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About This Document:

Overview
This document will help you get started using the OBI (Oracle Business Intelligence) Reporting and Analysis Tools. For more information on OBI, please see FINGATE, “About OBI Financial Reporting”: http://web.stanford.edu/group/fms/gingate/finsystem/obi/index.html

A prerequisite for using the OBI System is that you have taken FIN-0340 Introduction to OBI Financial Reporting and have been granted OBI Reporting Authority in Authority Manager. The Evolve Financial Reporting (EFR) project is using OBI to evolve financial reporting by enabling high quality business decisions through an integrated set of reporting and analysis capabilities. OBI replaces the ReportMart3 (RM3) system that used predefined, static reports with download capability.

OBI Reporting Authority in Authority Manager is divided into two types:

- **Report Viewer authority**: Pre-defined and interactive reports for administrative and financial staff
- **Intermediate Ad Hoc authority**: Robust and dynamic ad hoc analyses for budget officers and experienced financial analysts
These are the areas in OBI that offer both dashboards and ad hoc reporting capabilities:

<table>
<thead>
<tr>
<th>OBI Dashboard</th>
<th>Reporting Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Reporting Directory</td>
<td>A comprehensive list of all OBI dashboard reports and standalone reports, many of which are one-to-one conversions from ReportMart3.</td>
</tr>
<tr>
<td>Consolidated Expenditure Reporting</td>
<td>Expenditure balance and details, iJournals details, trend and variance reports and commitment details</td>
</tr>
<tr>
<td>Expense Requests and SU Card Activity</td>
<td>Expense Requests system transaction details (expense reports, reimbursements, advances, non-PO payments, and petty cash replenishment) and Stanford credit card transaction details (PCard / TCard)</td>
</tr>
<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>Procure to Pay</td>
<td>A comprehensive suite of reports for all aspects of the purchasing process: Requisition to Purchase Order to AP Invoice to Supplier Payments, including new perspectives on approvals, suppliers, trends and invalid PTAs. CER reports drill into P2P transaction details.</td>
</tr>
<tr>
<td>Reference Data Inquiry</td>
<td>1. PTA Reference Data – including configuration, setup, fund authorization and transaction control.</td>
</tr>
<tr>
<td></td>
<td>2. Expenditure Type and Object Code Search</td>
</tr>
<tr>
<td></td>
<td>3. Organizational Hierarchy and OBI Authority Grantors</td>
</tr>
<tr>
<td>Revenue and Fund Management</td>
<td>Beginning fund balance, activity (e.g., receipts, transfers, expenses) and fund balance reporting</td>
</tr>
</tbody>
</table>

For more information from general-interest materials that are applicable across the spectrum of the system, to dashboard-specific materials and short How To videos, see FINGATE, RESOURCES.
1. Accessing the System

*(Only Firefox browser should be used)* - Go to http://bi.stanford.edu and log in using your SUNet ID and password. You can select Dashboards or Ad Hoc Reports there.

2. Accessing a Dashboard

Go to the Dashboards menu and select the desired dashboard, for example, the “Consolidated Expenditure Reporting” dashboard under the Finance business function.

After accessing the dashboard, reports are accessed via the tabs at the top or via links in the Home Page (which may include additional reports). Select a report category to enter the report criteria. Where available, you can select the link at the top or the tab in the table. To learn more about report uses, please see FINGATE, “Report Overviews”: http://web.stanford.edu/group/fms/fingate/finsystem/obi/report.html
3. Entering Search Criteria

You must follow the instructions at the top of the Selection Criteria to obtain results. If you do not receive results, please check the instructions to be sure you are following them. You can use Reset to CLEAR ALL or reset to default or last applied values.

4. Entering your Selection Criteria

You can type directly or paste a data element or list in the criteria field by clicking there first. - Click on the drop down arrow on the right to show the list and to access More/Search...
5. Using the More/Search… dialog page
   a. Select a Search Option (default is "Starts"): [Diagram]

   b. Enter the text for your search and deselect Match Case for broader results.
   c. Click Search or hit return to begin your search.
      Example below is **Organization** (The Organization Code is a combination of Org Code and name of organization.)
   d. The retrieved results will be shown on the left side of the screen.

   ![Diagram showing search options and results]

   e. **How to process the search**
      1. Click on the data elements you want for your report. Add additional lines by using Ctrl and Click. Add a range from the elements by using Shift and Click.
      2. Once selected, click on the single arrow pointed right to move your selections to the **Selected** area. You can move the entire list of results by clicking the double arrow facing right.
      3. To remove any or all data from the **Selected** area, use the left facing arrows to move one or more items or all items.
      4. Click on the **Pencil** in the upper right to **paste an Excel list**.
6. Generating the Report

Once you have entered your Search Criteria, select Apply. You may also select **Next** to view all the criteria available for this report.

<table>
<thead>
<tr>
<th>Expenditure Details</th>
<th>Journals</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Selection Criteria</strong> - Use this section to define the group you would like to analyze</td>
<td></td>
</tr>
<tr>
<td>To view results, select School/VP Budget Unit, Organization, Project Number, Task Number, Award Number, FTA or Award SPO Number and at least one data parameter.</td>
<td></td>
</tr>
<tr>
<td><strong>Help</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Help</strong></td>
<td></td>
</tr>
<tr>
<td>You can select <strong>Next</strong> to view the additional criteria available</td>
<td></td>
</tr>
</tbody>
</table>
7. Interactive Features of your report

**Modify the view**: Adjust your view by changing the view menus shown in your report. Changing the headings, reorganizes the columns and provides alternative viewing options.

a. **Changing the prompts, does not change the data, just the view.**

b. **Each report may have its own alternative views.**
8. Changing Columns on a report

How to Change Columns

a. Hover over a column to change the sorting order
b. Hover over a column to drag and drop to a new position
c. Within a Column, click on a blue hyperlink to drill down in a new window
d. Remember, you can only view data for which you have been granted access

Details for moving a column:

1. Hover over the column you wish to move. A bar will appear above the column. (If the bar doesn’t appear, the column cannot be moved.)
2. Grab the bar and drag it. As you’re dragging the column, another bar will display as a guide for placing the column.
3. Once the column is dragged to the correct location (bar displays where you want the column to be), release to place it.

Details when right-clicking on a column:

Right-clicking on the column brings up these choices:

- Show Subtotal
- Show Row level Grand Total
- Exclude column
- Include column
- Move Column
9. Printing and Exporting Your Report

Printing and exporting can be done for an individual report, an entire page, or an entire dashboard. For an individual report, use the Print or Export options below the report.

10. Customization and Saving Settings

You can save report settings (search criteria, views, and column sorting and position) by using the Customization menu available from the Page Options menu.

Clicking **Save Current Customization** allows you to name your saved Customization.