

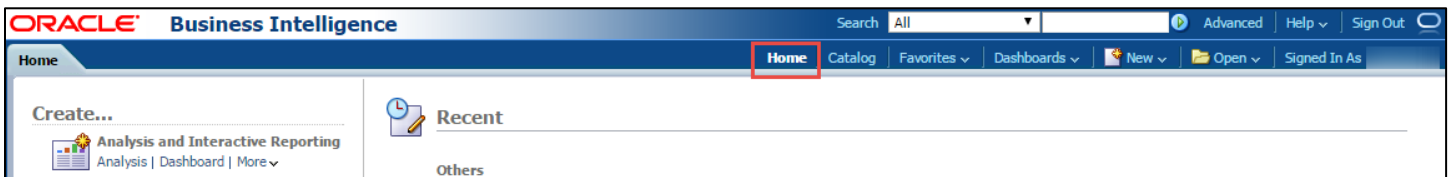
Overview

This document outlines general instructions for using Ohio University's Oracle Business Intelligence (OBI) system for the Finance Fixed Assets Dashboard page. OBI is a web-based reporting system used to support the campus community's academic and administrative offices. The Fixed Assets Dashboard provides the ability to display asset(s) by Asset Name, Date in Service, Cost, Department, Building, Room, Tag Number, Serial Number, PO Number, etc.

A prompt page is provided to allow filtering of individual or groups of assets based on Organization Number (Department Number), Organization (Department) and many others.

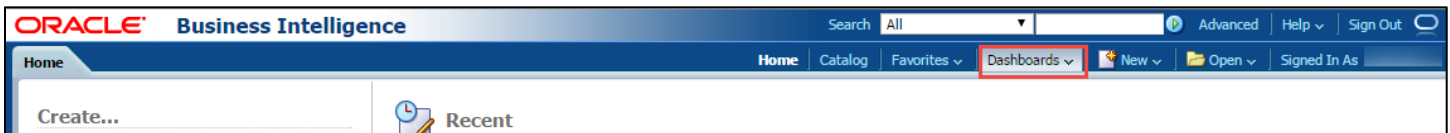
OBI Login –

1. Login to OBI using: <https://obiprd.oit.ohio.edu/> with OHIO ID and password.
2. Upon login, landing page should be Home – if not, click Home in Navigation Pane (top right).

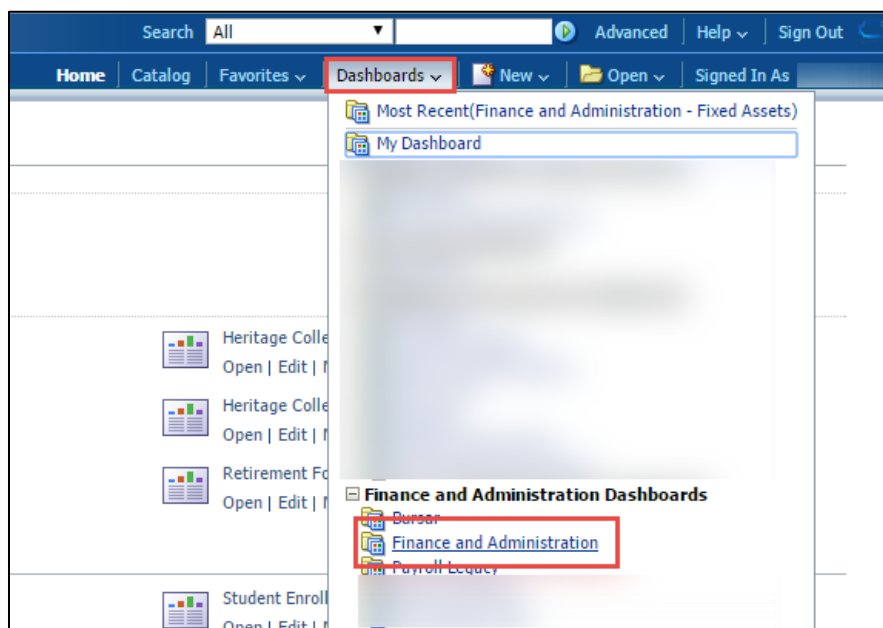


Fixed Assets Dashboard Page Navigation –

1. Click **Dashboards** to display the list of available dashboards.

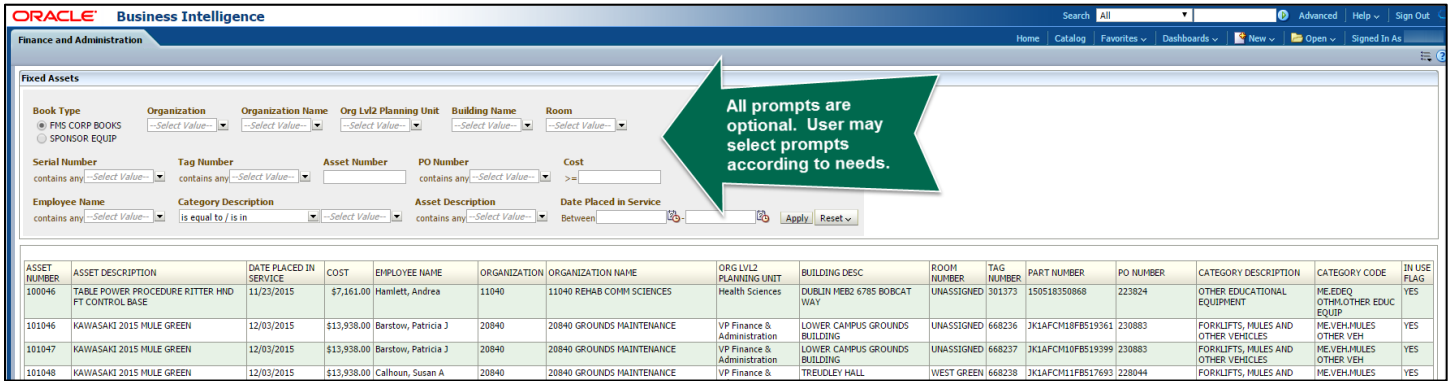


2. Navigate to the bottom of the list – **Finance and Administration Dashboards** and choose the **Finance and Administration** dashboard link.



Running the Fixed Assets dashboard page

1. The dashboard will automatically return all data. To search for specific Organizations (Department Numbers), see subsequent steps. Users have the ability to search within the prompt or type the Organization Number(s) (for example) that should be separated by semi-colons.



Fixed Assets

Book Type: FMS CORP BOOKS SPONSOR EQUIP

Organization: --Select Value--

Organization Name: --Select Value--

Org Lvl2 Planning Unit: --Select Value--

Building Name: --Select Value--

Room: --Select Value--

Serial Number: contains any --Select Value--

Tag Number: contains any --Select Value--

Asset Number: >=

PO Number: contains any --Select Value--

Cost: >=

Employee Name: contains any --Select Value--

Category Description: is equal to / is in --Select Value--

Asset Description: contains any --Select Value--

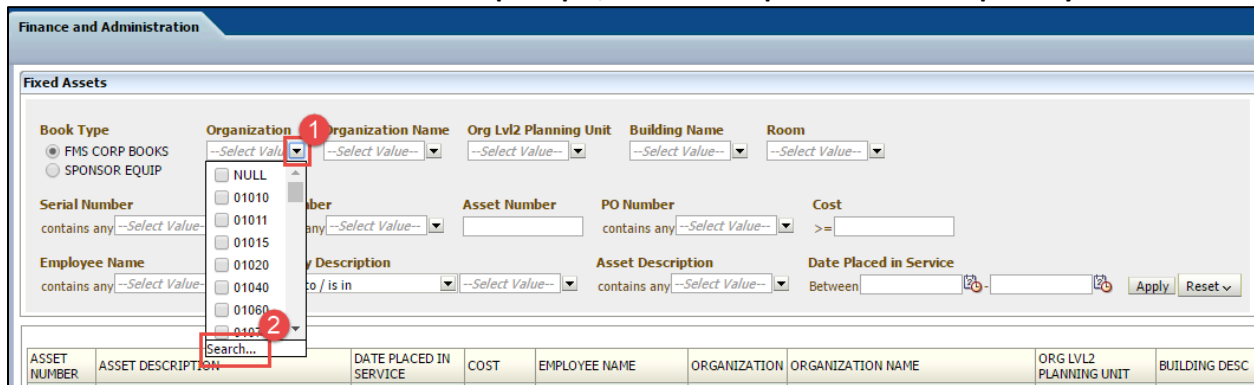
Date Placed in Service: Between

Apply Reset

ASSET NUMBER	ASSET DESCRIPTION	DATE PLACED IN SERVICE	COST	EMPLOYEE NAME	ORGANIZATION	ORGANIZATION NAME	ORG LVL2 PLANNING UNIT	BUILDING DESC	ROOM	TAG NUMBER	PART NUMBER	PO NUMBER	CATEGORY DESCRIPTION	CATEGORY CODE	IN USE FLAG
100046	TABLE POWER PROCEDURE RITTER HND FT CONTROL BASE	11/23/2015	\$7,161.00	Hamlett, Andrea	11040	11040 REHAB COMM SCIENCES	Health Sciences	DUBLIN MERZ 6785 BOBCAT WAY	UNASSIGNED	301373	150518350868	223824	OTHER EDUCATIONAL EQUIPMENT	MEDEQ	YES
101046	KAWASAKI 2015 MULE GREEN	12/03/2015	\$13,938.00	Barstow, Patricia J	20840	20840 GROUNDS MAINTENANCE	VP Finance & Administration	LOWER CAMPUS GROUNDS BUILDING	UNASSIGNED	668236	JK1AFCH18FB519361	230883	FORKLIFTS, MULES AND OTHER VEHICLES	MEVEH/MULES OTHER VEH	YES
101047	KAWASAKI 2015 MULE GREEN	12/03/2015	\$13,938.00	Barstow, Patricia J	20840	20840 GROUNDS MAINTENANCE	VP Finance & Administration	LOWER CAMPUS GROUNDS BUILDING	UNASSIGNED	668237	JK1AFCH10FB519399	230883	FORKLIFTS, MULES AND OTHER VEHICLES	MEVEH/MULES OTHER VEH	YES
101048	KAWASAKI 2015 MULE GREEN	12/03/2015	\$13,938.00	Calhoun, Susan A	20840	20840 GROUNDS MAINTENANCE	VP Finance &	TREUDLEY HALL	WEST GREEN	668238	JK1AFCH11FB517693	228044	FORKLIFTS, MULES AND	MEVEH/MULES	YES

Searching within a Prompt

1. Upon opening the report, choose the selected prompt drop down and click Search...
 - a. Note: Search... is available in all prompts, screenshots provided as example only.



Fixed Assets

Book Type: FMS CORP BOOKS SPONSOR EQUIP

Organization: --Select Value--

Organization Name: --Select Value--

Org Lvl2 Planning Unit: --Select Value--

Building Name: --Select Value--

Room: --Select Value--

Serial Number: contains any --Select Value--

Tag Number: contains any --Select Value--

Asset Number: >=

PO Number: contains any --Select Value--

Cost: >=

Employee Name: contains any --Select Value--

Category Description: is equal to / is in --Select Value--

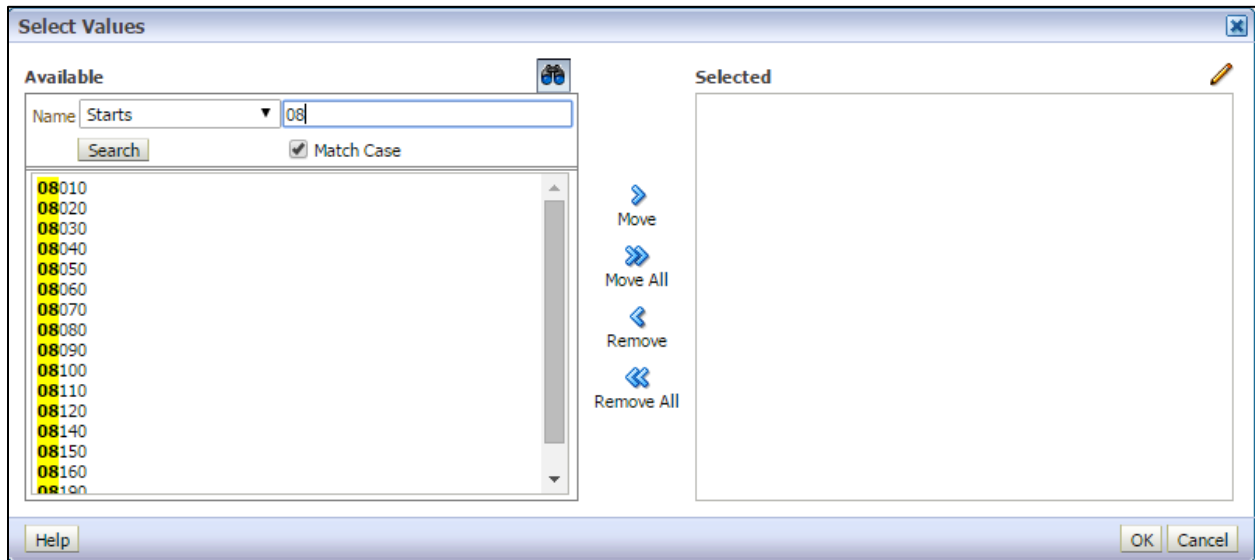
Asset Description: contains any --Select Value--

Date Placed in Service: Between

Apply Reset

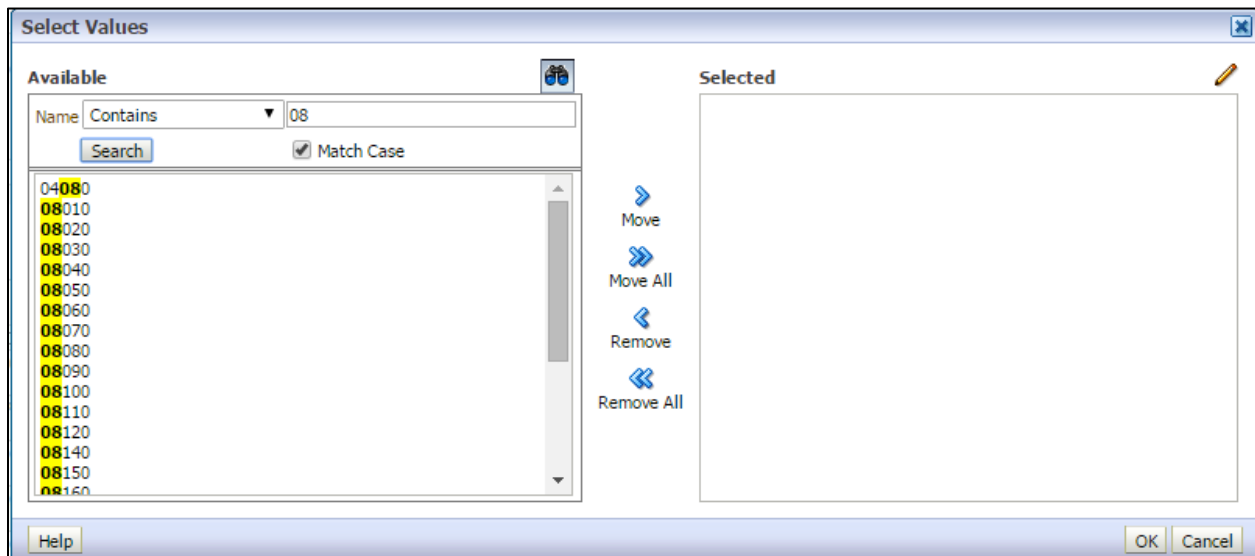
ASSET NUMBER	ASSET DESCRIPTION	DATE PLACED IN SERVICE	COST	EMPLOYEE NAME	ORGANIZATION	ORGANIZATION NAME	ORG LVL2 PLANNING UNIT	BUILDING DESC
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2. Use **Starts** if: user knows first letters of search string (searched items will highlight)



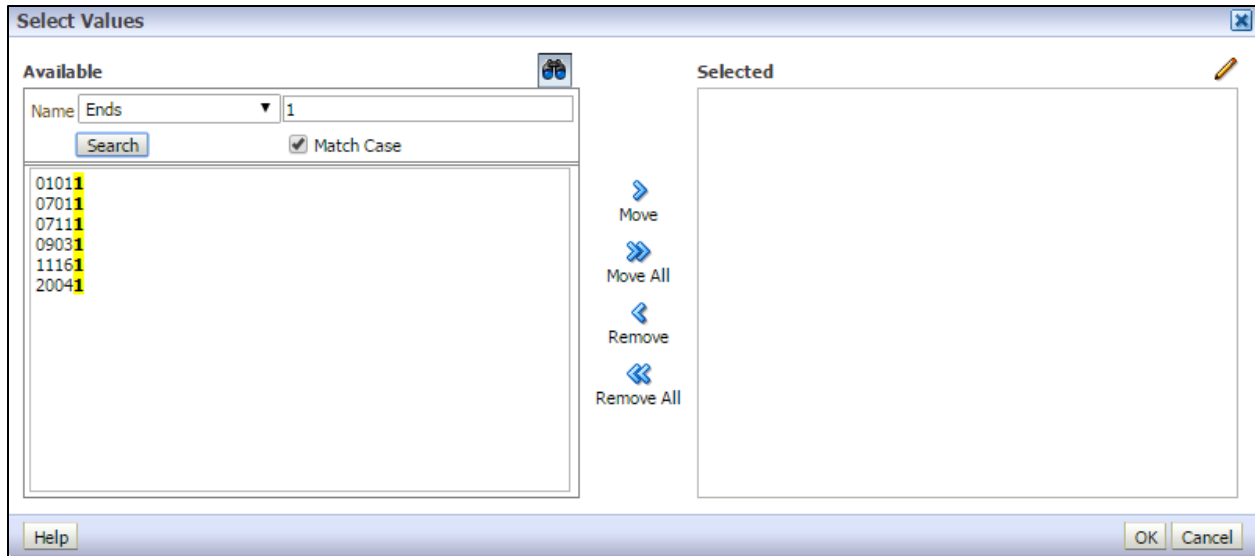
The screenshot shows the 'Select Values' dialog box. The 'Name' dropdown is set to 'Starts' and the search text is '08'. The 'Match Case' checkbox is checked. The 'Available' list contains the following values, all highlighted in yellow: 08010, 08020, 08030, 08040, 08050, 08060, 08070, 08080, 08090, 08100, 08110, 08120, 08140, 08150, 08160. The 'Selected' list is empty. The dialog box has 'Help', 'OK', and 'Cancel' buttons at the bottom.

3. Use **Contains** if: user knows a certain part of a search string. Will return any results with the letter/number combination entered (searched items will highlight).



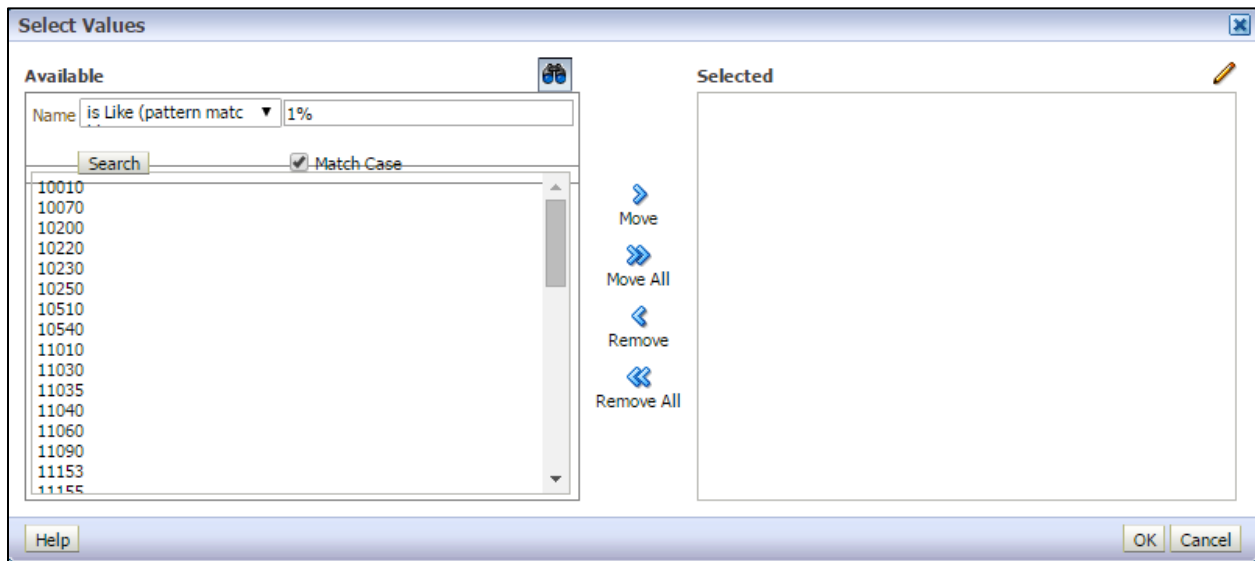
The screenshot shows the 'Select Values' dialog box. The 'Name' dropdown is set to 'Contains' and the search text is '08'. The 'Match Case' checkbox is checked. The 'Available' list contains the following values, all highlighted in yellow: 04080, 08010, 08020, 08030, 08040, 08050, 08060, 08070, 08080, 08090, 08100, 08110, 08120, 08140, 08150, 08160. The 'Selected' list is empty. The dialog box has 'Help', 'OK', and 'Cancel' buttons at the bottom.

4. Use **Ends** if: user knows the end of a word or search string. Will return any results with the letter/number combination entered (searched items will highlight). This search parameter is rarely used.



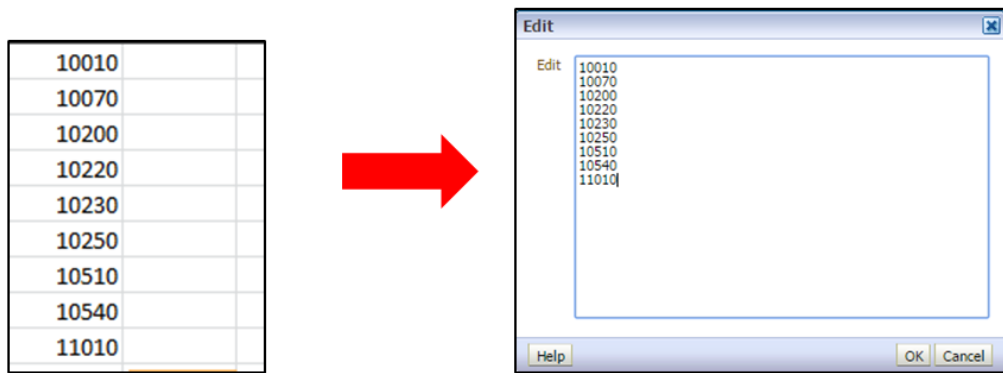
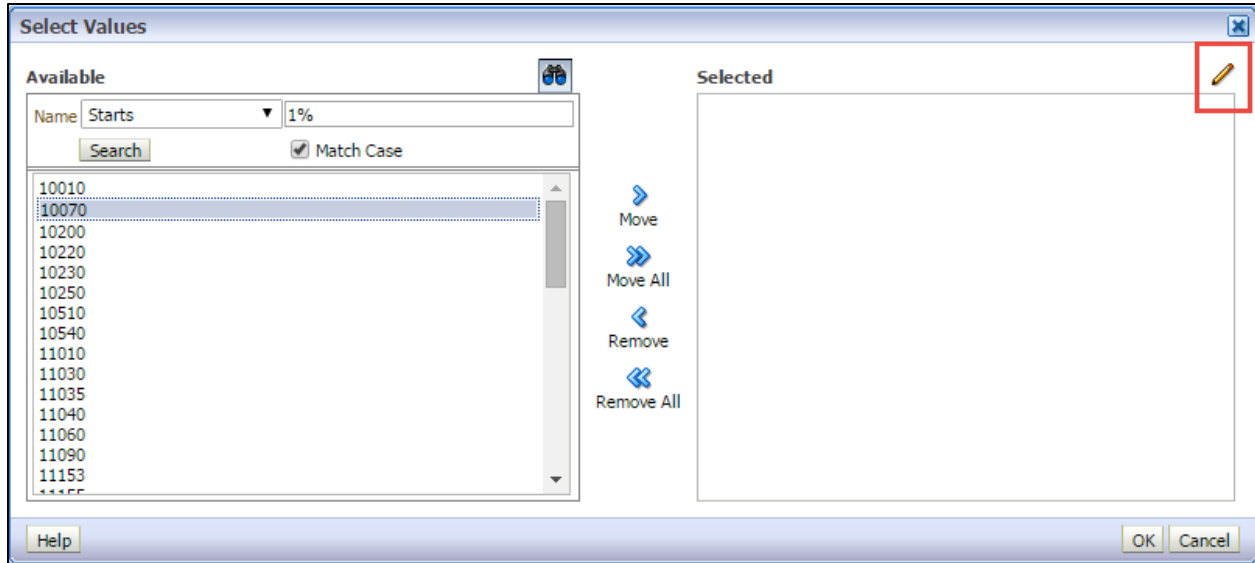
The screenshot shows the 'Select Values' dialog box. The 'Available' list on the left contains the following items: 01011, 07011, 07111, 09031, 11161, and 20041. The search criteria are 'Name: Ends' and '1'. The 'Match Case' checkbox is checked. The 'Selected' list on the right is empty. The dialog box includes 'Move', 'Move All', 'Remove', and 'Remove All' buttons between the lists, and 'Help', 'OK', and 'Cancel' buttons at the bottom.

5. Use **is Like** (pattern match) if : user would like to find any result like a certain search string. Note: use % to return results with **is Like**. **This operates like a wildcard.**



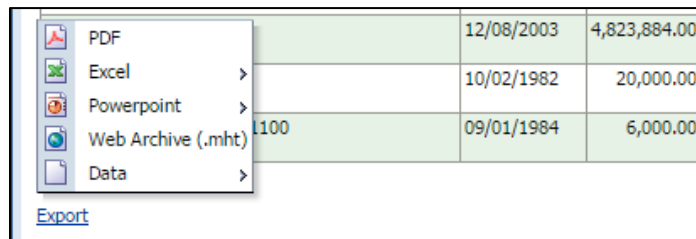
The screenshot shows the 'Select Values' dialog box. The 'Available' list on the left contains the following items: 10010, 10070, 10200, 10220, 10230, 10250, 10510, 10540, 11010, 11030, 11035, 11040, 11060, 11090, 11153, and 11155. The search criteria are 'Name: is Like (pattern matc)' and '1%'. The 'Match Case' checkbox is checked. The 'Selected' list on the right is empty. The dialog box includes 'Move', 'Move All', 'Remove', and 'Remove All' buttons between the lists, and 'Help', 'OK', and 'Cancel' buttons at the bottom.

- If data resides in external document, like Excel, can click the **Edit pencil** and paste a copied selection of data from Excel. Once user clicks OK, data appears in **Selected** pane in Filter.

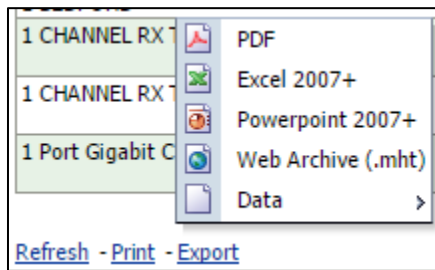


Fixed Assets dashboard page – Exporting

- At the bottom of page, there is an **Export** link. Click this link to choose from Export Options.



2. If choosing Excel, the recommendation is to choose Excel 2007+ to maintain format within OBI. User may select Data/CSV but **will not** retain formatting from within the OBI user interface.



3. Upon choosing export method, the document will download at the bottom of your browser. Double click to open.