

# OBI Financial Reporting > Quick Start Guide

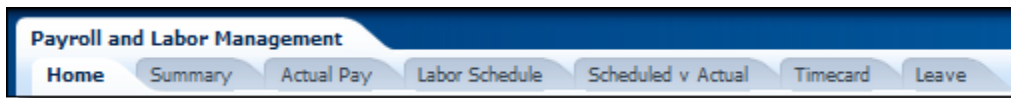
## Running a Report

Follow these steps to run and view predefined financial reports in OBI.

1. Go to <http://bi.stanford.edu> and log in using your SUNet ID and password.
2. Go to the "Dashboards" menu and select the appropriate dashboard, for example, the "Payroll and Labor Management" report dashboard under the Finance business function.



3. If there are multiple tabs on the dashboard, select a report category from the tabs.



4. Complete one or more report criteria using the prompts.

Selection Criteria - Use this section to define the group you would like to analyze

Prompts marked with an asterisk \* are mandatory. If Apply button is greyed out, it indicates that one or more mandatory fields are blank.

School/VP Budget Unit	--Select Value--	Project Number	--Select Value--	Employee ID	--Select Value--	* Timecard Punch Start Date	06/15/2013
Organization	--Select Value--	Task Number	--Select Value--	Employee Name	--Select Value--	* Timecard Punch End Date	07/15/2013
Organization Perspective	--Select Value--	Award Number	--Select Value--				

Apply Reset

- Note the information about mandatory fields and other guidelines above the prompts.
- For best accuracy and system performance, use the Search feature in the drop-down menus, especially for an Organization code, since the "Organization" field requires a combination of Org code and name.
- Apply will search based on the information entered in the fields.
- The Reset button provides a drop-down menu with three options: going back to last applied values, default values, or clearing all.

5. Click Apply. The report(s) will run.

## Interactive Features

Reports have several interactive features that allow you to modify how data is displayed and drill down to more data.

**Actual Pay**  
Actual Pay for Pay Period between 09/15/2011 and 09/30/2011  
Time run: 8/19/2013 2:19:40 PM

Organization Perspective: Work Assignment Org | Time Period Type: Pay Period End Date | Subtotal by: Earnings Type

See Actuals By: Employee - Pivot Table view

**Callouts:**  
 - Select from view menus to modify how data is displayed.  
 - Click a column title to reverse the sorting order, or move the cursor just above the title, and drag the column to a new position.  
 - Click on any blue hyperlink to drill down to more data.

Employee Name	Assignment Number	Work Assignment Org	Project	Task	Award	PayGroup	9/15/2011	9/15/2011	9/15/2011
Jolie, Angelina	05144428~0	AAAA-ABC	1111111	100.121	AAAAA	EX1-Exempt Salaried	\$3,625.00	\$3,625.00	\$7,250.00
							\$50.00	\$50.00	\$50.00
<b>Total</b>							<b>\$3,675.00</b>	<b>\$3,625.00</b>	<b>\$7,300.00</b>
Pitt, Brad	05280801~0	AAAA-ABC	1111111	1	AABNM	SAL-Salary	\$3,168.50	\$2,583.55	\$5,752.05
						SOV-Salary On Vacation SOV		\$584.95	\$584.95
						VCR-Vacation Salary Credit VCR		-\$584.95	-\$584.95
<b>Total</b>							<b>\$3,168.50</b>	<b>\$3,168.50</b>	<b>\$6,337.00</b>

By right clicking a column or a prompt, you have several options to reconfigure a report by sorting, excluding, including, or moving a column. You can even move a column to the view area and create a custom prompt.

**Scheduled Labor Expenditures and Actual**  
Scheduled Labor Expenditures and Actual  
Time run: 8/13/2013 5:06:38 PM

Award: AABEA

**Callouts:**  
 - 1 Drag and drop a column to create a prompt.  
 - 2 Right click over the prompt to display several options, including moving the column back.

Project	Work Assignment Org	Task	Award	Expenditure Type	Source	Earnings Amount Actual	Earnings Amount Scheduled
1111111	AAAA-ABC	1	AAAAA	51525	Schedule Distribution	\$2,528.66	\$2,528.66
						\$2,528.66	\$2,528.66
						\$2,362.50	\$2,362.50
						\$2,362.50	\$2,362.50
						\$5,962.20	\$5,962.20
						\$5,962.20	\$5,962.20
Jolie, Angelina	55555555	1	AAAAA	51515	Schedule Distribution	\$5,120.50	\$5,120.50
						\$5,120.50	\$5,120.50
						\$2,363.31	

**Actual Pay**  
Actual Pay for Pay Period between 09/15/2011 and 09/30/2011  
Time run: 8/14/2013 3:48:59 PM

Organization Perspective: Work Assignment Org | Time Period Type: Pay Period End Date | Subtotal by: PayGroup

See Actuals By: Employee - Pivot Table view

**Callouts:**  
 - The Subtotal by view prompt allows multiple table configurations.

Employee Name	Assignment Number	Work Assignment Org	Project	Task	Award	PayGroup	9/15/2011	9/15/2011	9/15/2011
Jolie, Angelina	11111111~0	AAAA-ABC	1111111	1	AAAAA	EX1-Exempt Salaried	\$3,625.00	\$3,625.00	\$7,250.00
			1111111	100.121	AAAAA	EX1-Exempt Salaried	\$50.00	\$50.00	\$50.00
<b>Total</b>							<b>\$3,675.00</b>	<b>\$3,625.00</b>	<b>\$7,300.00</b>
Pitt, Brad	11111111~0	AAAA-ABC	1111111	1	AAAAA	EX1-Exempt Salaried	\$3,168.50	\$2,583.55	\$5,752.05
			1111111		AAAAA	EX1-Exempt Salaried		\$584.95	\$584.95
<b>Total</b>							<b>\$3,168.50</b>	<b>\$3,168.50</b>	<b>\$6,337.00</b>

## Printing and Exporting

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.

Work Assignment Org	Earnings Type Code	9/15/2011	9/30/2011	Total
AAAA-ABC	BDS	\$282.23		<b>\$282.23</b>
	BVS	\$525.46		<b>\$525.46</b>
	FLX	\$50.00	\$50.00	<b>\$100.00</b>
	VCR	-\$2,834.17	-\$6,131.04	<b>-\$8,965.21</b>
	VCS	\$2,834.17	\$6,131.04	<b>\$8,965.21</b>
	WEL	\$200.00		<b>\$200.00</b>
AAAA-ABC		<b>\$105,297.96</b>	<b>\$105,047.96</b>	<b>\$210,345.92</b>
<b>Grand Total</b>		<b>\$105,297.96</b>	<b>\$105,047.96</b>	<b>\$210,345.92</b>

Refresh - Print - Export

- PDF
- Excel
- Powerpoint
- Web Archive (.mht)
- Data

Use this Print or Export menu for an individual report.

Refresh

Labor Schedules

For a page or dashboard, use the Page Options menu.

**STANFORD UNIVERSITY BIUAT** Search All Advanced Administration Help Sign Out

Payroll and Labor Management E Gonzalez

Home Summary Actual Pay Labor Schedule Schedule

Organization Perspective Work Assignment Org Award Number --Select Value--

Export Current Page Export to Excel Refresh Add To Briefing Book Create Bookmark Link Create Prompted Link

Apply Saved Customization Save Current Customization... Edit Saved Customizations... Clear My Customization

Actual Pay Overview  
Actual Pay Overview for Pay Period between 09/01/2011 and 09/30/2011  
Time run: 8/9/2013 3:54:42 PM

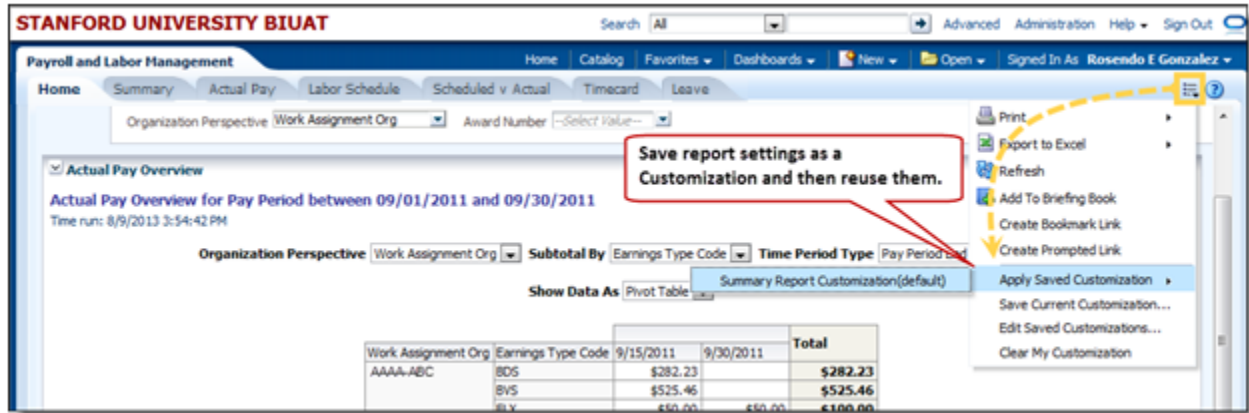
Organization Perspective Work Assignment Org Subtotal By Earnings Type Code Time Period Type Pay Period End

Show Data As Pivot Table

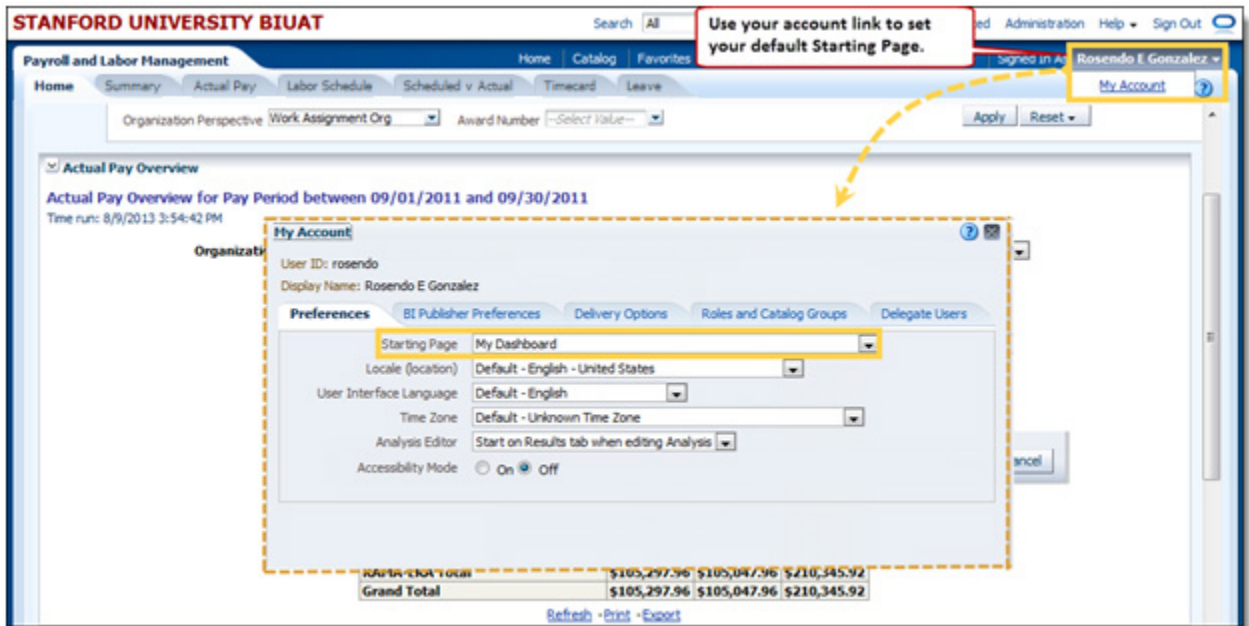
Work Assignment Org	Earnings Type Code	9/15/2011	9/30/2011	Total
AAAA-ABC	BDS	\$282.23		<b>\$282.23</b>
	BVS	\$525.46		<b>\$525.46</b>
	FLX	\$50.00	\$50.00	<b>\$100.00</b>

## 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.



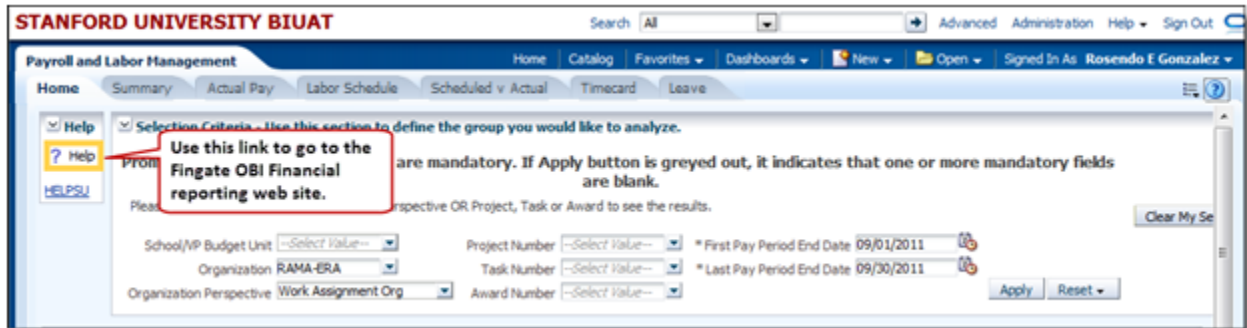
You can use your account link to specify the Starting Page you see when you log into OBI PLM reports.



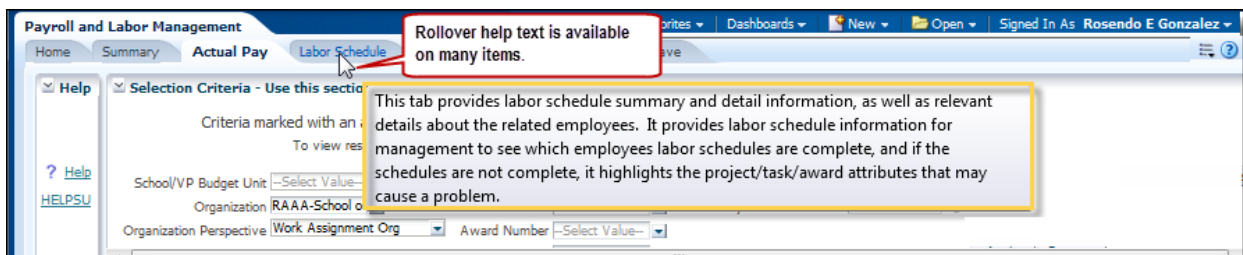
## Using Help

There are four help options in OBI financial reporting.

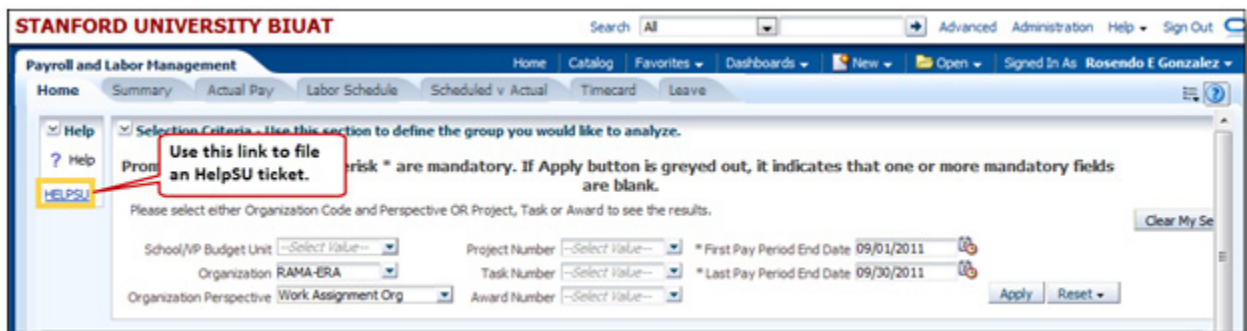
1. Click the Help link in your browser to be taken to the FINGATE OBI Financial Reporting web site which contains several help resources.



2. You can rollover items to view context-specific help text.



3. Use the HELPSU link to launch the HelpSU site to file a help ticket.



4. Oracle documentation about general OBI functionality

