paid by the PeopleSoft Payroll system, to the appropriate accounts (PTAs). See Overview: About the Labor Distribution Module of Oracle Financials.</td>
<td></td>
</tr>
<tr>
<td>PCard</td>
<td>Buying and Paying</td>
</tr>
<tr>
<td>• A custom designed module used to verify, edit, search, approve, or withdraw charges made against Stanford Purchasing Cards (PCards). See About the PCard Module of Oracle Financials.</td>
<td></td>
</tr>
<tr>
<td>PTA Maintenance</td>
<td>Account Structure, Chart of Accounts, Funds Management</td>
</tr>
<tr>
<td>• A custom designed module used to update PTA attributes for existing non-sponsored and miscellaneous accounts receivable accounts (PTAs). See About PTA Manager and PTA Maintenance.</td>
<td></td>
</tr>
<tr>
<td>PTA Manager</td>
<td>Account Structure, Chart of Accounts, Funds Management</td>
</tr>
<tr>
<td>• A custom designed module used to request, approve and track non-sponsored and miscellaneous accounts receivable accounts (PTAs). See About PTA Manager and PTA Maintenance.</td>
<td></td>
</tr>
<tr>
<td>Sunflower</td>
<td>Capital Equipment and Capital Projects</td>
</tr>
<tr>
<td>• Provides authorized users a means of tracking specific moveable assets and the ability to report on the status of these assets. See Property Training, Property Management Office.</td>
<td></td>
</tr>
</tbody>
</table>
2.2 **OBI (Oracle Business Intelligence Reporting)** is the main suite of reporting analysis tools for the University. You can access OBI at: [https://bi.stanford.edu](https://bi.stanford.edu).

To find out quickly which report you need to run in OBI, please select the main **Dashboard**, then go to **Finance dashboard** and select **Financial Reporting Directory**.
The Financial Reporting Directory contains different financial sections, with the reports, and a short description of the reports with a reference to the report in ReportMart3 (retired financial reporting tool).

Ongoing support

- **Step-by-Step Instructions** are available in the How To section
- **Resources** are available from the Resources page
- **Friday Open Lab**: No registration is required. See details.
To gain access to OBI Financial Reporting:

1. Enroll in and complete the online Financial Confidentiality Agreement in STARS (FIN-PROG-0010).
2. Complete the required training.
3. The school or department must grant you OBI financial reporting authority via Authority Manager.

There are two types of Authority for OBI:

<table>
<thead>
<tr>
<th>Report Viewer</th>
<th>Intermediate Ad Hoc</th>
</tr>
</thead>
<tbody>
<tr>
<td>- An introduction to the suite of OBI financial reports for all financial administrators and analysts.</td>
<td></td>
</tr>
<tr>
<td>- View all static and interactive reports delivered via OBI report catalogs and dashboards.</td>
<td></td>
</tr>
<tr>
<td>- Perform essential analysis through interactive reports using drill down and drill across functionality.</td>
<td></td>
</tr>
<tr>
<td>- Designed for experienced financial analysts whose job requires flexible and specific ad hoc financial analysis and reporting.</td>
<td></td>
</tr>
<tr>
<td>- Create customized analyses and share with other ad hoc users.</td>
<td></td>
</tr>
<tr>
<td>- Share analyses with non-ad hoc users via export to Excel, PDF, or PPT.</td>
<td></td>
</tr>
</tbody>
</table>

For basic use of OBI, the following training is recommended:

<table>
<thead>
<tr>
<th>Training for Predefined Report Users</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Number</strong></td>
<td><strong>Course Name</strong></td>
</tr>
<tr>
<td>FIN-0340</td>
<td>Introduction to OBI Financial Reporting</td>
</tr>
<tr>
<td>FIN-0345</td>
<td>CER Dashboard Intermediate Workshop</td>
</tr>
<tr>
<td>FIN-0351</td>
<td>Introduction to Payroll and Labor Management Reporting Using OBI</td>
</tr>
<tr>
<td>FIN-0353</td>
<td>OBI Financial Reporting – Expense Requests &amp; SU Card Activity Predefined Reports</td>
</tr>
<tr>
<td>FIN-0355</td>
<td>OBI Financial Reporting – Consolidated Expenditure Reporting Dashboard</td>
</tr>
</tbody>
</table>

Suggested training for advanced users:

<table>
<thead>
<tr>
<th>Training for Ad Hoc Users</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Number</strong></td>
<td><strong>Course Name</strong></td>
</tr>
<tr>
<td>FIN-0350</td>
<td>Creating Financial Analyses Using Oracle Business Intelligence</td>
</tr>
</tbody>
</table>
2.3 Faculty Financial Inquiry Tool (FFIT)

The Faculty Financial Inquiry Tool (FFIT), https://ffit.stanford.edu provides a quick view of the balances and includes drill-down transaction details for each faculty’s individually owned active accounts, as well as all of the accounts for each organization. You must be granted Reporting Salary View authority for either an entire org code or an individual researcher in order to be able to use this tool.

2.4 Stanford Electronic Research Administration (SeRA)

The Stanford Electronic Research Administration System (SeRA), https://sera.stanford.edu is a system that supports research administration at Stanford, tracks the various stages of the sponsored project lifecycle from the initial proposal to award closeout, and serves as the institutional system of record for sponsored projects. All users with a sponsored SUNet ID can access SeRA.
The major component of SeRA is:

- **Financial Account Setup** - Once the Award notification is generated by SeRA, a new PTA set up transaction is automatically generated by the SeRA system and assigned to a departmental administrator to fill out departmental information. If cost sharing is committed, the new PTA setup will automatically create a unique cost sharing PTA as needed.

Cost Share PTAs must be funded by the end of each fiscal year and at the end of each award period. Cost Sharing PTAs cannot be in overdraft at the end of the University’s fiscal year.

University Research awards follow the same path as all other sponsored projects through the SeRA system. If you are not sure that your award is considered University Research, please see the Research Policy Handbook 13.2 [https://doresearch.stanford.edu/policies/research-policy-handbook](https://doresearch.stanford.edu/policies/research-policy-handbook)

To find answers to common research-related questions, please go to [https://doresearch.stanford.edu/howto](https://doresearch.stanford.edu/howto)

### 2.5 Stanford Gift Processing

Receipts of cash or checks are considered gifts when they are from an outside entity and are given in support of a school, department, or the University and the donor receives only an acknowledgment in return, i.e., Stanford provides no goods or services to the donor. Please see Examples of Gifts (and exceptions) for more details.

**Receiving and Processing Gifts**

All gifts arriving at or transferred to any part of the University should be initiated in the Gift Transmittals system by a trained user, and then be sent on the same day the gift is received to the Office of Development, 326 Galvez Street, and mail code 5018.

Processing Gifts and Required Documentation:

- Scan all original correspondence pertaining to a gift, including the envelope and/or shipping label. The postmarked envelope will ensure the proper gift date is verified and recorded by Development Services and that the receipt issued by Development Services to the donor will reflect the proper date for the donor's tax purposes.

- Initiate a Gift Transmittal. An authorized Gift User can go to the system and login using SUNet ID and password. Instructions are available on Fingate on how to complete a GT.
• After completing the GT, write the gift PTA and GT number on the document so that Development Services knows where to deposit the check and then put the documents into an interdepartmental envelope. The envelope needs to have a receiving and sending address as well as the sender’s email and phone number.

• Any questions should be directed to Development Services, (650) 725-4360 or development-services@lists.stanford.edu.

• The gift should be forwarded (or dropped off) immediately for prompt deposit to Development Services (326 Galvez Street, mail code: 5018).

If in doubt whether the check you received is a gift or support for a sponsored project, please check RPH 13.1 Definition of Sponsored Projects and Distinctions from Other Forms of Funding.

Please note that any proposed fund-raising activities should be cleared with the Office of Development in advance to ensure compliance with tax laws and regulations.

2.6 PTA Maintenance

PTA Maintenance, a sub-component of the PTA Manager system, allows schools and departments to update or change PTA attributes for existing accounts. Attributes are like descriptive adjectives, providing additional information about each segment of PTA, for example “Project Owning Org” or “Award Manager.” They are used primarily in Financial Reporting (to select, sort, or summarize data) and in Oracle Workflow to determine where to route transactions for notification and/or approval, among other things.

The most common PTA maintenance is due to a change of personnel in a department/program, or a change in personnel roles. The update could be done as Update a Single PTA or Update an Attribute for Multiple PTA Segments. To complete either, please log in to https://ofweb.stanford.edu, entering your SUNet ID and password.
3. The Humanities and Sciences Systems

3.1 The **Budget Planning System (BPS)** is used in the School of Humanities & Sciences for the annual Operating Budget process. The tool can be accessed directly at: 

[hs-bps.stanford.edu](http://hs-bps.stanford.edu)

Tidemark is the University’s official budget management tool.

Currently departments and programs in H&S use BPS for the 9/1 Operating Budget process. The H&S Dean’s Finance team aggregates the department’s budgets developed in BPS and uploads them to Tidemark [https://stanford.tidemark.net](https://stanford.tidemark.net).
3.2 The **Graduate Financial Planning System (GFPS)** contains budgeted and actual student data and is used for budgeting and forecasting graduate student aid. It also provides an upload to GFS. To access GFPS please go to [https://hs-gaweb-dev.stanford.edu](https://hs-gaweb-dev.stanford.edu)

3.2 **HandSOn** is the School of Humanities & Sciences online database of one-time financial commitments to departments and programs from the H&S Deans and the President and Provost. To access, please select [https://handsonweb.stanford.edu](https://handsonweb.stanford.edu).

Department and program administrators are provided view access and reporting capabilities. They receive reports generated by the Finance liaisons and posted to the Finance Repository on our web site.
For training on HandSO n please go to our website, training section https://finance-humsci.stanford.edu/training where you can find:

- HandSO n – Quick Start Guide
- HandSO n User Guide for Departments and Programs

Please contact your liaison if you have any questions or need help.
4. Staying Informed

4.1 For Stanford University financial system changes it is recommended that you subscribe to the email list subscriptions below. Below is the link Staying Informed.

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Click a link below to subscribe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commitment Management System (CMS)</td>
<td>Note: The CMS user mailing list includes all staff with access to CMS.</td>
</tr>
<tr>
<td>IBudgets</td>
<td>Subscribe to ibudgets-users@lists</td>
</tr>
<tr>
<td>Journals</td>
<td>Subscribe to journals-users@lists</td>
</tr>
<tr>
<td>Internet Procurement</td>
<td>Subscribe to purch-users@lists</td>
</tr>
<tr>
<td>Expense Requests</td>
<td>• Subscribe to reimburse-users@lists</td>
</tr>
<tr>
<td></td>
<td>• Subscribe to petty-cash@lists</td>
</tr>
<tr>
<td>Labor Distribution</td>
<td>• Subscribe to ld-adjusters@lists</td>
</tr>
<tr>
<td></td>
<td>• Subscribe to labor-schedulers@lists</td>
</tr>
<tr>
<td>Oracle Business Intelligence (OBI)</td>
<td>Note: The OBI user mailing list includes all staff with access to OBI Financial Reporting tools</td>
</tr>
<tr>
<td>PCard</td>
<td>Subscribe to pcard-users@lists</td>
</tr>
<tr>
<td>Sunflower</td>
<td>For the latest information about Sunflower, visit the Property Management Office web site.</td>
</tr>
</tbody>
</table>

4.2 For Humanities and Sciences Finance updates and important dates please check our H&S Finance website at https://finance-humsci.stanford.edu/.
5. Training and Registration for Classes

Determining the necessary training for any financial area or a specific financial task can be done in the Stanford Training and Registration System (STARS) or Stanford Gateway to Financial Activities (Fingate).

5.1 The STARS system is used to enroll in learning courses and programs, and to track your progress or the progress of your direct reports.

Departmental and Program Managers

- **STARS Track**: use this tool to assign and track required training.
- **View Direct Reports Learning Records** (link is external) is used to view the learning records of your direct reports (and those in the organizational hierarchy below their direct reports).

Employees

To enroll in a class, please log in to https://axess.sahr.stanford.edu.

1. **Search Catalog** for a specific assigned class and complete registration
2. **Browse Catalog** to determine training by area (if you don’t know which class to take)
3. **Training Needs Assessment** to determine a specific training need (similar to Browse Catalog)
4. **STAP Balance** to check on your yearly allocation and the balance for training
5. **All Learning** shows all classes you’ve taken and for which you’ve signed up
To self-identify training needs you can use either **Browse Catalog** or **Training Needs Assessment**.

If you select “**Browse Catalog**” the screen below will open up with the possible areas of training. For the Finance Analyst, please select Financial Activities and Applications.

**Browse Catalog**

<table>
<thead>
<tr>
<th>* Administrative Applications</th>
<th>* Human Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systems used for University-wide processes and procedures, including Oracle Financials, PeopleSoft HRMS, PeopleSoft Student Administration, PeopleSoft ELM (STARS), Postgrads, ReportMart1 and ReportMart3.</td>
<td>Workshops and classes related to your employment, including benefits, compensation and classification, HIPAA, management effectiveness, recruitment and candidate selection, sexual harassment prevention, general workplace skills, and more.</td>
</tr>
<tr>
<td>* Computing and Technology Training</td>
<td>* New Employees/New Hires</td>
</tr>
<tr>
<td>Keep pace with changing technology via hands-on and other training on your computer's applications and operating system.</td>
<td>Training intended for new employees. See other categories in addition to this category, for training specific to your role or responsibilities.</td>
</tr>
<tr>
<td>* Financial Activities and Applications</td>
<td>* Research and Regulatory Compliance</td>
</tr>
<tr>
<td>Training for Stanford financial activities &amp; financial system applications.</td>
<td>Training related to compliance with regulations governing research and other activities. Includes training regarding the proper stewardship of research activities.</td>
</tr>
<tr>
<td>* Fundraising and Alumni Relations</td>
<td>* Safety, Health and Environmental Protection</td>
</tr>
<tr>
<td>Training regarding University fundraising and alumni relations, including learning to use PostGRADS. Courses are primarily offered to OOD, Alumni Relations, and SAA employees.</td>
<td>Learn how to prevent accidents and to protect yourself and the environment with safety and health training. Courses for all staff, faculty and students.</td>
</tr>
<tr>
<td>* Residential and Dining Enterprises</td>
<td>* Other Training offered at Stanford</td>
</tr>
<tr>
<td>Find training regarding Student Housing, Dining Services and Conference Services. Includes training to support personal and career development: job skills, safety, and software training.</td>
<td>Trainings from Sustainable Stanford, BeWell Program, Health Improvement Program, LBRE, Bechtel, DAPER, Stanford Center for Professional Development, Stanford Continuing Studies and Stanford Faculty Briefings.</td>
</tr>
</tbody>
</table>

**Training Needs Assessment** [link is external] is a tool in STARS to self-identify required training. The tool guides you through a series of questions related to your work responsibilities. Based on your responses, the system will generate a list of required training courses tailored to your role(s).

After using either “**Browse Catalog**” or “**Training Needs Assessment**” and determining your training needs, please go to “**Search Catalog**” to find the specific class and complete the registration.

For frequently asked questions please check [FAQ](link is external)
5.2 **Stanford Gateway to Financial Activities** (Fingate) provides an alternative way to self-identify your training needs. The web site can be accessed at:

https://web.stanford.edu/group/fms/fingate/staff/index.html

The first tab, “**Common Activities**”, provides basic knowledge of Stanford’s Account Structure: Chart of Accounts to classify and record financial transactions. There is also detailed information related to buying and paying, reimbursements, payroll, cash handling and deposits.

The **“Launch Systems”** drop down menu provides shortcuts to several Oracle financial applications including Oracle (ofweb), Authority Manager, OBI Reporting, and Axess.

The **“Learn about Systems”** drop down menu provides shortcuts to many training environments (e.g., Expense Requests, Gift Transmittals, iJournals, OBI Reporting, and PCard).
The second tab, “More Activities,” provides basic knowledge of Funds Management and its policies, with resources, forms and training references for using Stanford’s Chart of Accounts. It also provides training on handling gifts, other administration policies and procedures, capital equipment handling, debt management, tax compliance, and other reporting tools.

If you select Training (marked by the arrow above), a page will open up with three possibilities for further search:

- Training by Task
- Training by Activity
- Training by System

Depending on your job description and assigned financial tasks, you can quickly view the assigned financial area through Training by Activity, and the systems to which you will need access to (such as Axess Timecard, Gift Transmittals, Oracle Business Intelligence (OBI), Financial Reporting, etc.) through Training by System, to specific classes (DOR-1101, FIN-0100, etc.) you will need to take by Training by Task.
All Training by Activity

Find available courses and related training materials by financial task, activity or application.

Select a financial activity below to view available courses.

- Account Structure: Stanford’s chart of Accounts
- Budget Management
- Buying and Paying
- Capital Equipment and Capital Projects
- Cash Handling and Deposits
- Financial Authority
- Financial Reporting
- Funds Management
- Month-end / Year-end Close
- Payroll Administration
- Payroll for Employees
- Petty Cash Administration
- Reimbursement / Expense Reporting
- Supporting Students
- Tax Compliance
- Travel

All Training by System

Find available courses and related training materials by financial task, activity or system.

Select a system below to view available training resources.

- Authority Manager
- Asess Timecard
- Commitment Management System (CMS)
- Gift Transmittals
- Oracle Business Intelligence (OBI) Financial Reporting
- Oracle Expense Requests
- Oracle iBudgets
- Oracle Journals
- Oracle Internet Procurement
- Oracle Labor Distribution
- Purchasing Card (PCard)
- PeopleSoft
- PTA Manager
- Sunflower Assets
- Supplier / Payee Request Portal
- TideMark Budgeting

Overview of Financial Transaction Systems @ Stanford

Training

Find available courses and related training materials by financial task, activity or application.

If you do this... | Take these classes | Class Title | Financial Category
---|---|---|---
Access any financial data or perform any financial activity | FIN-PROG-0010 | Financial Confidentiality Agreement | Finance Fundamentals
Manage stewardship of Stanford finances | DOR-1101 | Understanding Cost Policy | Financial Authority
FIN-0100 | Internal Controls |
The Stanford Gateway to Financial Activities has at the end of this page a link to “Register in STARS via Axess.”

Please select the link and register for the selected class.
6. Annual Accounting Cycle and Finance Calendar

6.1 Important Financial Dates are directly linked to annual accounting cycle which consists of:

- September/October (year-end reporting)
- October (operating budget funding)
- November (1st quarter special commitments review and funding)
- December/January (graduate aid five-year forecasting)
- May (graduate aid budget planning)
- June/July (operating budget planning)
- August/September (year-end close activities)

6.2 Finance Calendars is available through the Finance Intranet website at: https://finance-humsci.stanford.edu/calendar/month (July 2017 important dates and deadlines are shown in the example below). “Additional Calendars” related to many important dates and deadlines such as the academic calendar, the Year-End close calendar, and other financial activities announced in Fingate are also available by clicking on the links.

Please note that you can always contact your Finance liaison in the Dean’s Office who can guide and assist you. Please check Contacts on our Finance web page to find the liaison assigned to your department or program.
Appendix

Financial Activities and Applications – suggested classes for Finance Analysts

<table>
<thead>
<tr>
<th>Financial Confidentiality Agreement : FIN-PROG-0010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees dealing with confidential financial data are entrusted with its responsible management. This online acknowledgement is a required prerequisite for most financial privileges in Authority Manager. Bi-annual recertification will be required.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Using Stanford’s Chart of Accounts : FIN-0102</th>
</tr>
</thead>
<tbody>
<tr>
<td>This online course explains how the Chart of Accounts system is used to track the flow of money into and out of the University. It is a required prerequisite for most financial training courses involving processing and approving financial transactions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Understanding Cost Policy : DOR-1101</th>
</tr>
</thead>
<tbody>
<tr>
<td>This class explains Stanford’s accounting system, cost reimbursement policies, the structure and use of the Chart of Accounts. It is required for signature authority. This class is also required for a Cardinal Curriculum Level I certificate.</td>
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<table>
<thead>
<tr>
<th>Approving Financial Transactions : FIN-0103</th>
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<tbody>
<tr>
<td>This online course is required for all staff who will be approving transactions in Oracle Financials including travel and business expenses, requisitions and journals. REQUIRED PREREQUISITE: FIN-PROG-0010, FIN-0102, FIN-0400, DOR-1101</td>
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<table>
<thead>
<tr>
<th>Internal Controls : FIN-0100</th>
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<tbody>
<tr>
<td>This course defines and explains why internal controls are important for all SU employees. At the completion of the course, you will understand the elements of controls. You must complete the online quiz to receive credit for this course.</td>
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Labor Distribution and Payroll Administration

<table>
<thead>
<tr>
<th>Labor Schedules : FIN-0510</th>
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</thead>
<tbody>
<tr>
<td>This course is required for access to Labor Schedules in Oracle. The course is a recorded webinar with hands-on exercises at the end. NOTE: You will launch the pdf under Notes &amp; Attachments to complete test exercises. REQUIRED PREREQUISITE: FIN-0010.</td>
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<thead>
<tr>
<th>Labor Distribution Adjustments : FIN-0520</th>
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<tbody>
<tr>
<td>This course is required to obtain access to Labor Distribution Adjustments in Oracle. The course is a recorded webinar with hands-on exercises. NOTE: You will open the pdf under Notes &amp; Attachments to complete test exercises. REQUIRED PREREQ.: FIN-0010.</td>
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<tr>
<th>Introduction to Payroll and Labor Management Reporting Using OBI : FIN-0351</th>
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<tr>
<th>Creating Financial Analyses Using OBI : FIN-0350</th>
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<tbody>
<tr>
<td>This lab course for ADVANCED users instructs on utilizing OBI for generating custom financial reports and performing advanced analyses. FIN-0340 is a required prerequisite. Intermediate Ad Hoc authority must be granted prior to class.</td>
</tr>
</tbody>
</table>
Buying and Paying

Purchasing Using Stanford's SmartMart (catalog) : FIN-0412
This webinar teaches basic SmartMart purchasing skills. It includes tips on searching for items, filtering search results, creating shopping carts, and checkout or cart assignment.

Continue >>

Non-Catalog Purchasing Using Oracle iProcurement : FIN-0410
This webinar demonstrates how to purchase items not available in SmartMart. It shows requisition types, user preferences, non-catalog order types, and checking requisition status.

Continue >>

PCard Policies and Procedures : FIN-0450
This course is required for custodians/verifiers of the Stanford Purchasing Card. It provides information on policies & procedures for PCard use & instruction on the application. Tutorial is located under Notes & Attachments tab. Prerequisite: FIN-0102.

Continue >>

Introduction to Expense Requests System : FIN-0500
This course is required to access SU Expense Requests for staff who generate expense reports (including TCard transactions), reimbursement requests, advances, non-PO payments, and petty cash admin. FIN-0102 and FIN-0400 are required pre-requisites.

Continue >>

Non-PO Payment Requests : FIN-0504
This course is for employees responsible for paying certain types of expenses that do not require a formal purchase order such as human subjects, honoraria, royalties, dues and subscriptions, conference registration, training, catering, or relocation.

Continue >>

Requesting and Clearing Advances : FIN-0502
This course is for staff who need to request and clear cash advances in the Expense Requests system. The interactive course covers policies and procedures and allows you to practice requesting and clearing advances. FIN-0500 is a required prerequisite.

Continue >>

Paying Human Subjects : FIN-0508
This course covers guidelines and methods for paying human subjects and the use of the Expense Requests system to do so. PIs and study administrators assume responsibility for proper accounting of funds spent in the paying of human subject participants.

Continue >>

Supplier/Payee Setup : FIN-0509
This course is recommended for staff who do business with suppliers or visitor payees requiring payment from Stanford. This includes suppliers in iProcurement, as well as non-PO payments and visitor reimbursements through Expense Requests.

Continue >>

Travel and Reimbursements

Introduction to Expense Requests System : FIN-0500
This course is required to access SU Expense Requests for staff who generate expense reports (including TCard transactions), reimbursement requests, advances, non-PO payments, and petty cash admin. FIN-0102 and FIN-0400 are required pre-requisites.

Continue >>

Traveling for Stanford : FIN-0400
This course is required for travelers, travel administrators and approvers. It explains Stanford's policies on travel & reimbursements, identifies roles & responsibilities for Stanford-related travel, and outlines steps before, during, and after travel.

Continue >>

Expense Reports with Travel Card Charges : FIN-0402
This course is required to become certified as a TCard validator and prepare expense reports containing travel card charges. FIN-0500 and FIN-0400 are required prerequisites.

Continue >>
Funds Management and Budgeting

**FUNDamentals of Funds: Introduction to Funds Management : FIN-0170**
This course is intended to teach the skills and concepts necessary to effectively manage your Stanford Funds. This introductory level course should be taken by all employees who have financial responsibility for Stanford Funds.

**Maintaining PTA Attributes Using PTA Manager : FIN-0202**
This online course is the second required for access to PTA Maintenance. The course explains how to use the PTA Maintenance module to maintain PTA owning attributes. FIN-0200 is a REQUIRED PREREQUISITE.

**Expenditure Statement Reconciliation and Review : FIN-0160**
This online course is intended to teach the skills and concepts necessary to reconcile and review expenditure statements. The course assumes that you have a working knowledge of ReportMart3.

**Understanding Graduate Financial Aid Expenditures : FIN-0110**
Recommended for individuals who process and manage graduate student aid. This course will help you better understand the flow of graduate financial support through University systems.

**Initiating Gift Transmittals : FIN-0190**
This online course shows you how to initiate a new gift and track the processing of a gift through workflow. This course is a required prerequisite to gain access to the Gift User system. REQUIRED PREREQUISITE: FIN-PROG-0010.

**Approving Gift Transmittals : FIN-0191**
This course is for users who are responsible for approving monetary gifts using Stanford’s Gift Transmittals system. It is required to receive approval authority in the system. FIN-0190: Initiating Gift Transmittals is a required prerequisite.

Financial Reporting Tools

**Introduction to OBI Financial Reporting : FIN-0340**
Required introduction to OBI Financial Reporting. This course is a required prerequisite for receiving OBI Report Viewer authority. FIN-PROG-0010: Fin. Confidentiality Agreement is a REQUIRED prerequisite.

**Introduction to Payroll and Labor Management Reporting Using OBI : FIN-0351**

**OBI Financial Reporting - Expense Requests & SU Card Activity Predefined Reports : FIN-0353**
Recommended for staff who need an introduction to the OBI Expense Requests and SU card activity predefined reports. Required prerequisite for new OBI users: FIN-0340: Introduction to OBI Financial Reporting.

**OBI Financial Reporting - Consolidated Expenditure Reporting Dashboard : FIN-0355**
This online course is recommended for OBI users who need to use Consolidated Expenditure Reporting Dashboard reports. The required training for OBI access is FIN-0340: Introduction to OBI Financial Reporting. Road Abstract for details.

**OBI Financial Reporting Workshop : FIN-0341**
Practice running OBI Revenue and Fund Management reports during this instructor-led session. IMPORTANT: You MUST complete web course FIN-0340, Introduction to OBI Financial Reporting to receive OBI Report View authority to participate in this workshop.