Financial Online Reporting Services (FORS)

Orientation
March 31, 2011

Finance Division
Agenda

- Introductions
- What is FORS?
- Background
- Focus Group
- Key Features to Remember
- Key Dates
- What do you need to do?
- System demonstration
- Questions

Finance Division
Presenters

- Steve Hall, Director, Financial Projects
- John Notarantonio, Senior Database Warehouse Developer
What is FORS?

Financial Online Reporting Services (FORS) gives you the ability to generate standard reports quickly and easily by selecting reporting criteria from drop-down menus.
Key Points

- Generate reports quickly
- Will not overwrite
- Flexible criteria selection
- Drill through to underlying levels of detail
- Data refreshed nightly
- Completely web based; no downloads to your computer necessary
Guiding Principles

- Priorities Based on Group Consensus
- Intuitive Report Functionality
  - Useful
  - Easy to Retrieve
  - Easy to Interpret
  - Multiple Output Options
- Valid Compass Data
  - Relationships Existing Within Compass
  - Reliable
- Balance Timeliness with Functionality
Reporting Initiatives

Phase 1

**FinWeb Delivery**
- Finance Reports
- Static Documents Delivered By User Selection via FinWeb
- SQR Generated BOP, NSF, SPP Detail Reports w/AllTrans Detail

Phase 2

**PeopleSoft Delivered Portal Functionality Within Compass**

Phase 3

**Business Intelligence Data Warehousing**

Phase 3

**Campus Enhancements**
- Base Report & Distribution Enhancements
  - Uses Base BOP, NSF, & SPP Reports
  - Meets at Operating Unit Level
  - Department Distribution Needs and Levels
Reporting Focus Group

- Gene Murphy (Co-Chair) - Emory College
- Drew Smith (Co-Chair) - Development & Alumni Relations
- Roman Damena - School of Nursing
- Tim Lawson - Campus Services
- Ron Moody - Academic Affairs & Provost
- Cindy Nguyen - School of Medicine
- Michelle Polk - School of Public Health
- Melinda Ogilvie - School of Public Health
- Jose Rodriguez - Graduate School
- Paula Scotman - Campus Life
- Kathy Simmons - Emory College
- Deanna Walker - School of Medicine
- Jonda Williams - Yerkes
- Michael Williamson - University Libraries

Project Resources:
- John Notarantonio - UTS
- Steve Hall - Controller’s Office

Finance Division
Key Dates

- March 31, 2011 – Phase 1 Rollout
  - Limited access
  - We’ll ask you for feedback
- April 18, 2011 – Rollout to entire campus
  - Access to all RPT users
What Do You Need To Do?

- Sign on: https://fors.emory.edu/
- Change the Username field to EmoryUnivAD\[your user id] and provide your password
- Run reports
Support for Rollout to Your Units

Following April 18, 2011 rollout to campus:

- Four webinars:
  - April 19
  - April 22
  - April 26
  - April 29

- First Reporting Basics class to include FORS:
  - April 20

- FORS information at [www.finance.emory.edu](http://www.finance.emory.edu)