



<b>Title:</b>	<b>Enhanced Reporting: Human Resources Dashboard</b>	<b>Document ID: OBI_v12</b>
		<b>Date Modified: 06/26/2017</b>

**Purpose:** The Human Resources Dashboard provides enhanced reporting capabilities for Human Resources and Payroll data.

**For questions, contact:** Employee Service Center (ESC), 740-593-1636, [uhr@ohio.edu](mailto:uhr@ohio.edu).

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## ORACLE BUSINESS INTELLIGENCE (OBI)

Oracle Business Intelligence (OBI) is a web-based reporting tool used to support the campus community's academic and administrative offices. With OBI, you can pull data in a dashboard or a prebuilt report. Data can be viewed within OBI or you can export the data in a variety of formats for analysis.

## WHY DASHBOARDS?

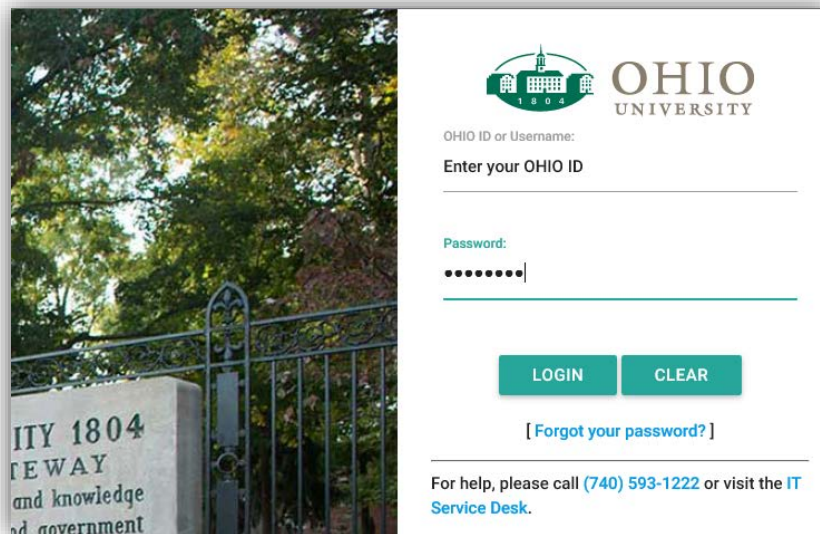
- Ease of use
- Retention of prompts
- Drill-down capabilities
- You may export data to CSV format to view additional fields (data columns)

## LOGIN TO OBI

1. To login to OBI, using Mozilla Firefox or Google Chrome, visit <https://obiprd.oit.ohio.edu>.

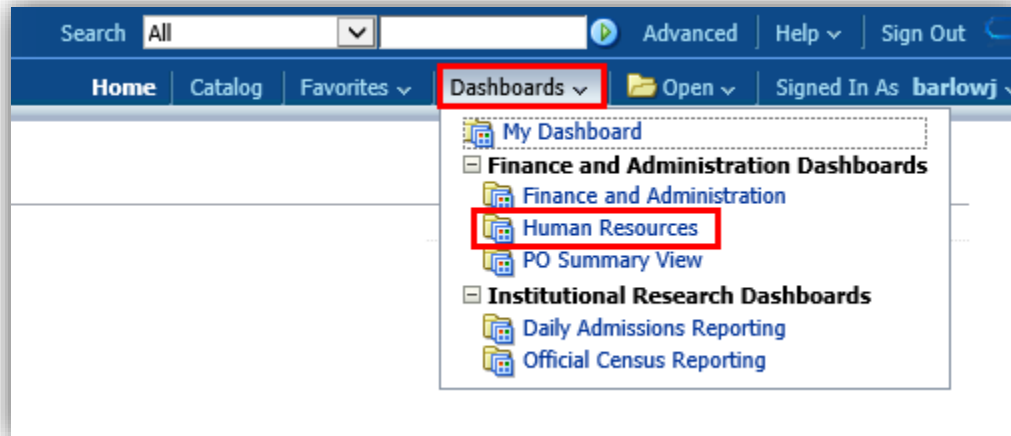
**WARNING: MICROSOFT EDGE IS NOT COMPATIBLE WITH OBI.**

2. Enter your **OHIO ID** and **Password** and click **Login**.

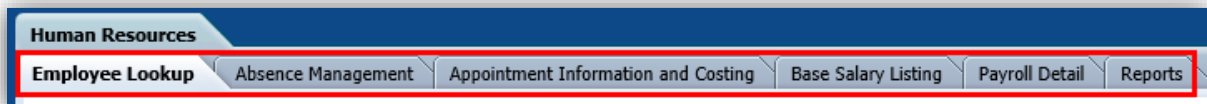


**NOTE:** You may be accustomed to accessing your reports by clicking *Catalog*. Now, instead click **Dashboards** (top right corner).

3. Click **Dashboards**. In the drop-down menu, under *Finance and Administration Dashboards*, click **Human Resources**.



4. Your *Finance and Administration Dashboard* includes *Dashboard Pages* or tabs that you can use to access different data. Each page features predefined queries that can be narrowed down to the data subset of your choice. The Reports tab offers additional pre-defined queries for ad hoc reports.



5. Click the desired dashboard **page/tab**:
  - Employee Lookup
  - Absence Management
  - Appointment Information and Costing
  - Base Salary Listing
  - Payroll Detail
  - Reports

## HUMAN RESOURCES DASHBOARD PAGES

**WARNING: STUDENT EMPLOYEES ARE NOT INCLUDED IN THIS DATA.**

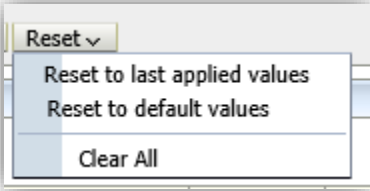





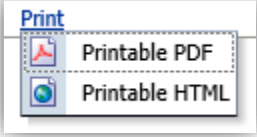
<p><a href="#">Employee Lookup</a></p>	<p>Employee Lookup includes basic employee-type information for OHIO employees.</p> <p>Use Employee Lookup:</p> <ul style="list-style-type: none"> <li>• To verify the accuracy of employee details</li> <li>• To lookup employee contact information, office location, general directory information, and Employee Number, etc.</li> <li>• To understand organizational hierarchy to ensure information is provided to appropriate individual within a unit</li> <li>• When processing Concur reports to lookup people to provide accurate information as to whether the individuals are employees or University guests when attending business meetings, etc.</li> </ul>
<p><a href="#">Absence Management</a></p>	<p>Absence Management details the paid time off (PTO) salaried employees have taken in the current fiscal year and their remaining balances.</p> <p>Use Absence Management:</p> <ul style="list-style-type: none"> <li>• For employee management and oversight</li> <li>• To verify employee PTO accrual balances and usage</li> <li>• For payout calculations (sick/vacation)</li> </ul>
<p><a href="#">Appointment Information and Costing</a></p>	<p>Queries employee appointment information for specified Organization(s) and/or Planning Unit with any earnings for a specified Fiscal Year.</p> <p>Use Appointment Information and Costing:</p> <ul style="list-style-type: none"> <li>• For budgeting base</li> <li>• To view additional earnings elements employees are receiving</li> <li>• To ensure accuracy of split costed positions</li> <li>• To accurately fill out the Ohio University Appointment Form</li> </ul>

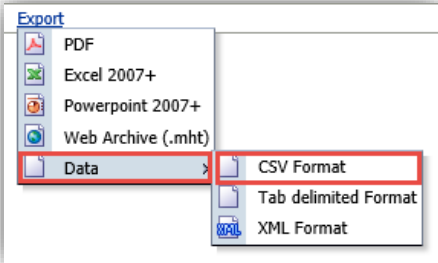
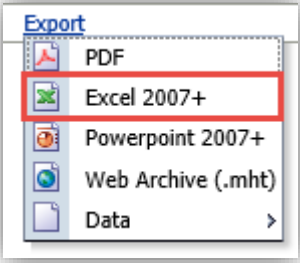
<p><a href="#">Base Salary Listing</a></p>	<p>Use Base Salary Listing:</p> <ul style="list-style-type: none"> <li>• With <i>Appointment Information and Costing</i> for budgeting</li> <li>• To find Position Numbers (PN) while going through the budget process</li> <li>• To accurately fill out the Ohio University Appointment Form</li> <li>• To verify the salary of an employee in your planning unit</li> <li>• To assist with the salary changes worksheet</li> <li>• To lookup Faculty Rank</li> </ul>
<p><a href="#">Payroll Detail</a></p>	<p>Formerly Payroll Expense Distribution System (PEDS)</p> <p>Use Payroll Detail:</p> <ul style="list-style-type: none"> <li>• For financial forecasting</li> <li>• To verify payroll accuracy</li> <li>• To view payroll transfer details (buyout charged to a grant)</li> </ul>
<p><a href="#">Reports</a></p>	<p>The Reports tab contains additional predefined queries for ad hoc reports requested by units. These are the reports that users have access to in the .Published &gt; Human Resources &gt; General HR reports.</p> <p>The Reports tab is also an easy way for users to navigate without using the <i>Catalog</i>.</p> <p>Use the Reports tab:</p> <ul style="list-style-type: none"> <li>• To access information not available in the dashboards</li> </ul>

## HELPFUL DEFINITIONS

Term	Definition
<b>Prompt</b>	A prompt allows you to see specific data according to the prompt selection.
<b>Enter Data</b>	Data prompts must contain correct values.
<b>Search Parameters</b>	Search parameters are determined by the <i>Prompts</i> that you select/enter.
<b>Drill-Down</b>	<p>Drill-down capability is available on the <i>Absence Management</i> dashboard page.</p> <p>To drill-down (verb) means to focus in on something. Drilling-down involves clicking on data at the summary level to reveal detailed information.</p> <p><b>NOTE:</b> When you drill-down in a dashboard, you do not have to re-run the analysis like you do for reports. You can use the breadcrumbs to navigate back to the summary level.</p>
<b>Breadcrumbs</b>	On a website, a breadcrumb trail is a navigation tool that allows a user to see where the current page is in relation to the website's hierarchy.
<b>Navigation</b>	Navigation is the process of navigating. To move on, over, or through information resources.
<b>Export</b>	Export is a command similar to File > Save As, but is typically used for more specific purposes. For example, instead of simply saving a file with a different name or different format, "Export" might be used to save parts of a file, create a backup copy of a file, or save a file with customized settings.
<b>Save Prompt</b>	Save prompt to save your customized <i>Prompts</i> for future use.

## NAVIGATION

Icon	Definition
<b>Apply</b>	Click to yield the data results based on the <i>Prompts</i> that you selected/entered.
<b>Reset</b>	
<b>Return</b>	Return to the previous page
	First 25 rows
	Previous 25 rows
	Next 25 rows
	All rows
<b>Refresh</b>	Refresh the results of the current analysis
	Sort ascending or sort descending
<b>Print</b>	

Export	To Data > CSV	To Microsoft Excel
		

## Employee Lookup

Employee Lookup includes basic employee-type information for OHIO employees.

Use Employee Lookup:

- To verify the accuracy of employee details
- To lookup employee contact information, office location, general directory information, and Employee Number, etc.
- When processing Concur reports to lookup people to provide accurate information as to whether the individuals are employees or University guests when attending business meetings, etc.
- To understand organizational hierarchy to ensure information is provided to appropriate individual within a unit

**WARNING: STUDENT EMPLOYEES ARE NOT INCLUDED IN THIS DATA.**

## Prompts

Prompt	Definition
<b>Planning Unit</b>	Click the checkbox to select one or more planning units.
<b>HR Organization</b>	HR Organization is the organization to which an employee is associated within their (UHR) employee record. Click the checkbox to select one or more organizations.
<b>Org Campus</b>	Click the checkbox to select one or more campuses.
<b>Location</b>	Click the checkbox to select one or more locations.



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<b>Job Category</b>	Click the checkbox to select one or more of the following: Administration, Classified, Faculty, or Research.
<b>Employee Number</b>	If you would like to search for a specific employee, enter the employee's number (6 digits).
<b>Last Name (Case Sensitive)</b>	If you would like to search for a specific employee, enter the employee's last name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case. Example: enter <b>Bobcat</b> .
<b>First Name (Case Sensitive)</b>	If you would like to search for a specific employee, enter the employee's first name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case. Example: enter <b>Rufus</b> .
<b>Supervisor (Case Sensitive)</b>	If you would like to search for employees who report to a specific person, enter the supervisor's last name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case.
Click <b>Apply</b> .	

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**WARNING: IF YOU HAVE SELECTED ONE OR MORE PROMPTS AND ARE NOT RECEIVING RESULTS, IT MAY BE THAT YOUR SELECTIONS ARE TOO RESTRICTIVE OR THEY CONTAIN INCORRECT VALUES.**

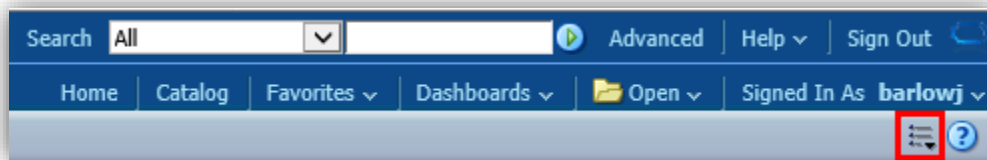
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The screenshot shows the 'Human Resources' dashboard with the 'Employee Lookup' tab selected. The 'Prompts' section includes filters for 'Planning Unit' (Honors College), 'HR Organization' (12010 DEAN HONORS TUTORIAL), 'Job Category' (a dropdown menu), 'Employee Number', 'Last Name' (contains any), and 'First Name' (contains any). Below the prompts is an 'Employee Lookup' table with columns: Full Name, Employee Number, PID Number, Title, Academic Title, Job Category, Email Address, Campus Address, Work Phone, and Planning Unit. At the bottom of the table are links for 'Refresh', 'Print', and 'Export'.

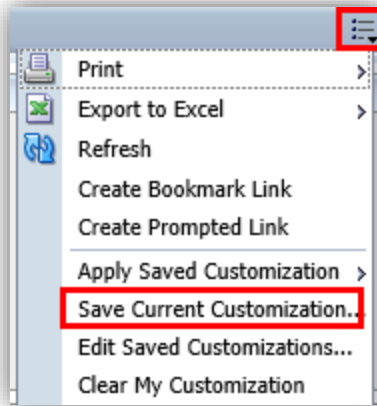
### Save Prompt

You can save your customized prompt for future use. When you save your prompt for future use, you may select a previously saved prompt and/or edit it.

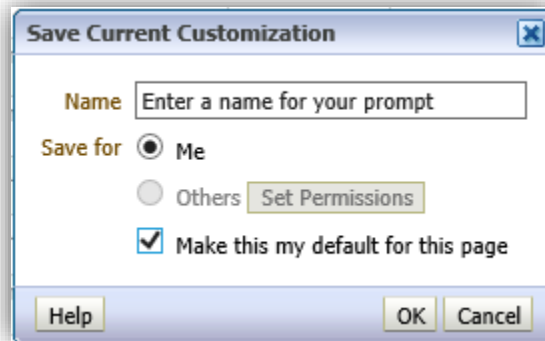
1. On the desired dashboard page, specify the desired **Prompts** and click **Apply** to yield the data results based on the *prompts* that you selected/entered.
2. To save your prompts, click the **Page Options**  drop down menu (top right – next to the *Help* icon).



3. Click **Save Current Customization**.



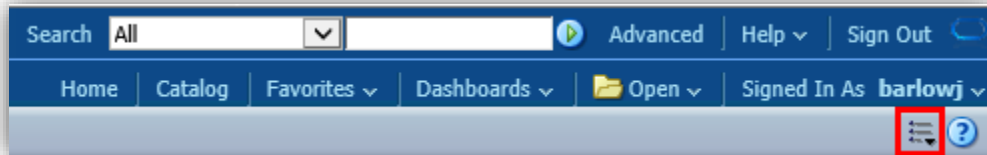
4. Enter a **Name** for your customized prompt that you will recognize. If you want your prompt to be the default for this dashboard page, next to *Make this my default for this page*, click the **checkbox**.



5. Click **OK**.

### Apply Saved Customization

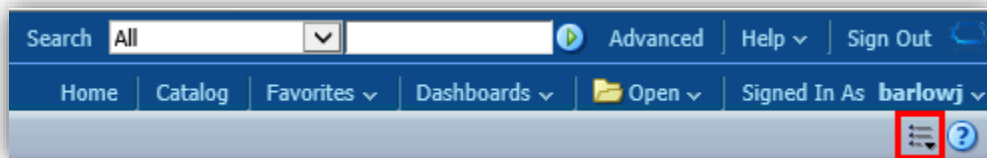
1. On the desired dashboard page, click the **Page Options**  drop down menu (top right – next to the *Help* icon).



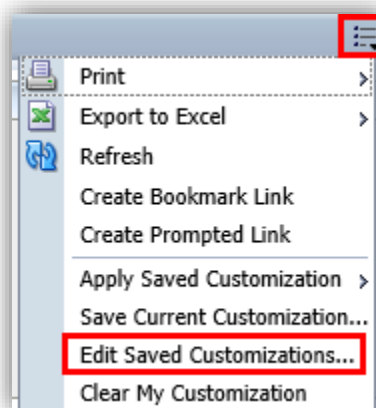
2. Trace to **Apply Saved Customization**, and click the desired (custom prompt's) **Name**. The saved customization will display.


### Edit Saved Customization

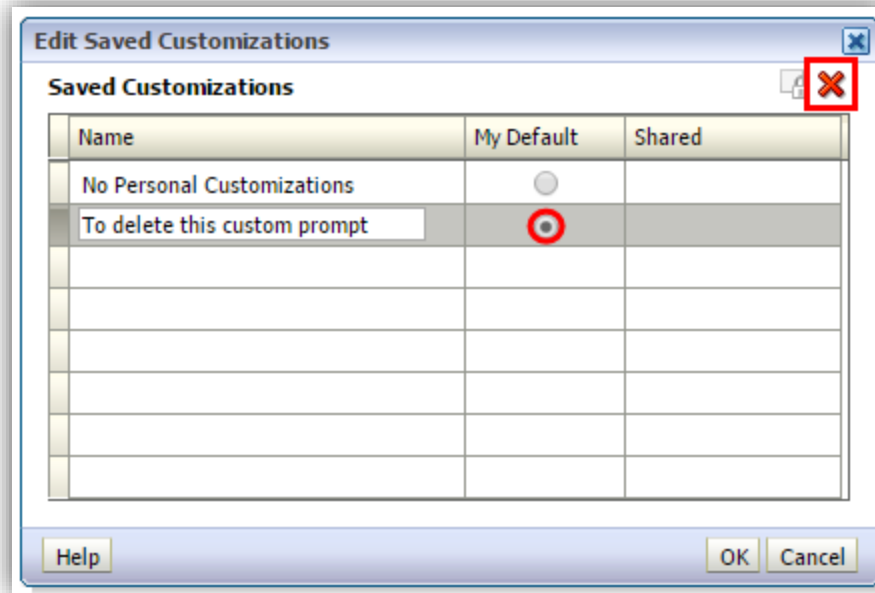
1. On the desired dashboard page, click the **Page Options**  drop down menu (top right – next to the *Help* icon).



2. Click **Edit Saved Customizations**.



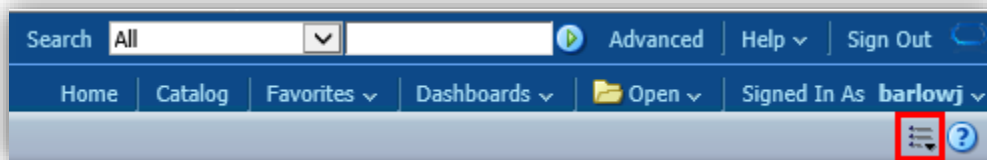
3. Rename or delete your saved customizations, as well as specify which Saved Customization, if any, should be used as your default for the current dashboard page. To delete a customization, click the **radio button** next to the appropriate custom prompt and click the .



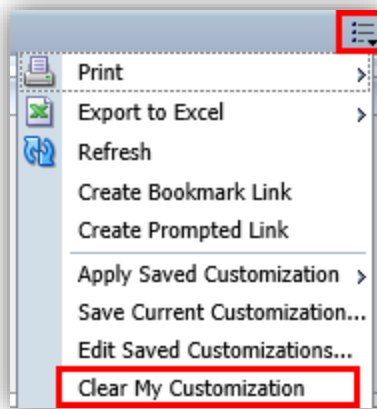
4. Click **OK**.

### Clear My Customization

1. On the desired dashboard page, click the **Page Options**  drop down menu (top right – next to the *Help* icon).



2. Click **Clear My Customization**.



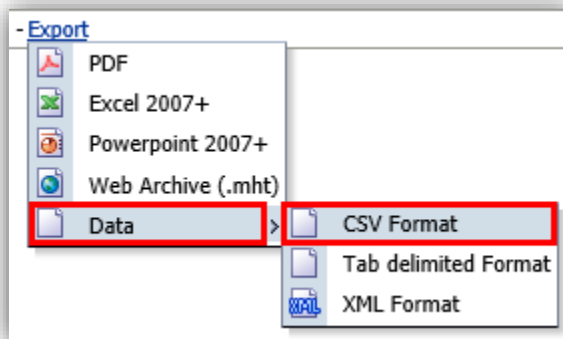
## Export Data for Further Manipulation and Analysis

### Export to CSV

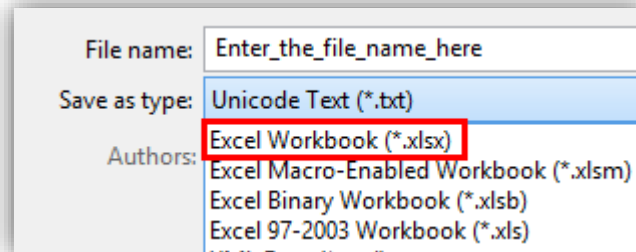
1. You may view the data directly within OBI, or you may export the data for further manipulation, formatting, and analysis. To export the data, click **Export**.

The screenshot shows the Oracle Business Intelligence interface for Human Resources. The main navigation bar includes 'Employee Lookup', 'Absence Management', 'Appointment Information and Costing', and 'Base Salary Listing'. The 'Employee Lookup' section contains several prompts: 'Planning Unit' (set to 'Honors College'), 'Organization' (set to '12010 DEAN HONORS TUTORIAL'), 'Job Category' (set to '--Select Value--'), 'Employee Number' (empty), and 'Last Name' (set to 'contains any'). Below the prompts is a table with columns: Full Name, Employee Number, PID Number, and Title. At the bottom of the interface, there are buttons for 'Refresh', 'Print', and 'Export'.

- 2. If you export to CSV, the cell/text format shown in OBI will not be exported to your file. The file will contain the raw data only. For example, cells will not be shaded and merged cells will be unmerged with values shown in each row. As a result, you can format the data as desired. To export the data to CSV Format, click **Export**, trace to **Data**, and click **CSV Format**. Upon confirmation, click **Open** to open the CSV file.



3. If you export data to CSV, spend time formatting the data, and wish to save your work, you must re-save the CSV file to Microsoft Excel to retain formatting. To retain formatting, from the **File** menu, click **Save As**. **Specify where you would like to save the file and enter a File name** that you will recognize. Under *Save as type*, click **Excel Workbook (\*.xlsx)**.



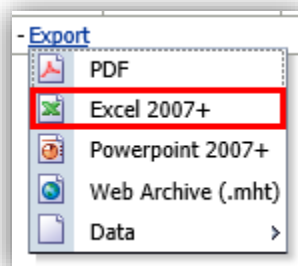
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**WARNING: BY DEFAULT, A CSV FILE IS SAVED AS TEXT ONLY. AS A RESULT, TO SAVE YOUR FORMATTING, YOU MUST RE-SAVE THE CSV FILE WITH A MICROSOFT EXCEL EXTENSION (.XLS\*).**

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### Export to Microsoft Excel

4. If you export to Microsoft Excel, it will maintain the OBI formatting that you see on your screen. To export the data to Microsoft Excel, click **Export** and then click **Excel 2007+**. Upon confirmation, click **Open** to open the Microsoft Excel spreadsheet.





Effective Date: 6/26/2017

## Absence Management

Absence Management details the paid time off (PTO) salaried employees have taken in the current fiscal year and their remaining balances.

Use Absence Management:

- For employee management and oversight
- To verify employee PTO accrual balances and usage
- For payout calculations (sick/vacation)

**NOTE:** You may be accustomed to accessing your reports by clicking *Catalog*. Now, instead click **Dashboards** (top right corner).

1. Click **Dashboards**. In the drop-down menu, under *Finance and Administration Dashboards*, click **Human Resources**.
2. Click the **Absence Management** tab.

## Prompts

Prompt	Definition
<b>Planning Unit</b>	Click the checkbox to select one or more planning units.
<b>HR Organization</b>	HR Organization is the organization to which an employee is associated within their (UHR) employee record. Click the checkbox to select one or more organizations.
<b>Org Campus</b>	Click the checkbox to select one or more campuses.
<b>Location</b>	Click the checkbox to select one or more locations.
<b>Job Category</b>	Click the checkbox to select one or more of the following: Administration, Classified, Faculty, or Research.
<b>Employee Number</b>	If you would like to search for a specific employee, enter the employee's number (6 digits).
<b>Last Name</b>	If you would like to search for a specific employee, enter the employee's last name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case. Example: enter <b>Bobcat</b> .
<b>First Name</b>	If you would like to search for a specific employee, enter the employee's first name. This field is case sensitive. The first letter



### PTO Current Balances and Usage

Faculty and Administrative **PTO Current Balances** display on the **LEFT**. Faculty and Administrative **PTO Usage** displays on the **RIGHT**.

- Totals are from the beginning of the Fiscal Year through today.
- Totals include Confirmed and Approved absences only.
- Includes PTO data for Administrative Staff and Faculty only. PTO usage and balances for hourly-paid staff must be viewed in Workforce.

### Drill-Down Capability

Drilling-down involves clicking on data at the summary level to reveal detailed information.

1. Under *Faculty and Administrative PTO Usage*, you may drill-down to see the absence details. To drill-down, under *Parental, Personal, Sickness, Vacation, or Total Usage*, click the desired **link** next to the appropriate employee's name.

People		Balances					Usage			Usage
Employee Number	Full Name	Parental Balance	Personal Balance	Sick Balance	Vacation Balance	Total Balance	Personal	Sick	Vacation	Usage
							8.00	8.00	120.00	136.00

The absence details will display the absence type, start/end date, number of hours, FMLA Flag, and FMLA Reason.

**NOTE:** When you drill-down in a dashboard, you do not have to re-run the analysis like you do for reports. You may use the breadcrumbs to navigate back to the summary level.

2. To navigate back to the summary level, click **Human Resources: Absence Management**.

**ORACLE Business Intelligence**

**Human Resources**

**Absence Management Detail**

Employee Number                      Full Name  
 Assignment Date                      Job Name  
 Title                                      Academic Title  
 Planning Unit                            HR Organization

Absence Type	Start Date	End Date	Absence Hours	FMLA Flag	FMLA Reason
Vacation			32.00	No	
Vacation			16.00	No	
Vacation			8.00	No	
Vacation			24.00	No	
Vacation			8.00	No	
Sickness			8.00	No	
Personal Leave			8.00	No	
Vacation			8.00	No	
Vacation			24.00	No	
			<b>136.00</b>		

Human Resources: Absence Management > Absence Management Detail

**NOTE:** On a website, a breadcrumb trail is a navigation tool that allows a user to see where the current page is in relation to the website's hierarchy.

### View or Export Data

You may view the data directly within OBI, or you may export the data for further manipulation, formatting, and analysis. See [Export Data](#).

## Appointment Information and Costing

Queries employee appointment information for specified Organization(s) and/or Planning Unit with any earnings for a specified Fiscal Year.

Use Appointment Information and Costing:

- For budgeting base
- To view additional earnings elements employees are receiving
- To ensure accuracy of split costed positions
- To accurately fill out the Ohio University Appointment Form

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**WARNING: STUDENT EMPLOYEES ARE NOT INCLUDED IN THIS DATA.**

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**NOTE:** You may be accustomed to accessing your reports by clicking *Catalog*. Now, instead click **Dashboards** (top right corner).

1. Click **Dashboards**. In the drop-down menu, under *Finance and Administration Dashboards*, click **Human Resources**.
2. Click the **Appointment Information and Costing** tab.
3. To query for more than one *Employee Number*, click the **down arrow** and click **More/Search**.

**Prompts**

Please select Fiscal Year plus a

\* **Fiscal Year**  
2017

**Planning Unit**  
--Select Value--

**Job Category**  
--Select Value--

**Employee Number**  
--Select Value--

- NULL
- 100009
- 100010
- 100011
- 100012
- 100013
- 100014
- 100015

More/Search...

4. Click the **Pencil** icon. 

**Select Values**

**Available**

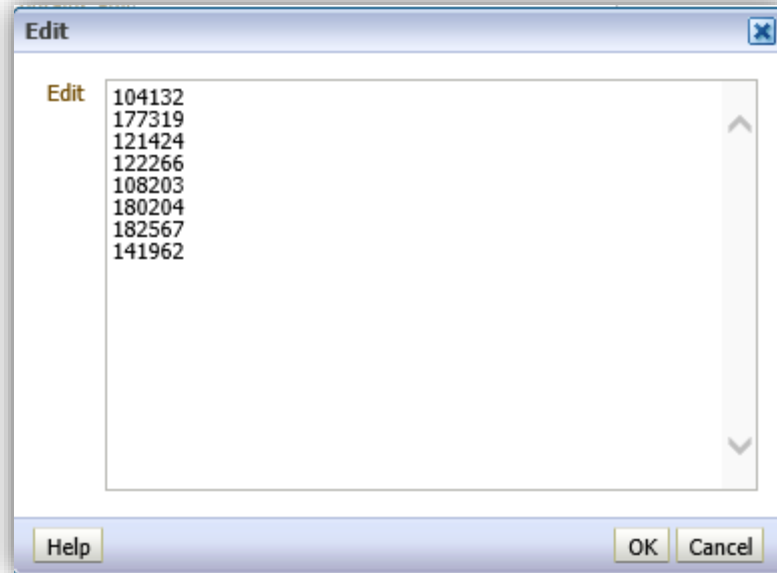
Name Starts

Search Match Case

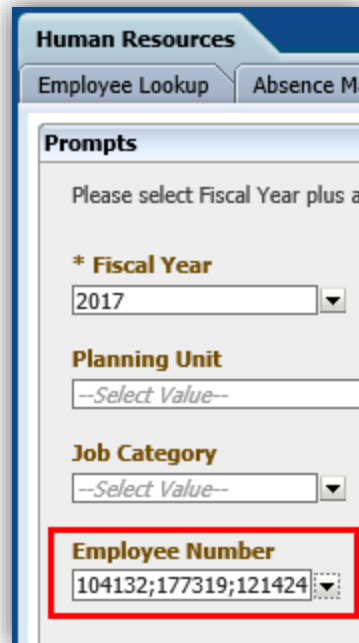
- NULL
- 100009
- 100010
- 100011
- 100012
- 100013

**Selected**

5. In the *Edit* field, paste the list of employee numbers to query.



6. Click **OK**. Click **OK**. The pasted list will display in the prompt.




7. Click **Apply**.

## Prompts

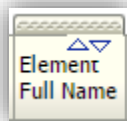
Prompt	Definition
<b>*Fiscal Year</b>	* Indicates this is a required field. <b>NOTE:</b> In addition to <i>Fiscal Year</i> , you must select at least one (1) additional prompt.
<b>Planning Unit</b>	Click the checkbox to select one or more planning units.
<b>HR Organization</b>	HR Organization is the organization to which an employee is associated within their (UHR) employee record. <b>NOTE:</b> If prompted by HR Organization, only the employees whose primary assignments are in the (prompted) <i>HR Organization</i> will display.  Click the checkbox to select one or more Human Resources (HR) organizations.
<b>GL Organization</b>	GL Organization is the organization to which an employee's payroll is costed.  Click the checkbox to select one or more General Ledger (GL) organizations. <b>WARNING:</b> If prompted by GL Organization and the employee is split-costed, only the amount costed to the (prompted) <i>GL Organization</i> will show. As a result, you would need to query both <i>GL Organizations</i> to see the entire cost picture.
<b>Org Campus</b>	Click the checkbox to select one or more campuses.
<b>Location</b>	Click the checkbox to select one or more locations.
<b>Job Category</b>	Click the checkbox to select one or more of the following: Administration, Classified, Faculty, or Research.
<b>Pay Basis</b>	Click the checkbox to select one or both of the following: Hourly or Salaried.
<b>Benefit Program Level</b>	Click the checkbox to select one or more benefit program levels.
<b>Element</b>	Click the checkbox to select one or more elements.
<b>Project</b>	Click the checkbox to select one or more elements.
<b>Employee Number</b>	If you would like to search for a specific employee, enter the person's employee number (6 digits). <b>NOTE:</b> To query for multiple employee numbers, click the <b>down arrow</b> and click



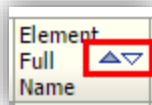
	<b>More/Search.</b> Click the <b>Pencil</b> icon  . In the <i>Edit</i> field, paste the list of employee numbers, and click <b>OK</b> .
<b>PID Number</b>	If you would like to search for a specific employee, enter the employee's PID number.
<b>Last Name (Case Sensitive)</b>	If you would like to search for a specific employee, enter the employee's last name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case. Example: enter <b>Bobcat</b> .
<b>First Name (Case Sensitive)</b>	If you would like to search for a specific employee, enter the employee's first name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case. Example: enter <b>Rufus</b> .
<b>Supervisor (Case Sensitive)</b>	If you would like to search for employees who report to a specific person, enter the supervisor's last name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case.
Click <b>Apply</b> .	

### Sort Element Full Name to View Costing Splits

1. To sort by *Element Full Name*, hover your mouse over the column heading. An up arrow and a down arrow will display.



2. To *Sort Ascending*, click the up arrow. To *Sort Descending*, click the down arrow.



**NOTE:** The split costing *Amount* and any *Remarks*.

## View or Export Data

You may view the data directly within OBI, or you may export the data for further manipulation, formatting, and analysis. See [Export Data](#).

## Base Salary Listing

Formerly “Employee List with Base Salary”

Use Base Salary Listing:

- With *Appointment Information and Costing* for budgeting
- To find Position Numbers (PN) while going through the budget process
- To accurately fill out the Ohio University Appointment Form
- To verify the salary of an employee in your planning unit
- To assist with the salary changes worksheet
- To lookup Faculty Rank

**WARNING: STUDENT EMPLOYEES ARE NOT INCLUDED IN THIS DATA.**

**NOTE:** You may be accustomed to accessing your reports by clicking *Catalog*. Now, instead click **Dashboards** (top right corner).

1. Click **Dashboards**. In the drop-down menu, under *Finance and Administration Dashboards*, click **Human Resources**.
2. Click the **Base Salary Listing** tab.

## Prompts

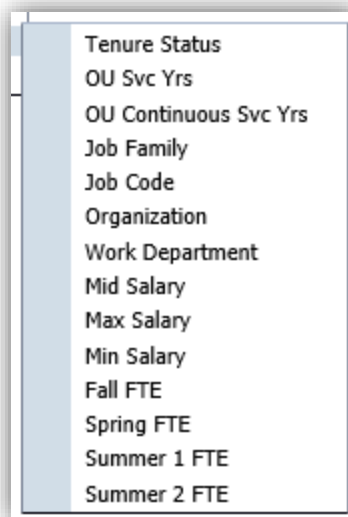
Prompt	Definition
<b>Planning Unit</b>	Click the checkbox to select one or more planning units.
<b>HR Organization</b>	HR Organization is the organization to which an employee is associated within their (UHR) employee record. Click the checkbox to select one or more organizations.
<b>Org Campus</b>	Click the checkbox to select one or more campuses.
<b>Location</b>	Click the checkbox to select one or more locations.
<b>Job Category</b>	Click the checkbox to select one or more of the following: Administration, Classified, Faculty, or Research.

Effective Date: 6/26/2017

<b>Job Code</b>	Click the checkbox to select one or more job codes.
<b>Benefit Program Level</b>	Click the checkbox to select one or more benefit program levels.
<b>Benefit Program</b>	Click the checkbox to select one or more of the following: AFSCME, Admin Hourly, Class NBU, Executive, FOP, Faculty, or Other Appointment.
<b>Employee Number</b>	If you would like to search for a specific employee, enter the employee's number (6 digits).
<b>Last Name</b>	If you would like to search for a specific employee, enter the employee's last name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case. Example: enter <b>Bobcat</b> .
<b>First Name</b>	If you would like to search for a specific employee, enter the employee's first name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case. Example: enter <b>Rufus</b> .
<b>Supervisor</b>	If you would like to search for employees who report to a specific person, enter the supervisor's last name. This field is case sensitive. The first letter needs to be capitalized, the remaining letters need to be lower-case.
Click <b>Apply</b> .	

### View or Export Data

You may view the data directly within OBI, or you may export the data for further manipulation, formatting, and analysis. If you choose to export the data to CSV, the following extra columns will display. See [Export Data](#).



## Payroll Detail

Formerly “Payroll Expense Distribution System (PEDS)”

Use Payroll Detail:

- For financial forecasting
- To verify payroll accuracy
- To view payroll transfer details (buyout charged to a grant)

**NOTE:** You may be used to accessing your reports by clicking *Catalog*. Now, instead click **Dashboards** (top right corner).

1. Click **Dashboards**. In the drop-down menu, under *Finance and Administration Dashboards*, click **Human Resources**.
2. Click the **Payroll Detail** tab.

## Prompts

Prompt	Definition
<b>*Fiscal Year</b>	* Indicates this is a required field. <b>NOTE:</b> In addition to <i>Fiscal Year</i> , you should select at least one (1) additional prompt. <b>WARNING:</b> If you only prompt by <i>Fiscal Year</i> and <i>Fiscal Period Name</i> , OBI will time out. It is recommended that you also prompt by <i>Planning Unit</i> and <i>GL Organization</i> .
<b>Fiscal Period Name</b>	Describes the period (JAN 2017-17). This will limit your <i>Fiscal Period Names</i> based on the (prompted) <i>Fiscal Year</i> . <b>WARNING:</b>

Effective Date: 6/26/2017

	If you only prompt by <i>Fiscal Year</i> and <i>Fiscal Period Name</i> , OBI will time out. It is recommended that you also prompt by <i>Planning Unit</i> and <i>GL Organization</i> .
<b>Check Date</b>	Click the calendar icon to select the desired date and time. Click <b>OK</b> .
<b>Element</b>	Elements represent the compensation and benefit types applied to employees. In a payroll environment these are also the earnings and deductions that contribute to the overall pay of an employee. Typical examples include regular salary and wages, bonus payments, health insurance enrollment, tax and insurance payments, stock purchase plans and pension contributions.  Click the checkbox to select one or more elements.
<b>Employee Number</b>	If you would like to search for a specific employee, enter the employee's number (6 digits).
<b>Last Name (Case Sensitive)</b>	If you would like to search for a specific employee, enter the employee's last name. This field is case sensitive. Example: enter <b>Bobcat</b> .
<b>First Name (Case Sensitive)</b>	If you would like to search for a specific employee, enter the employee's first name. This field is case sensitive. Example: enter <b>Rufus</b> .
<b>Planning Unit</b>	Click the checkbox to select one or more planning units.
<b>Job Category</b>	Click the checkbox to select one or more of the following: Administration, Classified, Faculty, or Research.
<b>Fund Type</b>	This prompt will change to reflect the new chart of accounts.
<b>Fund</b>	This prompt will change to reflect the new chart of accounts.
<b>GL Organization</b>	GL Organization is the organization to which an employee's payroll is costed.  Click the checkbox to select one or more General Ledger (GL) organizations.
<b>Natural Account</b>	This prompt will change to reflect the new chart of accounts.
<b>Project</b>	This prompt will change to reflect the new chart of accounts.
<b>Task</b>	This prompt will change to reflect the new chart of accounts.
Click <b>Apply</b> .	

## View or Export Data

You may view the data directly within OBI, or you may export the data for further manipulation, formatting, and analysis. See [Export Data](#).

## Reports

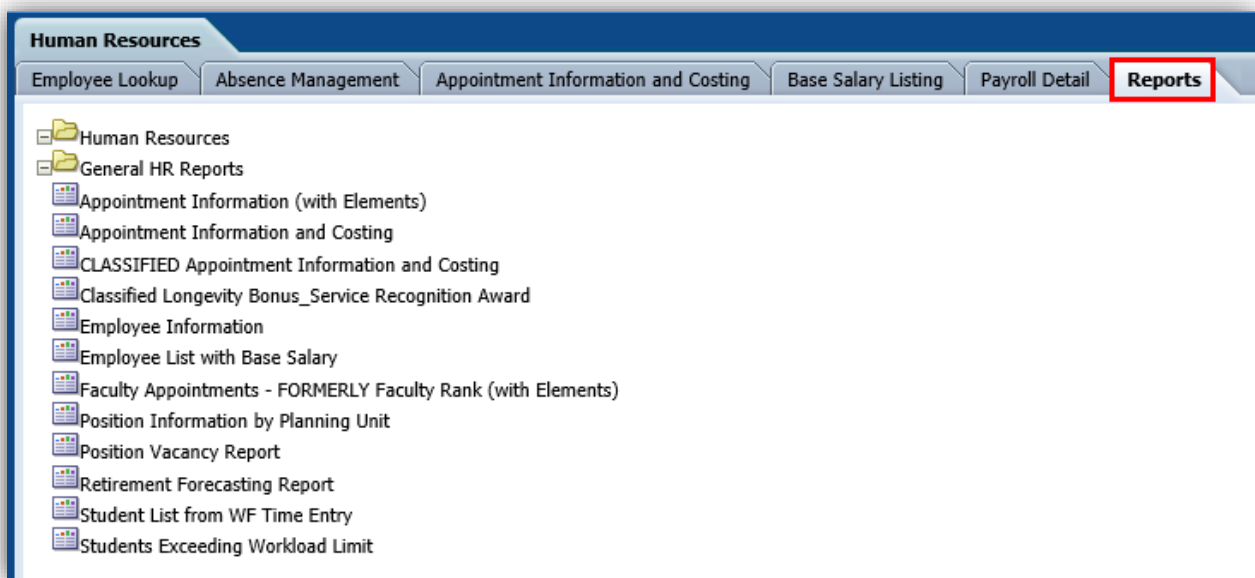
The Reports tab contains additional predefined queries for ad hoc reports requested by units. These are the reports that users have access to in the .Published > Human Resources > General HR reports. The Reports tab is also an easy way for users to navigate without using the *Catalog*.

Use the Reports tab to:

- Access information not available in the dashboards

**NOTE:** You may be accustomed to accessing your reports by clicking *Catalog*. Now, instead click **Dashboards** (top right corner).

1. Click **Dashboards**, in the drop-down menu, under *Finance and Administration Dashboards*, click **Human Resources**.
2. Click the **Reports** tab.



## OBI ADVANCED ACCESS

If you require advanced OBI access, your Planning Unit's CFAO should send an email request to the appropriate HR/Payroll representative on the Financial Administrative Systems Team (FAST). In the request, please include the full proper name and OHIO ID for the employee for which you are requesting access. Be sure to specify which dashboard/report/data the employee should be given access permissions to.

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**IF YOU REQUIRE OBI ACCESS TO ADDITIONAL DATA, YOUR PLANNING UNIT'S CFAO  
MUST CONTACT THE APPROPRIATE FAST MEMBER TO REQUEST ACCESS.**

<HTTPS://WWW.OHIO.EDU/OIT/OBI/ACCESS-REQUEST.CFM>

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