# OBI Financial Reporting > Quick Start Guide

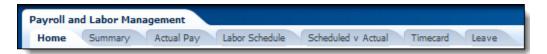
### **Running a Report**

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

- 1. Go to <a href="http://bi.stanford.edu">http://bi.stanford.edu</a> 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.

Dashboards 👻 📑 New 👻 📄 Open 👻	Signed In As
🛅 Most Recent(Payroll and Labor Manageme	ent - Summary)
🛅 My Dashboard	
□ Authority	
급 Authority	
Finance	
🛅 Payroll and Labor Management	

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.

$\cong$ Selection Criteria - Use this section to define the group you would like to analyze										
Prompts marked with an asterisk	$\mathbf{x}^*$ are mandatory. If Apply button is greyed out, it indicates that	one or more mandatory fields are blank.								
School/VP Budget UnitSelect Value 💌	Project NumberSelect Value   Employee IDSelect Value   * Time									
OrganizationSelect Value	Task NumberSelect Value 🗵 Employee NameSelect Value 💌 * Tim	ecard Punch End Date 07/15/2013								
Organization Perspective	Award Number	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.

ime run: 8/19/2013 2	<b>`</b>						by Earnings Type		
Select from view menus to modify	Organization	Perspective Work Assign	Click on an blue hype	· ·					
how data is displayed.				Click a col sorting or	9/15/2011	to drill down to more data.			
Employee Name	Assignment Number	Work Assignment ح. Org رامان	🗢 Proje	-	title, an	d drag the column to			
Jolie, Angelina	05144428~0	AAAA-ABC	1025	a new pos	ation.	J	\$3,625.00	\$3,625.00	\$7,250
oone, Angelina			107020	01 100.121	CABIB	OTH-Other Comp	\$50.00		\$50
		Total					\$3,675.00	\$3,625.00	\$7,300
	Total						\$3,675.00	\$3,625.00	\$7,300
Pitt, Brad	05280801~0	05280801~0 AAAA-ABC 1025909		09 1	AABNM	SAL-Salary	\$3,168.50	\$2,583.55	\$5,752
						SOV-Salary On Vacation SOV		\$584.95	\$584.
						VCR-Vacation Salary Credit VCR		-\$584.95	-\$584.

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.

	Labor Expenditures and A 3/2013 5:06:38 PM	Actual						<b>1</b> Dra	g and drop a		
	2 Right click over	Award	AABEA		-			colum prom	n to create a ot.	F	
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1111111 R/				le column	۲	1	ААААА	51525	Schedule Distribution		\$2,528.66
	moving the column	а	Move	Column	۲	1			Schedule Distribution Schedule Distribution		\$2,528.66 \$2,362.50
	back.			9/30/2011		1			Schedule Distribution Schedule Distribution		\$2,362.50 \$5,962.20
			55555555	9/30/2011		1	AAAAA		Schedule Distribution		\$5,962.20
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				9/30/2011		1		51515	Schedule Distribution	\$5,120.50	\$5,120.50
								51555	Schedule Distribution	\$2,363.31	

Actual Pay ctual Pay for Pa me run: 8/14/2013	ay Period betw	ne <i>Subtotal by</i> v ultiple table cor		•	llows				
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Jolie, Angelina			1111111	100.121	ААААА	EX1-Exempt Salaried	\$50.	00	\$50.00
		Total					\$3,675.0	00 \$3,625.00	\$7,300.00
	Total						\$3,675.0	00 \$3,625.00	\$7,300.00
Pitt, Brad	11111111~0	AAAA-ABC	1111111	1	ААААА	EX1-Exempt Salaried	\$3,168.	50 \$2,583.55	\$5,752.05
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ria, braa		Total							
na, brau		Total					\$3,168.5	50 \$3,168.50	\$6,337.00



# 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		\$282.23		
	BVS	\$525.46		\$525.46		
	FLX	\$50.00	\$50.00	\$100.00		
	VCR	-\$2,834.17	-\$6,131.04	-\$8,965.21		
	VCS	\$2,834.17	\$6,131.04	\$8,965.21		
	WEL	\$200.00		\$200.00		
AAAA-ABC		\$105,297.96	\$105,047.96	\$210,345.92		
Grand Total		\$105,297.96	\$105,047.96	\$210,345.92		
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individual repo	ort.	🗿 Pov	werpoint	•		
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For a page or dashboard, use the Page Options menu.

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Organization Perspective Work Assignment	t Org 💌 Ann	and NumberSelect 10	ele-			8	Print		
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Actual Pay Overview for Pay Period between Time run: 8/9/2013 3:54:42 PM Organization Perspective			Earnings Type	Code 💌 Time	e Period Type Pay Pe		Add To Briefing Book Create Bookmark Link Create Prompted Link		
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	AAAA-ABC	BDS	\$282.23	-	\$282.23				
A		BVS FLX	\$525.46		\$525.46				

#### **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.

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Time run: 8/9/2013 3:54:42 PM						$\sim$ !	Create Bookmark Link		
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		Show Data A	s Pivot Table	Summary Re	port Customization	n(default)	Apply Saved Customi	zation 🔸	
		Show Data P	a Phot Table				Save Current Custom	ization	
		-			Total		Edit Saved Customiza	tions	
	Work Assignment Org			9/30/2011			Clear My Customization	n	
	AAAA-ABC	BDS	\$282.23		\$282.23				1
		BVS	\$525.46		\$525.46				
			\$50.00	\$50.00	\$100.00				

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

Payroll and Labor Management				D		Out 🤤
Home Summary Artual Day		Home Catalog Favorites	your default Starting	Page.	gred in Ag Rosendo E Gonz	alez -
Home Service & Home Lak	Labor Schedule Scheduled	v Actual Timecard Leave			My Account	3
Organization Perspective W	Vork Assignment Org 💌 🖉	ward NumberSelect Value		Apply	Reset +	^
Actual Pay Overview Actual Pay Overview for Pay Period	iod between 09/01/2011	and 09/30/2011	e e e e e e e e e e e e e e e e e e e			1
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	Starting Page Locale (location) User Interface Language Time Zone Analysis Editor	My Dashboard				
	Accessibility Mode	n \$105,297.36	\$105,047.96 \$210,345.92		ancel	
	Grand Total	\$105,297.96 t Refresh -Print -Export	\$105,047.96 \$210,345.92			

# **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.

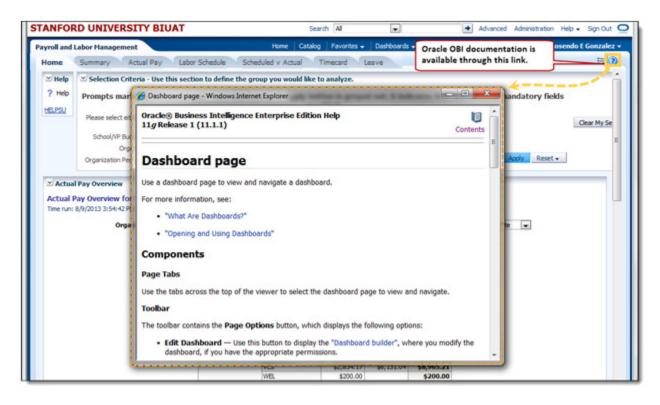
STANFORD UNIVERSITY BIUAT	Search Al	•	Advanced Administr	ation Help 🗸 Sign Out 🧲
Payroll and Labor Management Home Home Summary Actual Pay Labor Schedule Scheduled v Actual	Catalog Favorites - Timecard Leave		🖌   🚵 Open 🖌   Signed In /	As Rosendo E Gonzalez 🕶
Help     Selection Criteria - Lice this section to define the group you wo     Use this link to go to the     From     Fingate OBI Financial     reporting web site.     repective OR Project, Task o	pply button is greyed are blank.		one or more mandatory	y fields Clear My Se
Organization RAMA-ERA 🔳 Task Number		First Pay Period End Date 09/0 Last Pay Period End Date 09/3	0/2011	E

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

Payroll and Labor Management	Rollover help text is available	orites 🔹   Dashboards 🕶   🦉 New 🔹   🗁 Open 👻   Sig	gned In As Rosendo E Gonzalez -
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✓ Help     ✓ Selection Criteria - Use this section     Criteria marked with an a     To view res     School/VP Budget Unit <u>-Select Value-</u> Organization RAAA-School o     Organization Perspective Work Assignme	This tab provides labor schedule sum details about the related employees. management to see which employee schedules are not complete, it highlig cause a problem.	mary and detail information, as well as relevant It provides labor schedule information for It slabor schedules are complete, and if the ghts the project/task/award attributes that may	

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

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4. Oracle documentation about general OBI functionality