OBI Financial Reporting Authority

Grant Enterprise Reporting Authority:

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<tbody>
<tr>
<td>Financial Reporting</td>
<td>Intermediate Ad Hoc User(^1) OR Basic Report Viewer</td>
<td>Assign parent or specific child organization</td>
<td>Options include: • all projects and awards • specific projects(^2) • specific awards(^2) • specific principal owner(^3) Options include: • Salary Data (^4) • Timecard Data (^5) • Basic Data</td>
<td>Options include: Options include: • Payroll and Labor Management • Payments and Expenditures</td>
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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: Three Privileges

1. **Advanced Ad Hoc User (Publishers)**
   - Create analyses and publish in OBI for use campus-wide (currently project team members only)

2. **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

3. **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 Users inherit Basic Report Viewer access*
Data Access: Three Limits

1. Timecard Data and Basic Data are inherited
   - Earnings information ($$)
   - Vacation liability ($$$)

2. Basic Data is inherited
   - Hours paid and worked
   - Timecard approval

3. Basic Data
   - Labor schedules, leave accrual and balance
   - Expenditure transaction details
   - iJournal details
   - Employee details
   - PTA details
   - Approval workflow information
# Subject Areas Limits

<table>
<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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<tr>
<td>Payments and Expenditures</td>
<td>• Expense Requests system transaction details and Stanford credit card transaction details</td>
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<td>• Consolidated expenditures (budget, actuals and commitments; iJournals)</td>
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<td></td>
<td>• Procure-to-Pay Detail Reporting (target release date January 2017)</td>
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<tr>
<td>Revenue and Funds Management</td>
<td>(target release date August 2017)</td>
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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