STAR System Training

New User Training LABS
Lab #1 – Use Existing Report

Scenario:

Your boss wants a report that shows the Variance between FY11 Original Budget, All Actuals and Current Budget for all the accounts under 1RP1EAA

Try to complete the lab without looking at the next slides! But if you need a hint, turn the page…
LAB #1 - Hints

1. Open Existing Report

2. Select “Budget Var – Approp Unit detail.xlt”

3. Set Entity to 1RP1EAA and Time to 2011.TOTAL
LAB #1
“The Answer”

BUDGET VARIANCE REPORT - BY APPROP UNIT CODE
ALL FUNDS
1RP1EA A DEAN: COMMUNITY RELATIONS
FISCAL YTD THROUGH 2011: total

<table>
<thead>
<tr>
<th>Object</th>
<th>Original Budget</th>
<th>Current Budget</th>
<th>All Actuals (incl. Encum.)</th>
<th>Variance to Original Budget</th>
<th>% Variance</th>
<th>Variance to Current Budget</th>
<th>% Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Balance</td>
<td>411,560</td>
<td>411,650</td>
<td>665,919</td>
<td>(244,449)</td>
<td>-59%</td>
<td>(244,449)</td>
<td>-59%</td>
</tr>
<tr>
<td>STATE APPROPRIATIONS</td>
<td>665,919</td>
<td>670,070</td>
<td>670,070</td>
<td>(5,088)</td>
<td>-1%</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>TUITION AND FEES</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>GRANTS, CONTRACTS AND GIFTS</td>
<td>1,907</td>
<td>(1,907)</td>
<td>(1,907)</td>
<td></td>
<td>0%</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>TECHNOLOGY &amp; RESEARCH INITIATIVE</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>SALES AND SERVICES</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>MISCELLANEOUS AND OTHER</td>
<td>(22)</td>
<td>22</td>
<td>22</td>
<td></td>
<td>10%</td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>TRANSFERS IN</td>
<td>1,116,100</td>
<td>1,118,147</td>
<td>1,011,347</td>
<td>104,733</td>
<td>9%</td>
<td>106,800</td>
<td>10%</td>
</tr>
<tr>
<td>OTHER ADDITIONS</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>OTHER DEDUCTIONS</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>Revenue Excluding Beginning Balance</td>
<td>1,790,962</td>
<td>1,798,217</td>
<td>1,843,102</td>
<td>96,280</td>
<td>5%</td>
<td>104,915</td>
<td>6%</td>
</tr>
<tr>
<td>PERSONAL SERVICES</td>
<td>1,022,600</td>
<td>1,026,618</td>
<td>852,084</td>
<td>170,515</td>
<td>17%</td>
<td>176,534</td>
<td>17%</td>
</tr>
<tr>
<td>EMPLOYEE RELATED EXPENSES</td>
<td>337,221</td>
<td>338,098</td>
<td>67,028</td>
<td>270,963</td>
<td>80%</td>
<td>272,770</td>
<td>80%</td>
</tr>
<tr>
<td>ALL OTHER OPERATING</td>
<td>296,143</td>
<td>306,103</td>
<td>133,905</td>
<td>232,237</td>
<td>63%</td>
<td>232,237</td>
<td>63%</td>
</tr>
<tr>
<td>DIRECT COST OF SALES</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>FINANCIAL AID</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>TRANSFERS OUT</td>
<td>160,000</td>
<td>166,000</td>
<td>163,000</td>
<td>3,000</td>
<td>100%</td>
<td>160,000</td>
<td>100%</td>
</tr>
<tr>
<td>Objects with no Appropriation Unit Code - Parent</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>0%</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>All Expense Objects</td>
<td>1,894,463</td>
<td>1,902,659</td>
<td>1,053,018</td>
<td>841,446</td>
<td>44%</td>
<td>849,581</td>
<td>46%</td>
</tr>
<tr>
<td>Ending Balance</td>
<td>297,119</td>
<td>297,119</td>
<td>1,236,233</td>
<td>(389,114)</td>
<td>-33%</td>
<td>(389,114)</td>
<td>-33%</td>
</tr>
</tbody>
</table>

Note: Actuals have changed since the day this screen shot was taken, so your “All Actuals” numbers will be slightly different.
Practice, practice, practice …

Back at your desk … open, run and print an “Budget Var – Approp Unit detail.xlt” report for your area’s 1RP rollup account.

You can do it!
Lab #2 – Use Dynamic Template

Scenario:

Your boss wants a report that shows the FY10 actual revenue and expenses for the rollup account 1RP1EAA. She wants the report to display the Actuals, Encumbrances, and Pre-encumbrances in the columns and the Objects in the rows.

Try to complete the lab without looking at the next slides! But if you need a hint, turn the page…
Lab #2 - Hints

1. Set dimension members in the Current View

2. Open Any-by-Any report template

3. Change Columns to display Category (leave Rows to display Object_Financial)

Tips:
* Leave Campus at “ALL_CAMPUSES”
* Leave Datasrc at “ALL_DATA_SOURCES”
* Leave Fund at “ALL_FUNDS_BY_NUMBER”
* Leave Measures at “PERIODIC”
Lab #2 – Check Current View

Session Information
- Logon: tkemper - STARappset

Current View:
- Application: FINANCIAL
- Campus: ALL_CAMPUSES
- Category: ALL_ACTUALS
- Datasrc: ALL_DATA_SOURCES
- Entity: 1RP1EAA
- Fund: ALL_FUNDS_BY_N
- Object_financial:
- RevenueAndExpe
- Time: 2010_TOTAL
- Measures: Periodic
Note: Actuals have changed since the day this screen shot was taken, so your numbers will be slightly different.
In conclusion…

• DO NOT FEAR! JUST TRY STUFF!

• You can’t really hurt anything – if you really mess up a report, just close it and try again!

• Don’t forget you can copy and paste data into a “plain ‘ole” Excel file, too.
Getting Help

• Quick Reference Guide
• Online Help in STAR
• STAR Instructions: http://budget.asu.edu/star-system-information
• Technical questions:
  – STAR administrators (Susan Belhassen and Tod Kemper): STARadmin@asu.edu or 480-727-0669