# OBI Financial Reporting Authority

**Grant Enterprise Reporting Authority:**

|-----------------------------|----------------------|-----------------------------|---------------------------------|-------------------------------|----------------------------------|
| Financial Reporting         | Basic Report Viewer  | Assign parent or specific child organization | Options include:  
• all projects and awards  
• specific projects  
• specific awards  
• specific principal owner | Options include:  
• Salary Data  
• Timecard Data  
• Basic Data | Options include:  
• Payroll and Labor Management  
• Payments and Expenditures |
| OR                          | Intermediate Ad Hoc User |                              |                                |                               |                                  |

### Notes:
1. Intermediate Ad Hoc users inherit Basic Report Viewer access.
2. If you define organizational scope at the school/business unit level (e.g., Law School), specific project and award options are not available.
3. The grantee will be able to see all accounts owned by the principal owner regardless of the organization scope defined.
4. Timecard Data and Basic Data limits are inherited when you receive Salary Data.
5. Basic Data limit is inherited when you receive Timecard Data.
### OBI Tool Access: Two Privileges

- **Basic Report Viewer**
  - View static or interactive reports delivered via OBI report catalogs and dashboards
  - Perform analysis through interactive reports using drill-down and drill-across functionality

- **Intermediate Ad Hoc User (Non-Publishers)**
  - Create analyses for themselves
  - Share analyses with other ad hoc users
  - Share analyses with information viewers (non-ad hoc users) via export to Excel, PDF, or PPT

*(Intermediate Ad Hoc Users inherit Basic Report Viewer Access)*
Data Access: Three Limits

1. **Salary Data**
   - Earnings information ($$)
   - Vacation liability ($$)

2. **Timecard Data**
   - Hours paid and worked
   - Timecard approval

3. **Basic Data**
   - Labor schedules
   - Leave accrual and balance
   - Expense Requests and SU Credit Card transaction detail and amount
   - Employee details
   - PTA details
   - Approval workflow information

*Timecard Data and Basic Data are inherited*

*Basic Data is inherited*
## Subject Areas Limits

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<thead>
<tr>
<th>Subject Area</th>
<th>Description</th>
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<tbody>
<tr>
<td>Payroll and Labor Management</td>
<td>Payroll and labor adjustments, labor schedules, labor schedule vs. actual, timecard and leave balances</td>
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| Payments and Expenditures          | • Expense Requests system transaction details and Stanford credit card transaction details  
• Consolidated expenditures (budget, actuals and commitments; iJournals)  
• Procure to Pay reporting (e.g., purchase requisitions, purchase orders, and invoice payments)  |
| Fund Management                    | • Beginning fund balance, activity (e.g., receipts, transfers, expenses) and fund balance reporting -- *target release date August 2017*       |
Available Resources

Step-by-step instructions for granting authority are available on the OBI Financial Reporting web site:

- Identify OBI Financial Reporting Authority Assignments within an Organization
- Grant Authority for OBI Financial Reporting Based on Organization, Project and/or Award, or Principal Owner