

UIT Financial Reporting

Report Name	Description/Purpose	Frequency	Delivered by	User	Location of Report
FY19 UIT Budget	Budget Dashboard, PTA Summary and FTE	Annual	September	PTA Owners	https://tableau.stanford.edu/#/site/ITS/views/UITFY19BUDGET/UITClientFin-BudgetDashboard?iid=1
FY19 UIT Actuals Dashboard	Actuals results, PTA Summary and Detailed Transition Drilldown	Monthly	7th Business Day	PTA Owners	https://bi.stanford.edu/analytics/saw.dll?PortalGo&Action=prompt&path=%2Fshared%2FFinance%2FShared%2FBusAffairs%2FUIT%20Finance%2FFY19%20UIT%20Financial%20Summary
FY19 Forecast Dashboard	Forecast, PTA Summary, PTA Details and PTA by Category; Query by Award, PTA Number or PTA Name	Monthly after Q1	Last Week of Each Month after forecast completed	PTA Owners	https://tableau.stanford.edu/#/site/ITS/views/UITFY19FORECAST/UITForecastDashboard-FY19?iid=1
UIT PTA Authority List	List of PTA Types, Award, Group, Description, and Approval Authority	As needed	Varies	Admin Team, Vendor Management	After file uploaded to OneDrive, an email notification is sent for recipients to retrieve document via OneDrive
UIT Staff PTA List	PTA Summaries for various expenses Salary and EMS PTA by Employee	As needed	Varies	Admin Team, Vendor Management	After file uploaded to OneDrive, an email notification is sent for recipients to retrieve document via OneDrive
Service Area Over/Under Report	Cost Recovery by Service Area	Monthly or as needed	Varies	Service Area Managers	Send to Managers via email

UIT Finance Team

Name	Title	Email	Areas	Responsibilities
Molly Reynick	Senior Director of Finance	mreynick@stanford.edu		
Christine Saint Georges	Associate Director, Finance	stgeorge@stanford.edu	ISO Research Computing	Budgeting Forecasting Internal Financial Reporting CFO Quarterly Reporting Budget Development Debt Service and Capital Planning Financial Policies and Procedures
Javier Junco	Finance Manager	jjunco@stanford.edu	UIT Service Center	Budgeting Forecasting Rate Setting Financial Modeling RAPC - Research Administration Policy & Compliance
Shachi Chopra	Finance Manager	shachic@stanford.edu	Enterprise Technology ADAPT Project SGG Projects	Budgeting Forecasting Financial Modeling Internal Financial Reporting
Karla Martinez	Financial Analyst	karla5@stanford.edu	Service Strategy	Budgeting Forecasting Debt Service and Capital Planning PTA Authority Management Hardware Maintenance Accounting Cost Allocation and True-Up Financial Modeling

Matt Paquet	Financial Analyst	mpaquet@stanford.edu	Client Services Communications & Facilities Operating Budget SLAC IT Support SWRC	Budgeting Forecasting Software Expense Accounting Headcount/FTE Analysis Labor Management Reporting Tableau Reporting Financial Modeling
Paola Segura	Financial Analyst	psegura@stanford.edu	CIO Office Stanford Web Services Stanford Research Computing Facility	Budgeting Forecasting Cost Allocation and True-Up Monthly Accounting Close Financial Modeling
Natalie Macia	Financial Analyst	nmacia@stanford.edu	UIT Service Center	Budgeting Forecasting Rate Setting Financial Modeling RAPC - Research Administration Policy & Compliance
Viola Cabagbag	Financial Analyst	violac@stanford.edu	Enterprise Technology SGG Projects	Budgeting Forecasting UIT Communication Suppliers Payment Review

HELPFUL LINKS

Name	Description/Purpose	Location
Charge-Back Service Rates	Detailed rate information by service area	https://uit.stanford.edu/rates
Fund Title Query	View fund (award) information, including fund purpose, related projects and tasks, and attributes	https://web.stanford.edu/group/fms/fingate/staff/finreporting/res_jobaid.html
Expense Title Query	View expenditure type codes, including transaction usage and full description	https://web.stanford.edu/group/fms/fingate/staff/finreporting/res_jobaid.html
Requisition and Purchase Order Query	Requisition and Purchase Order details	https://web.stanford.edu/group/fms/fingate/staff/finreporting/res_jobaid.html
Signature Authority Query	View authorized transaction approvers for an award	http://web.stanford.edu/group/fms/fingate/staff/finauthority/quick_steps/view_auth_assignmt.html
Sponsor a SUNet ID Account	How to sponsor a SUNet ID account	https://uit.stanford.edu/service/sponsorship