OBI Financial Reporting Authority Model
# OBI Financial Reporting Authority

## Grant Enterprise Reporting Authority:

|-----------------------------|----------------------|-----------------------------|----------------------------------------------|----------------------------------|-----------------------------------|
| Financial Reporting         | Intermediate Ad Hoc User\(^1\) | Assign parent or specific child organization | 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 | Options include:  
  • Payroll and Labor Management  
  • Payments and Expenditures |
|                             | OR                   |                             |                                              |                                  |                                   |
|                             | Basic Report Viewer   |                             |                                              |                                  |                                   |

**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
   - Timecard Data:
     - Hours paid and worked
     - Timecard approval
   - 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

2. Basic Data is inherited

3. Salary Data
   - Earnings information ($$)
   - Vacation liability ($$)
Subject Areas Limits

<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll and Labor Management</td>
<td>Payroll and labor adjustments, labor schedules, labor schedule vs. actual, timecard and leave balances</td>
</tr>
<tr>
<td>Payments and Expenditures</td>
<td>Expense Requests system transaction details (e.g., expense reports, Stanford Travel Card transactions, advances, and petty cash replenishments) and Stanford Purchasing Card transaction details.</td>
</tr>
</tbody>
</table>
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