OBI Finance & HR Dashboards:
OBI General Functionality

Overview

OHIO Bobcat Insights (OBI) is a web-based reporting tool used to support the campus community's academic and administrative offices. The purpose of this document is to show you how to login to OBI and navigate to the **Finance and Human Resources dashboards**. It also contains general tips to help you use OBI more effectively, such as setting user preferences, customizing your dashboards, using drilldowns, exporting data, and searching for reports.

Quick Reference Guide Contents:

NOTE: Financial and Human Resource data in OBI is refreshed at 1:00 a.m. each day.

Navigate & Login to OBI

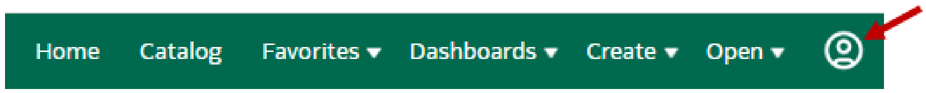
To login to OBI using Mozilla Firefox, Google Chrome, or Microsoft EDGE:

1. Visit http://www.ohio.edu/finance
2. Click the OBI Icon 

3. Enter your **OHIO ID** and **Password**

User Preferences

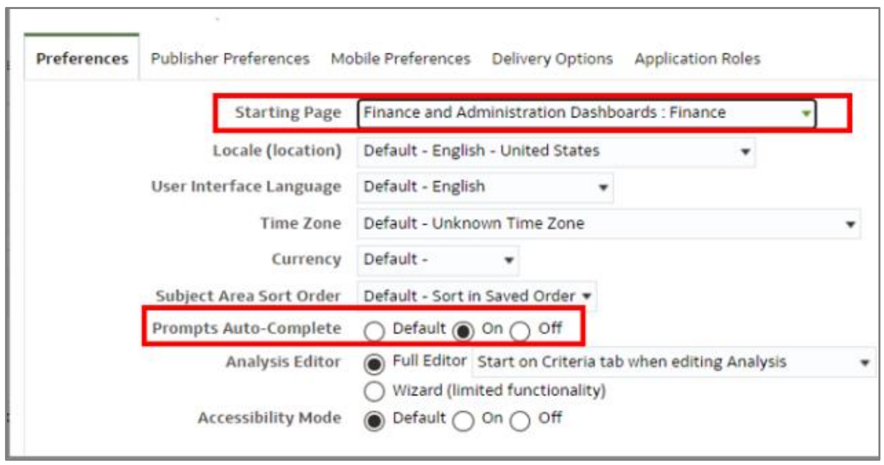
In the **My Profile** page in OBI, users can define their personal preferences.



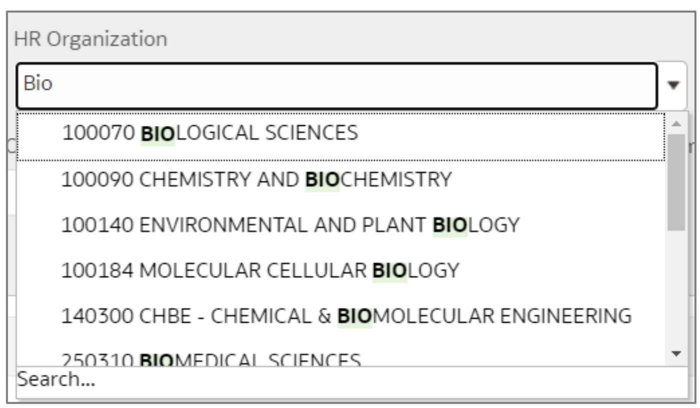
The following are common user preference changes:

Starting Page: Users can define their starting page for OBI. If you frequently use the HR or Finance dashboards, consider setting one of these as your homepage to save you a few clicks the next time you log into OBI.

Prompts Auto-Complete: With this enhanced feature, users are able to limit the prompt dropdown menus to include only options that contain specific keywords/values as you are typing.



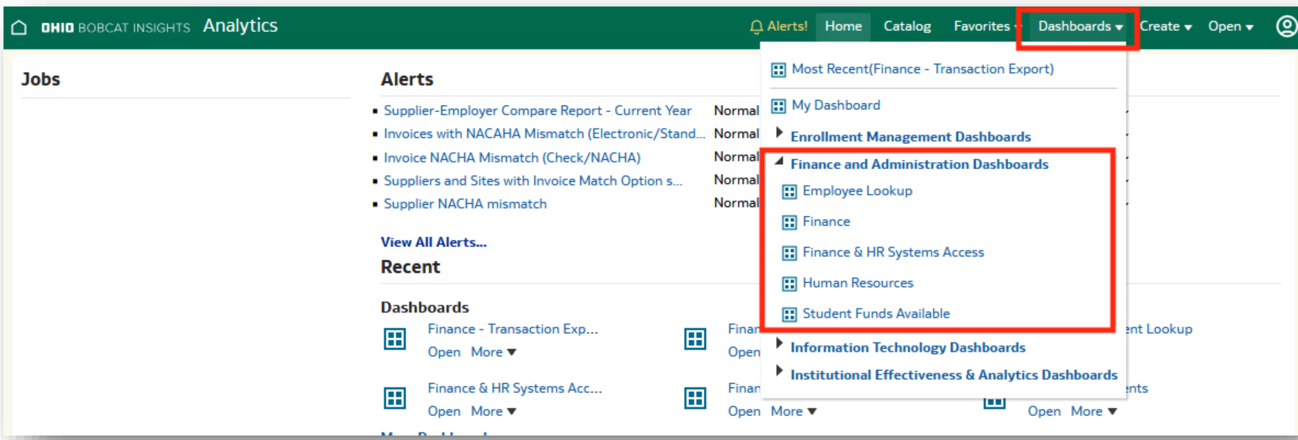
- For example, if you enter "Bio" into an org description prompt, the dropdown list will only show you orgs that contain the letters "bio":



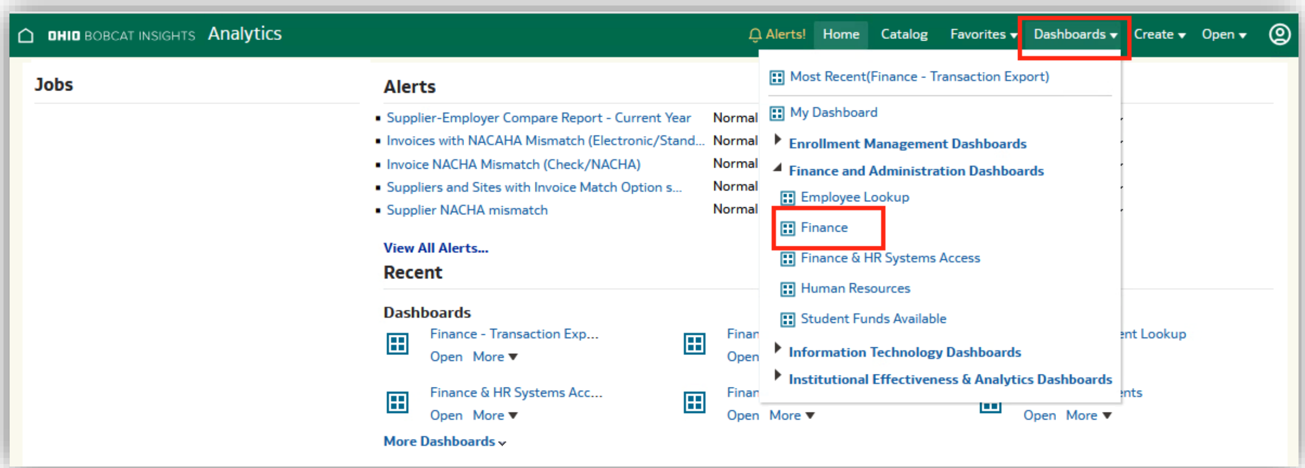
- To enable this setting, select the **ON** radio button on the Prompts Auto-Complete row.

Navigate to Dashboards

Once you have logged into OBI, click the **Dashboards** arrow in the top right corner to see the list of dashboards you have access to.



Select the name of Dashboard from the drop-down list.



Dashboards

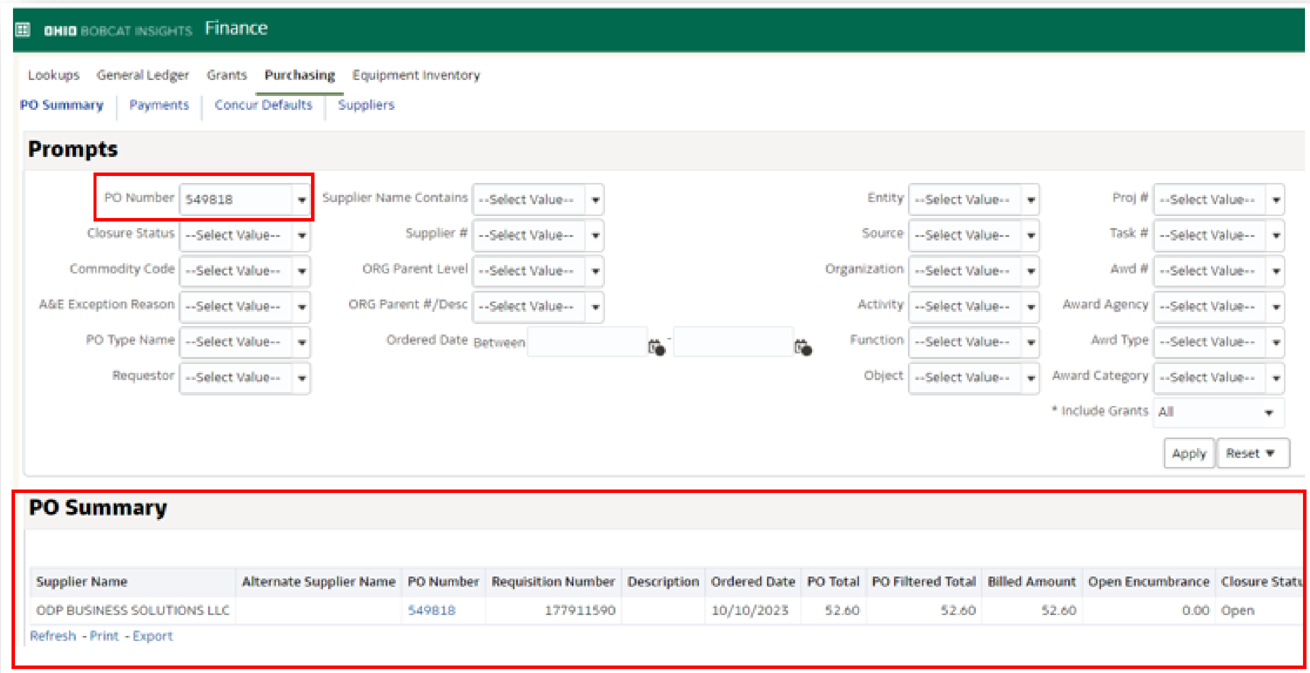
Dashboards are dynamic. Each Dashboard includes dashboard pages or tabs that can be used to access different data.

- Each dashboard has prompts at the top of the page.
- Data results are displayed at the bottom of the page.

Dashboards provide:

- Ability to save a customization
- Drilldown: blue text indicates that you can drilldown for further detail
- Breadcrumbs: allow navigation to the previous screens
- Export reports and transactional data in a variety of formats: Microsoft Excel, CSV, Word, or PDF

In the example below, the **PO Summary** dashboard is prompted for PO # 549818. The PO Summary results are displayed at the bottom of the page.



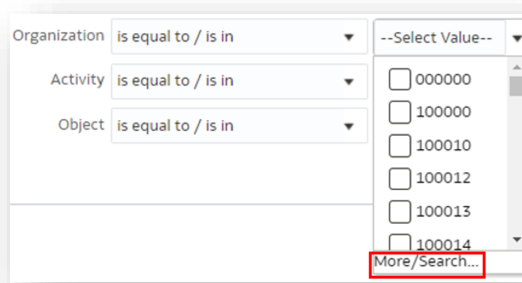
Prompts

The finance and HR dashboards contain several types of prompts. Some prompts are free-form text, some are drop-down menus that allow only one selection from the list of values, and some are drop-down menus that allow multiple selections.

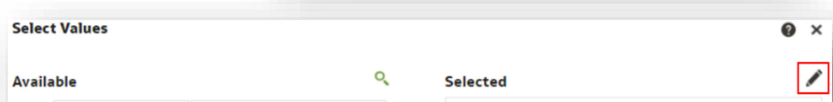
Paste Values into a Prompt

A list of values can be pasted into any prompt that allows multiple selections.

1. Click the drop-down arrow next to the prompt and then select **More/Search**



2. Select the **pencil edit icon**



3. Paste your list of values, then press **OK** on the next two screens.

Important – When you paste your list of values, be careful not to include an empty character return on the last row. Backspace until you see your cursor on the last row (as shown in the screenshot to the right).

Save a Customization for Frequently Used Prompts & Columns

Prompts allow you to query specific data to narrow your data results. If you query and/or view the same data regularly, you can save a custom set of prompts and data columns for future use.

A customization:

- is only associated with the currently selected dashboard page
- includes <u>both</u> the prompts you populated and the columns you arranged when you saved it
- can be set as the default so it will automatically display each time you access the dashboard page
  NOTE: you can create multiple customizations for a single dashboard page but only set one as the default at a time

Create Customized Prompts

Prompts allow you to query specific data to narrow your results.

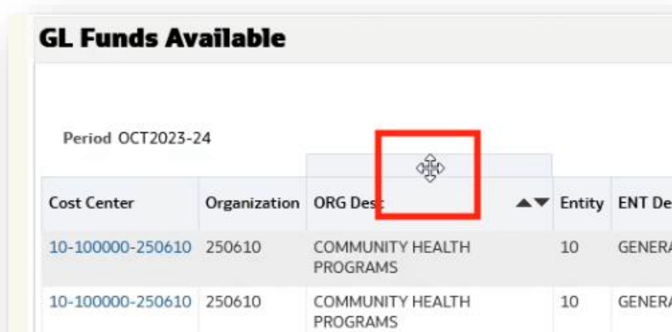
1. Navigate to the desired Dashboard Page
2. *(asterisk) indicates a required field. Select the desired **Prompts** and click **Apply**
3. If you also want to customize the columns, proceed to the **Create Customized Columns** section below; otherwise, skip to the **Save Customization** section below.

Create Customized Columns

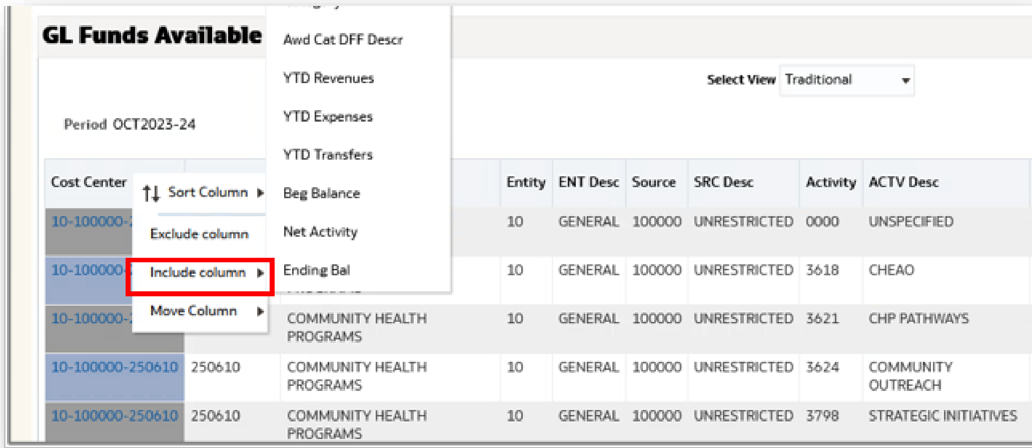
You can choose to display additional columns, sort column results, exclude columns, and/or arrange columns in a different order.

Insert a Column

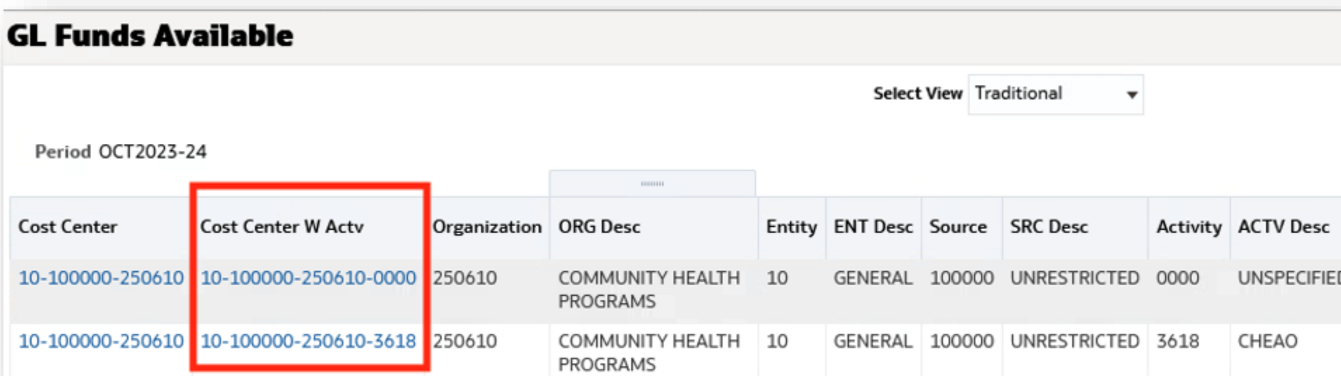
1. In the data section, choose the column you want to place the new column after, and hover above the header name of that column to **put your cursor in Move mode** (an icon with 4 arrows):



2. Right click, select **Include column**, and click the name of the column you want to add:



In the example above, the column **Cost Center W Actv** was added after the Cost Center column:



Exclude Columns

If you would like to remove a column from your report, right click on the column header and click **Exclude Column**. This will remove the column from the OBI on-screen view as well as the formatted export version of the report. Reports that are exported using a **Data** option will include all columns, even those that you may have excluded.

Sort Columns

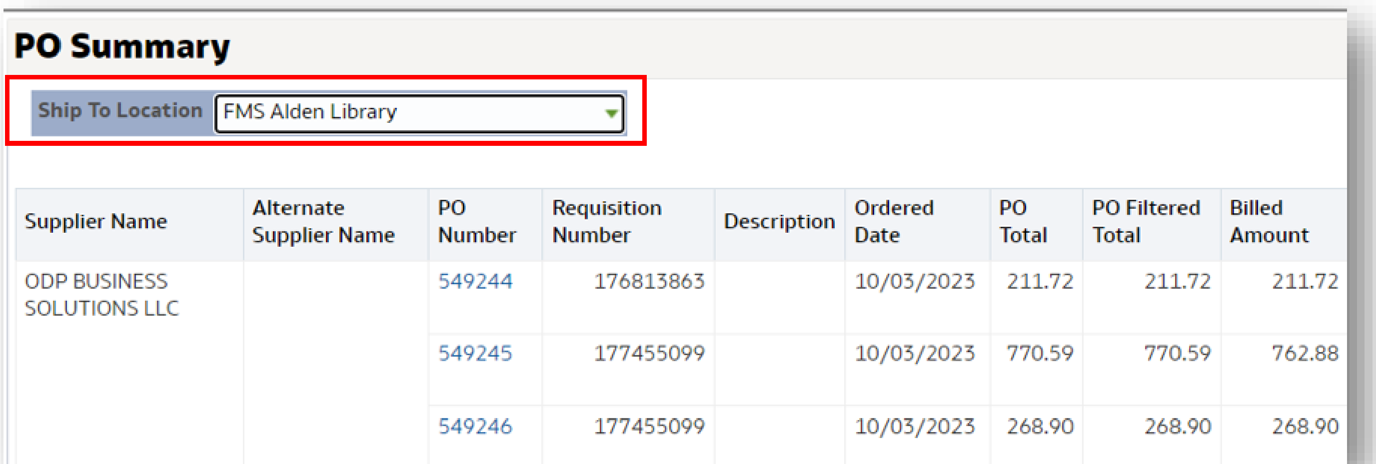
Some columns within a dashboard allow you to change the sort order. Right click on the column and select Sort Column, then select the sort option that you would like to apply.

- **Sort Ascending and Sort Descending** options: If you only need to apply one sort, or if this is the first sort that you would like to apply on a dashboard, select one of these options.
  - Note – you may also apply a primary sort directly on the column header by clicking the up or down arrow on the column title.
- **Add Ascending Sort and Add Descending Sort** options: If you would like to apply a secondary sort, select one of these options. (You may add as many additional sorts that you may need.)

Move Columns

Some dashboards also allow you to move columns so that you can view the data columns in a different order, with additional prompts, or in a sectioned report. Right click on the column header to expose these move options. You may also drag and drop to move these columns.

- **Move Column Left or Right:** This changes the column order that is displayed on the screen and in the formatted export files.
    - Please note that moving columns around within a dashboard can also change the sort order that is applied to the dashboard. For example, if a column is moved to the first column, many dashboards will automatically sort that first column in ascending order.
- **Move Column to Prompts**: If you would like to further limit the data on your report by applying additional prompts, try moving column(s) to prompts. For example, let's say that you're analyzing the list of organization codes in the segment lookup dashboard, but you would like to filter by Org Level C to view one planning unit at a time. When you select to move a column to prompts, it will add a dropdown menu directly above the results for that current login session.
  For example, in the screenshot below, the Ship to Location was originally a column in the results. After moving the Ship to Location to a prompt, it now shows a drop-down menu above the results that allows you to easily filter to view only one Ship to Location at a time.


PO Summary

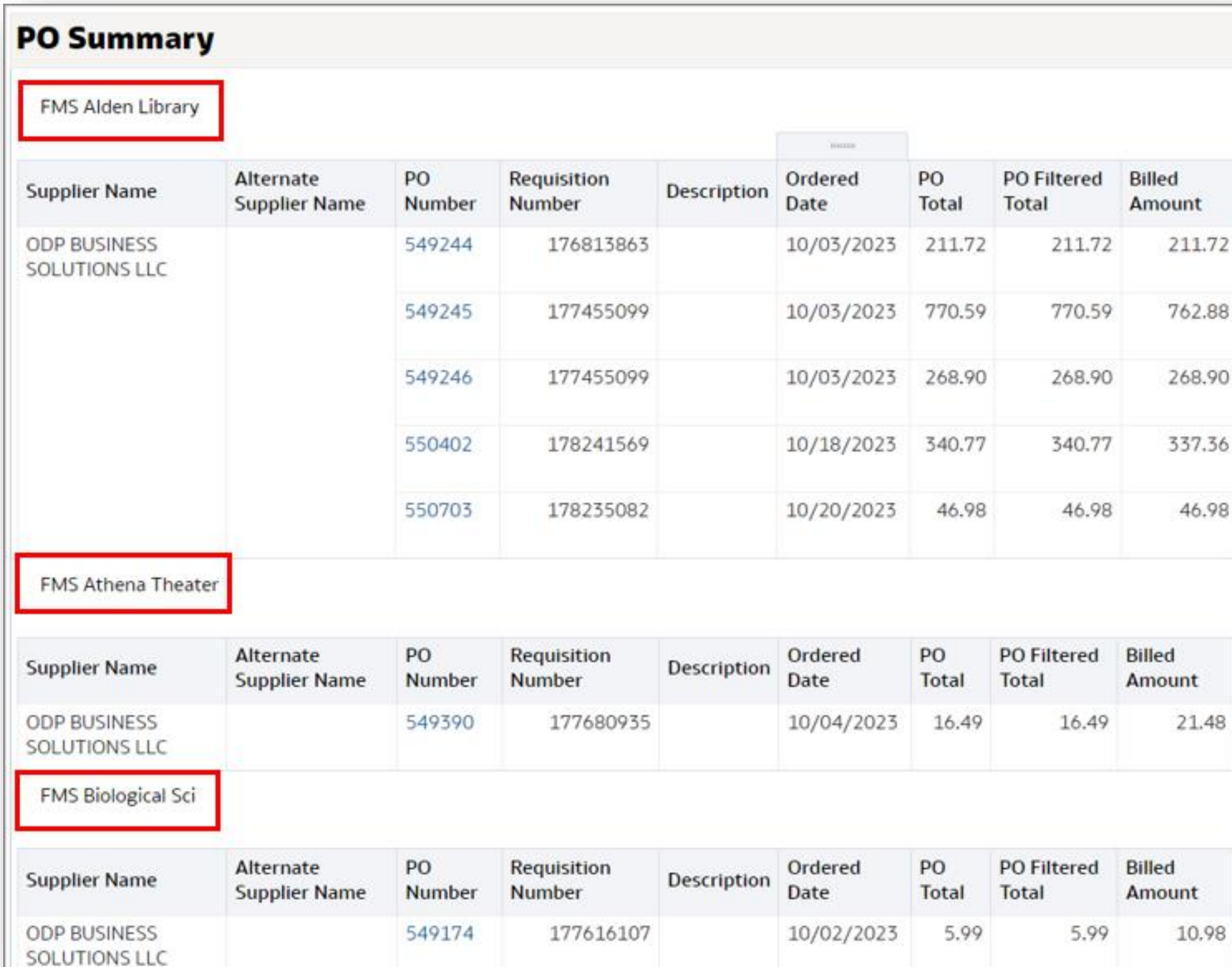
Ship To Location: FMS Alden Library

Supplier Name	Alternate Supplier Name	PO Number	Requisition Number	Description	Ordered Date	PO Total	PO Filtered Total	Billed Amount
ODP BUSINESS SOLUTIONS LLC		549244	176813863		10/03/2023	211.72	211.72	211.72
		549245	177455099		10/03/2023	770.59	770.59	762.88
		549246	177455099		10/03/2023	268.90	268.90	268.90

  Multiple columns can be moved to prompts.

  If you would like to move the prompt back to a column, drag it back down into the results section of the page, or right click on the prompt and select **Move Column** > **To Columns**.

- **Move column to section**: If you select this option, the column will be used to create a separate sectioned report for each value in that column. In the example below, the Ship To Location was used to create sectioned reports for each location.



PO Summary

FMS Alden Library

Supplier Name	Alternate Supplier Name	PO Number	Requisition Number	Description	Ordered Date	PO Total	PO Filtered Total	Billed Amount
ODP BUSINESS SOLUTIONS LLC		549244	176813863		10/03/2023	211.72	211.72	211.72
		549245	177455099		10/03/2023	770.59	770.59	762.88
		549246	177455099		10/03/2023	268.90	268.90	268.90
		550402	178241569		10/18/2023	340.77	340.77	337.36
		550703	178235082		10/20/2023	46.98	46.98	46.98

FMS Athena Theater

Supplier Name	Alternate Supplier Name	PO Number	Requisition Number	Description	Ordered Date	PO Total	PO Filtered Total	Billed Amount
ODP BUSINESS SOLUTIONS LLC		549390	177680935		10/04/2023	16.49	16.49	21.48

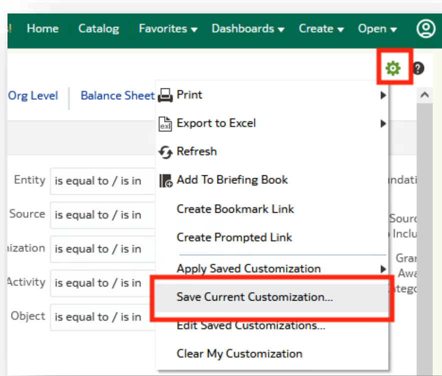
FMS Biological Sci

Supplier Name	Alternate Supplier Name	PO Number	Requisition Number	Description	Ordered Date	PO Total	PO Filtered Total	Billed Amount
ODP BUSINESS SOLUTIONS LLC		549174	177616107		10/02/2023	5.99	5.99	10.98

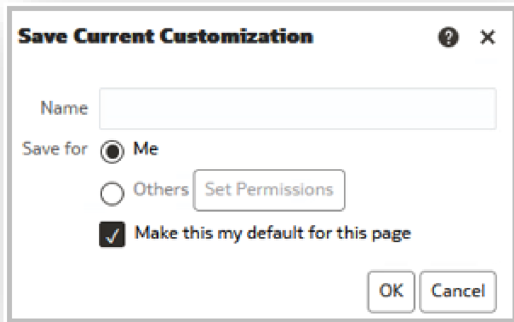
Save Customization

REMINDER: The saved customization will include both the prompts and the displayed columns.

1. Click **Page Options** ⚙ then select **Save Current Customization**



2. Enter a **Name** for your customization. If you want your customization to be the default for the current dashboard page, click the optional **checkbox** next to *Make this my default for this page.*



3. Click **OK**

In this same settings menu, you can also edit or delete a customization that you've saved.

Apply a Saved Customization

Once you have saved a customization, you can apply that customization to your dashboard, by completing the following steps:

- Open the Settings (gear icon) menu (see screenshot in step #1 above)
- select **Apply Saved Customization**
- Select the name of the customization that you would like to apply

Drilldown to View Further Detail

Drilling-down involves clicking on data at the summary level to reveal detailed information. To drill-down, click the desired **hyperlink** (blue text). The details will display.

Breadcrumbs to Navigate to Previous Screens

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. 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 that is currently selected as well as the selected drilldown.

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

Export Options

Users may choose to export the underlying data or the formatted results to a variety of different file types. If you need to analyze or work with the data in Excel, the **Data Export to Excel** option is recommended.

If your data has merged cells and totals, we do **not** recommend using the Formatted Export to Excel unless you're simply planning to print it. The formatted data cannot easily be sorted, filtered, or pivoted. See chart below for additional information about data Excel export vs. formatted Excel export.

Data vs. Formatted Excel Export Options

<table>
<tr><th>Data Excel Export</th><th>Formatted Excel Export</th></tr>
<tr><td>

- Exports the underlying raw data.
- Contains all data used in the report, regardless of whether it is exposed on your screen in OBI.
- Does not format the data as shown in OBI. Does not contain merged cells or totals; therefore, allowing you to insert your own pivot tables, sort, filter, etc.
- Preferred export option for large file extracts.

</td><td>

- Exports reports exactly as they are shown on the screen in OBI.
- If a column is not exposed on the screen, then it will not show in the export.
- May contain merged cells and totals that make it difficult to insert pivot tables, sort, filter, etc.
- Not recommended for large file extracts; it may error.

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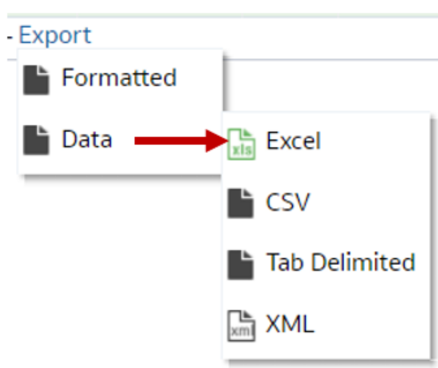

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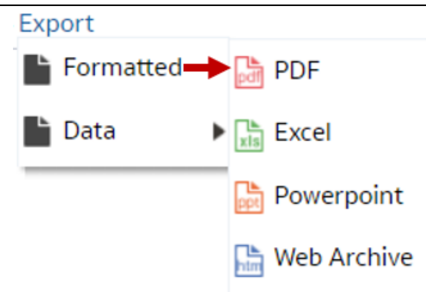

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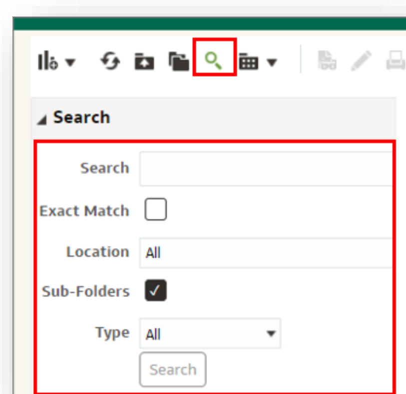
Searching in OBI

OBI provides a search tool that allows you to search for a report. Follow the instructions below to search for a report in OBI:



1. Click the **Catalog button** in the top right menu.
2. Click the **spyglass / magnifying glass / search icon**
3. In the left pane, type your search term in the **Search** box, then **select the Search** button.
4. Additional search options to help filter the results include:

   - **Exact Match**
   - **Location:** Limit the search to My **Folders**, **Shared Folders**, or **All**
   - **Sub-folders**: Limit the top-level folder, or search the sub-folders contained within the top-level folder. Note: Searching sub-folders will take longer.
   - **Type:** Limit the search to **Dashboard** or **Analysis** (to search in your reports catalog) or select **All**

Additional OBI Resources

Additional information about OBI can be found on the following OHIO websites:

- OBI systems overview page on the finance website:
  https://www.ohio.edu/finance/systems/overview

- Quick reference guides for specific Finance and HR dashboards can be found on the finance quick reference guides page:
  https://www.ohio.edu/finance/quick-reference-guides

- Knowledge base on the OIT help website:
  https://help.ohio.edu/TDClient/30/Portal/KB/?CategoryID=216