

The background features a large, light gray watermark of the Stanford University seal. The seal is circular and contains a redwood tree in the center. The text "LELAND STANFORD JUNIOR UNIVERSITY" is written around the top inner edge, and "DIE LUFT DER FREIHEIT MEHT" is written around the bottom inner edge. The year "1891" is at the bottom, and several stars are scattered around the inner border.

OBI Financial Reporting Authority Model

March 19, 2019

OBI Financial Reporting Authority

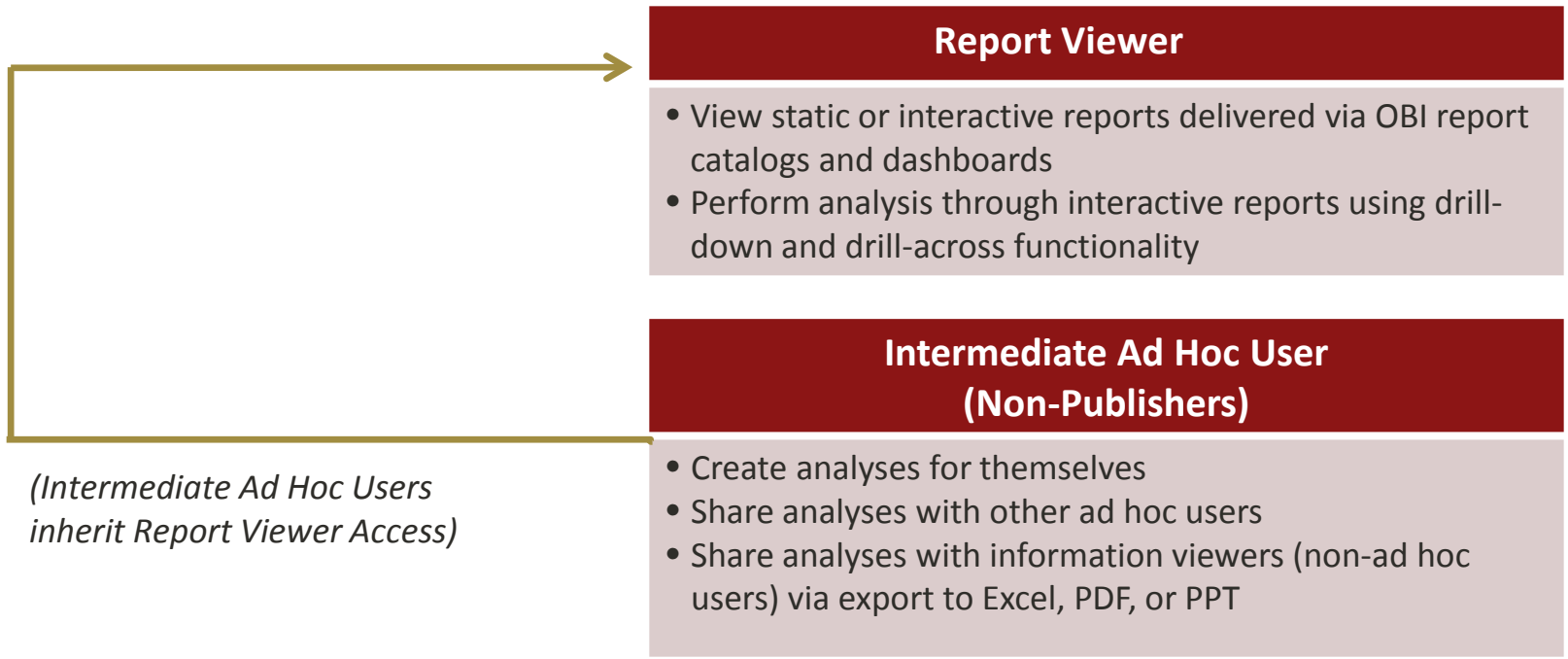
Grant Enterprise Reporting Authority:

1. Assign Business Function	2. Assign a Privilege A	3. Define Organization Scope	4. Define Limits for PTA or Principal Owner Scope	5. Define Limits for Data Access B	6. Define Limits for Subject Areas C
Financial Reporting	Report Viewer OR Intermediate Ad Hoc User ¹	Assign parent or specific child organization	Options include: <ul style="list-style-type: none"> • all projects and awards • specific projects² • specific awards² • specific principal owner³ 	Options include: <ul style="list-style-type: none"> • Salary Data ⁴ • Timecard Data ⁵ • Basic Data 	Options include: <ul style="list-style-type: none"> • Payroll and Labor Management • Payments and Expenditures

Notes:

1. Intermediate Ad Hoc users inherit 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.

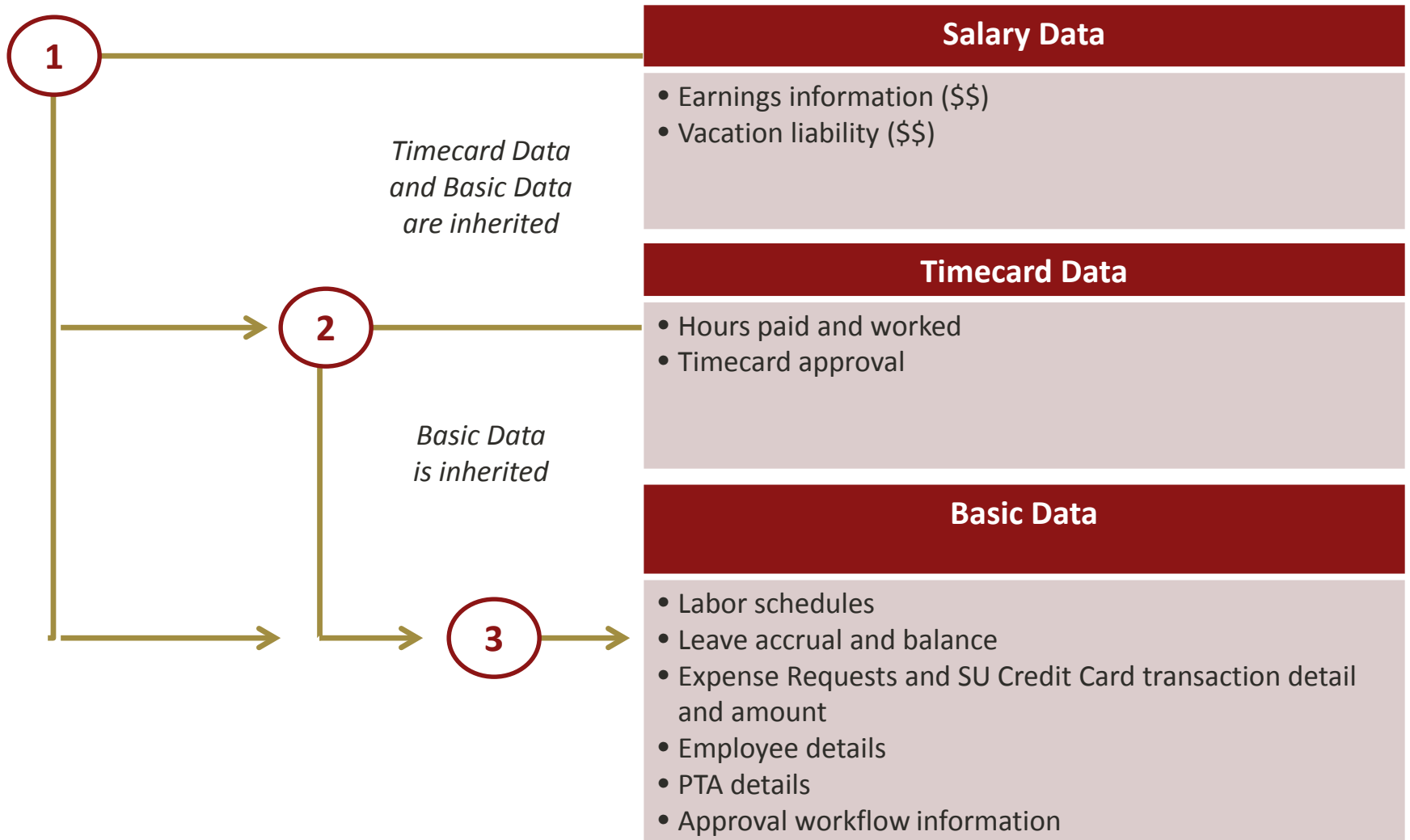
A OBI Tool Access: Two Privileges



Authority may look like this:

Enterprise Reporting					
Stanford University (AA00)		Limits & Conditions	Status	Grantable	Revoke
Financial Reporting	Intermediate Ad Hoc User ⓘ Granted On: 09-Dec-2015 Edited By: ██████████	<u>Limits:</u> Scope: All projects and tasks Scope: All awards Data Access: Basic Data, Central Data, Salary Data, Timecard Data Subject Areas: Funds and Expenditures, Payroll and Labor, IOU Historical <u>Conditions:</u> While at Stanford	active	✓	
	Report Viewer ⓘ Granted On: 08-Feb-2016 Edited By: ██████████	<u>Limits:</u> Scope: All projects and tasks Scope: All awards Data Access: Basic Data, Central Data, Salary Data, Timecard Data Subject Areas: Funds and Expenditures, Payroll and Labor, IOU Historical <u>Conditions:</u> While at Stanford	active	✓	

B Data Access: Three Limits



C Subject Areas Limits

Subject Area	Description
Payroll and Labor Management	Payroll and labor adjustments, labor schedules, labor schedule vs. actual, timecard and leave balances
Funds and Expenditures (includes what was called Payments and Expenditures)	<ul style="list-style-type: none">• 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)• Beginning fund balance, activity (e.g., receipts, transfers, expenses) and fund balance. <i>Release Date August 11, 2017</i>

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](#)



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Streamlined solutions. Stellar support.