



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 exported in a variety of formats for analysis.

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**.

OHIO ID or Username:
Enter your OHIO ID

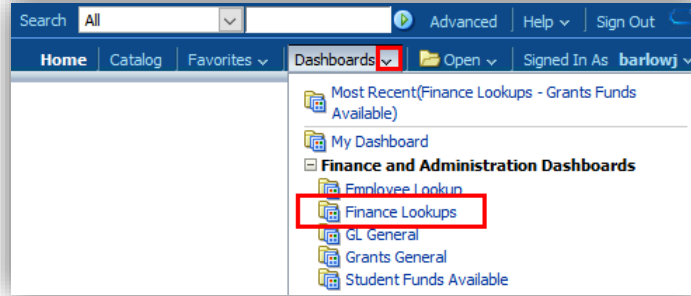
Password:
••••••••

LOGIN CLEAR

[[Forgot your password?](#)]

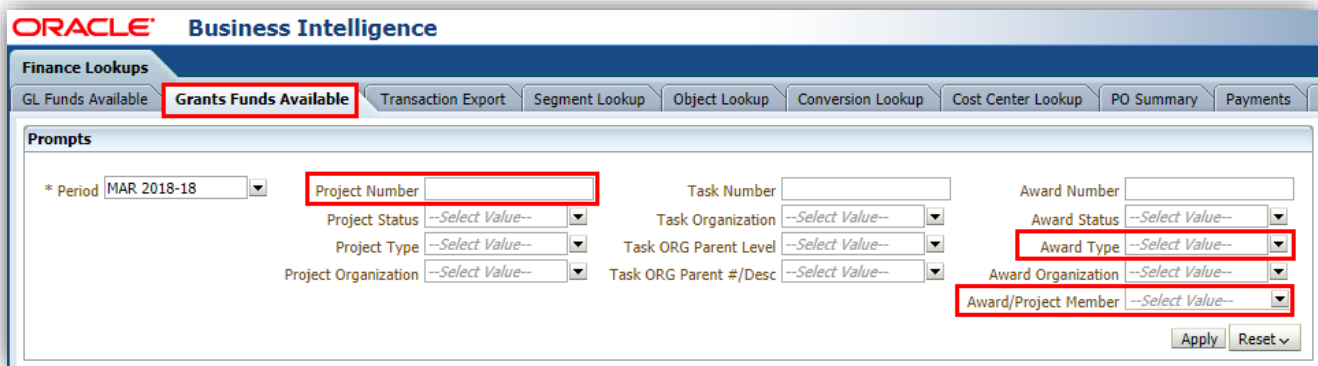
For help, please call (740) 593-1222 or visit the [IT Service Desk](#).

3. Complete your **Multi-factor Authentication**. Multi-factor authentication turns your OHIO login into a two-step process to better protect your account. **WARNING:** If you have not yet setup multi-factor authentication, visit: <https://www.ohio.edu/oit/multi-factor/index.cfm>
4. Click **Dashboards** (top right). In the drop-down menu, under *Finance and Administration Dashboards*, click **Finance Lookups**.



Your Finance Lookups 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.

5. Click the Grants Funds Available dashboard page.



Grants Funds Available Dashboard Page

The Grants Funds Available dashboard page details the totals by Project-Task-Award (PTA) combination with drilldowns to Project, Task, and Award summaries with additional drilldowns by Expenditure Category to transaction detail.

- Multiple prompt combination options are available
- *Period is a required prompt
- Drilldown by Project, Task, or Award for details

Use Grants Funds Available:

- For a "snapshot" of funds available by PTA for the individual/department
- For PTA Start Date and PTA End Date to identify the valid expenditure item dates for that PTA
- To see if the PTA is currently chargeable
- To drilldown by Project, Task, or Award
- To drilldown by Expenditure Category to expense transaction

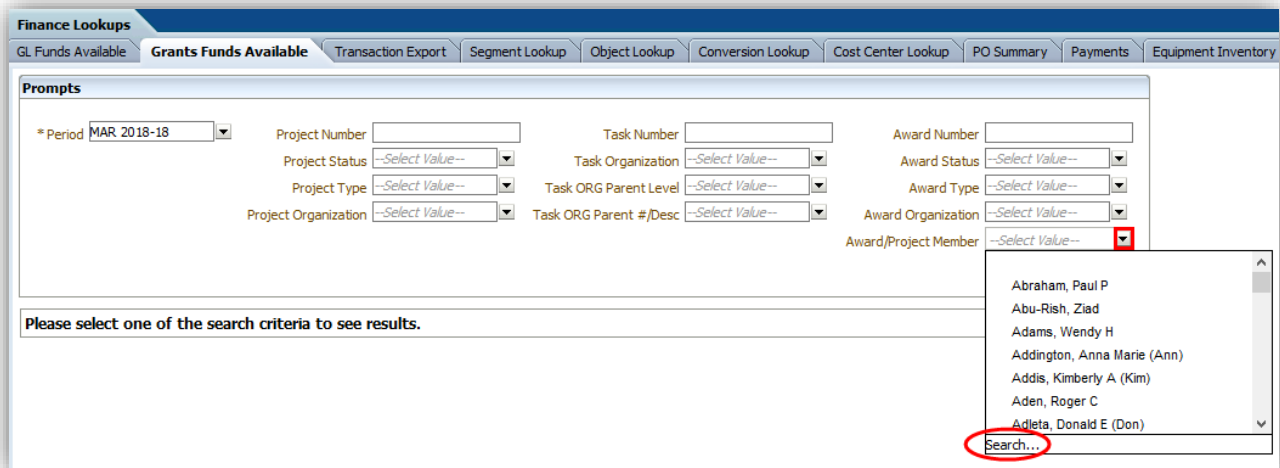


Prompts	Definition
*Period	* (Asterisk) indicates this is a required field
Project Number	Five-digit value that represents the faculty member, department, or scope of work
Project Status	The status of the project (Unapproved, Approved, or Closed)
Project Type	The type of project (Sponsored, Internal, or Capital)
Project Organization	The organization that owns and manages the project
Task Number	Up to five-character value, which provides a way of organizing expenditures
Task Organization	Task Organization is used to summarize accounting information to the Organization segment in the General Ledger
Task ORG Parent Level	Parent hierarchy level for Task Organization
Task ORG Parent #/Desc	Values or description for Task Organization based on parent hierarchy level
Award Number	Seven-digit value that represents the source of funding that supports one or more Projects. All Internal Awards are funded internally (within the University or Foundation)
Award Status	The status of the Award (Active or Closed)
Award Type	Award Type is the source of funding for that award and is summarized to the Source segment in the General Ledger
Award Organization	The organization to which the award is assigned
Award/Project Member	Person assigned to any role for the project or Award

Prompt by Project Number or Award/Project Member

Prompts allow you to query specific data in order to narrow your data results. If you query the same data regularly, you can save your custom prompt for future use. If you choose to save your custom prompt, please note that it is associated with the dashboard page (Grants Funds Available) that is currently selected.

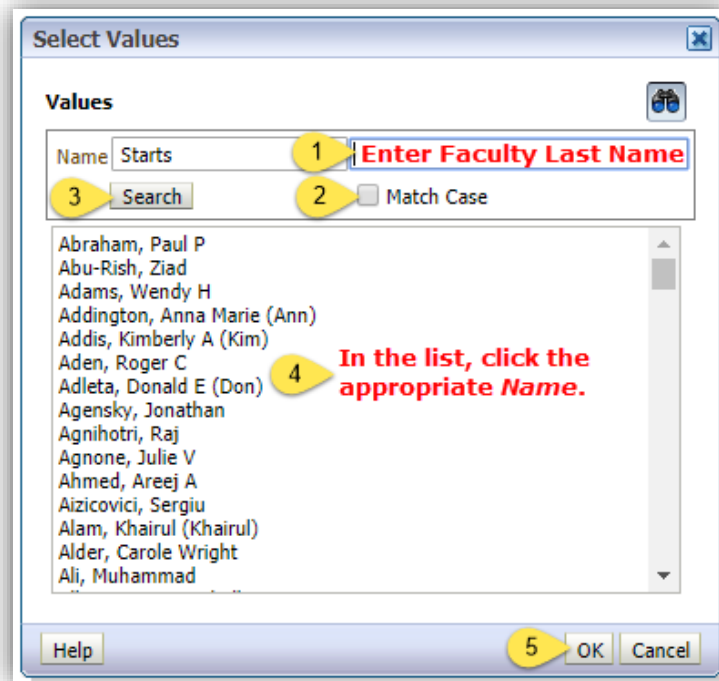
1. Login to OBI and navigate to the **Finance Lookups** Dashboard.
2. On the **Grants Funds Available** dashboard page, ***Period is a required field!** Select the desired period(s).
3. To prompt by *Award/Project Member*, click the **down arrow** and click **Search**.



4. Enter the faculty member's **Last Name**.
5. **Deselect** the *Match Case* **checkbox** and click **Search**.

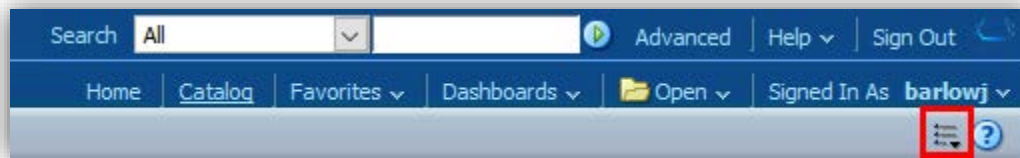


6. In the list that displays, click the **Name** of the appropriate person and click **OK**.

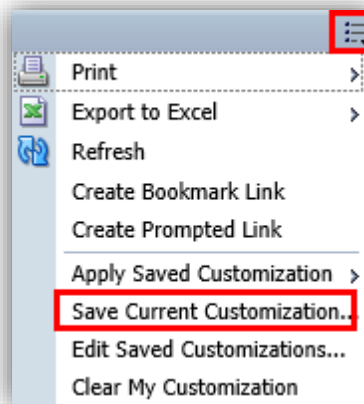


7. After specifying your prompts, click **Apply**. The projects associated with this person will display.

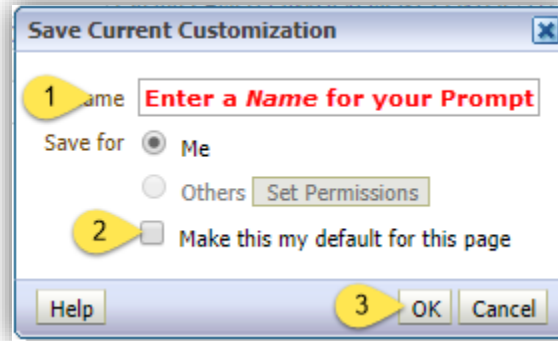
8. If you will view this information frequently, you may save your custom prompt for future use. To save your custom prompt, click **Page Options** (top right).



9. Click **Save Current Customization**.



10. Enter a **Name** for your custom prompt. If you want your customized prompt to be the default for the current dashboard page (Grants Funds Available), click the *optional checkbox* next to *Make this my default for this page*.

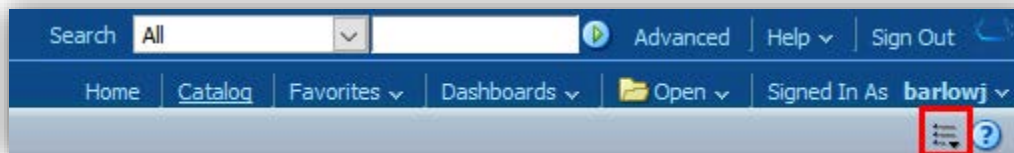


If you click this checkbox, each time you access the **Grants Funds Available** dashboard page, your saved customization will automatically display.

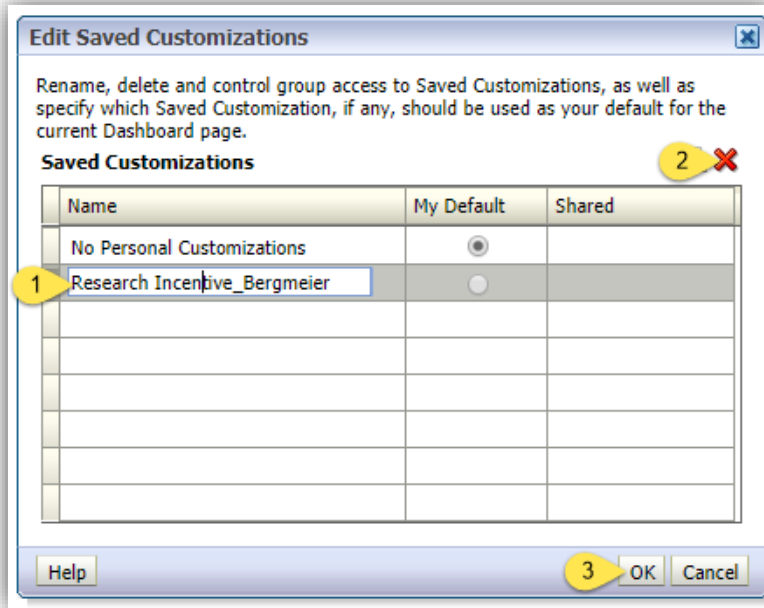
11. Click **OK**.

WARNING: *PERIOD IS A REQUIRED FIELD. WHEN YOU SAVE THE CURRENT CUSTOMIZATION, THE PERIOD WILL ALSO SAVE. IN THE FUTURE, THE PERIOD WILL NEED TO BE CHANGED. YOU MAY UPDATE THE PERIOD, CLICK APPLY, AND RESAVE THE CUSTOMIZATION TO INCLUDE THE CURRENT PERIOD.

1. If you chose not to make your customization the default for this page, to apply your custom prompt, click **Page Options** (top right).



2. Trace to **Apply Saved Customization** and select the desired saved customization. Your saved customization will display. From here, you may specify additional prompts (update the ***Period**, etc.) and click **Apply**.
3. To delete a saved customization, click **Page Options** (top right). Click **Edit Saved Customizations**. Under the *Name* column, click the customization to be deleted. Click the red X and click **OK**.



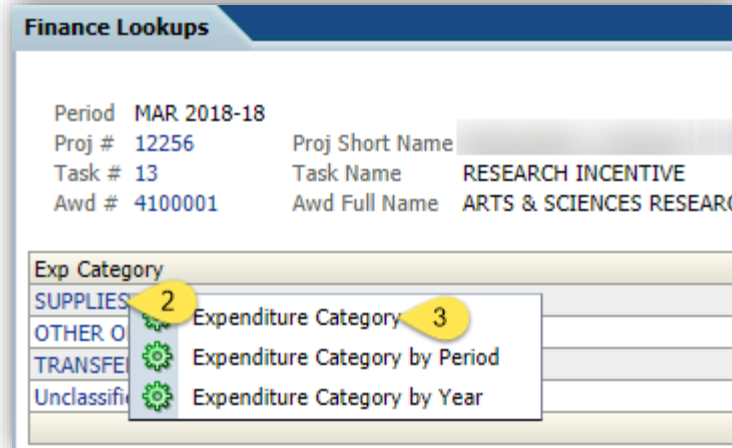
Drilldown Options

Drilling-down involves clicking on data at the summary level to reveal detailed information. In Grants Funds Available, you may drilldown by *Project #*, *Task #*, *Award #*, and *Expenditure Category* to see details. To drill-down, click the desired **link**. The details will display.

1. To drilldown by *Project #*, click the appropriate **Project Number**.

Proj #	Proj Short Name	Task #	Task Name	Awd #
12256		13	RESEARCH INCENTIVE	4100001
12425		13	RESEARCH INCENTIVE	4100001
12489		13	RESEARCH INCENTIVE	4100001

2. When the project's *Expenditure Categories* display, click to select the desired **Expenditure Category** (Supplies, Other Operating Costs, Transfers, etc.).



3. From the list of options, click **Expenditure Category**. The details will display.

Breadcrumbs

WARNING: IN OBI, DO NOT USE YOUR BROWSER'S BACK BUTTON TO NAVIGATE TO THE PREVIOUS SCREEN. INSTEAD, USE BREADCRUMBS.

When you drilldown in a dashboard, you may use the breadcrumbs to navigate back to the summary level. To navigate back to the summary level, click the desired **Summary Level** in the breadcrumbs trail at the bottom (left) of the screen. The breadcrumbs trail is associated with the dashboard page (Grants Funds Available) that is currently selected as well as the current drilldown.

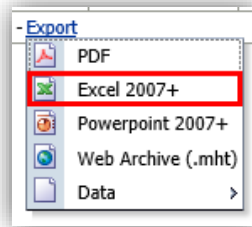
[Finance Lookups: Grants Funds Available](#) > [Funds Available by Expenditure Category](#) > [Expenditures by Category](#)

In the example above, to navigate back to the summary level, click **Finance Lookups: Grants Funds Available** in the breadcrumbs trail at the bottom of the screen.

Export to Microsoft Excel

If you export to Microsoft Excel, it will maintain the OBI formatting that you see on your screen.

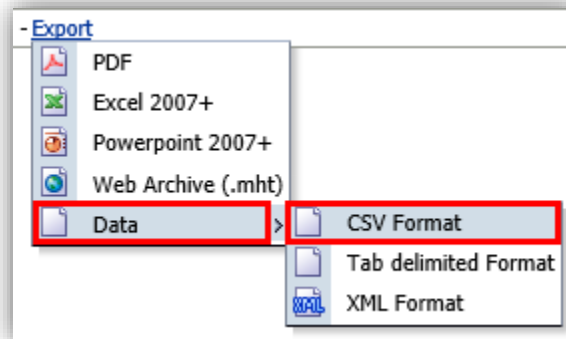
1. To export the data to Microsoft Excel, scroll to the bottom of the data and click **Export**. Then click **Excel 2007+**.



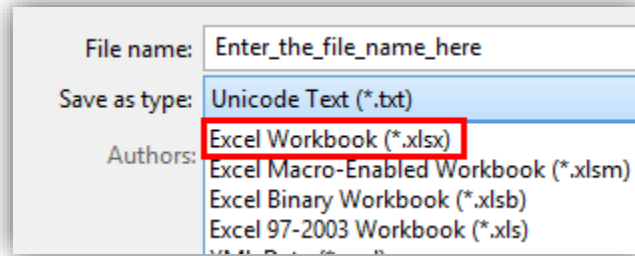
2. Click **OK**.
3. Upon confirmation, click **Open** to open the Microsoft Excel spreadsheet. Modify or save the worksheet as desired.

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**.
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 resave 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**.



WARNING: BY DEFAULT, A CSV FILE WILL SAVE AS TEXT ONLY. AS A RESULT, TO SAVE YOUR FORMATTING, YOU MUST RESAVE THE CSV FILE AS A MICROSOFT EXCEL WORKBOOK.
