Overview

This document outlines general instructions for using Ohio University’s Oracle Business Intelligence (OBI) system for the PO Summary View dashboard. OBI is a web-based reporting system used to support the campus community’s academic and administrative offices.

Questions?

Questions regarding PO Closure Status, Encumbrances, Invoices, etc. should be directed toward Finance Customer Care Center.

For technical difficulties, please contact the OBI team.

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).

**PO Summary Dashboard Navigation** –

1. Click Dashboards and click on PO Summary View in the Finance and Administration Dashboards section
PO Summary View Dashboard: Best Practices

1. If searching for Open Purchases Orders with a $0.00 open amount, you must put in an approval date range and at least a single Organization and/or Org Lvl2 Planning Unit. Otherwise, the result set will be too large and the dashboard page will timeout without returning results.

2. If searching for Open Purchase Orders, it is recommended to search within at least one Organization or Planning Unit and date range.

PO Summary View Dashboard: Explanation of Prompts

- **PO Number**: Purchase Order number. Does not include Prefix.
- **PO Prefix**: Preceding letter(s)/number(s) to Purchase Order number. Example: OUP
- **Supplier**: Name of supplier/vendor to which the Purchase Order remits payment.
- **Buyer**: Procurement staff member responsible for Purchase Order.
- **Requestor**: Ohio staff responsible for requesting Purchase Order creation.
- **Approval Date between**: Open text for put an approval date range on search.
- **Prevailing Wage**: Indicates restrictions on Purchase Order.
- **Closure Status**: Status of Purchase Order according to the Oracle Accounts Payable eBusiness Suite module. Questions about closure status should be directed to the Finance Customer Care Center.
- **Project Mgr Name**: Ohio staff member responsible for project account.
- **Open Amount**: Open amount of Purchase Order. User will need to know exact amount open. This field should be used for an exception Purchase Orders in Open status with an open amount of $0.00. User does not need dollar sign ($) to search. Questions about closure status should be directed to the Finance Customer Care Center.
- **Account**: Account string that does not include Natural Account
- **Fund Type**: The three digit code designated as the balancing segment within the account code structure. It is used to distinguish between the University and Foundation within FMS. Its main purpose within each of these entities is to group types of funds together.
- **Fund**: The four digit code that differentiates between the pools of money that are used to record revenue and expenditures.
- **Organization**: The five digit code that represents the core departments within the University.
- **Natural Account**: The six digit code that properly classifies all accounting transactions. It is used to indicate whether an accounting line is recorded as an expense, revenue, asset, or liability.
- **Project**: Captures costs of programs/projects/activities of the core departments (organization segment) within the University. It is also the link to the Project Accounting module for those accounts that utilize it.
- **Org Lvl2 Planning Unit**: High level Planning Unit that houses the many organizations.
PO Summary View Dashboard: Running a dashboard page query

1. A prompt page will appear and user may select any, all of the filters for the list. Selecting criteria will limit the result set. Note: user is not required to select any search criteria parameters, but if none are selected, user will receive an error.

   ![PO Summary View Dashboard](image1)

2. Once parameters have been selected, click **Apply** to run report.

   ![PO Summary View Dashboard](image2)
3. The results will display below the search parameters.

4. The user may select to view all of the Purchase Orders at a summary level (the first table) and export the dashboard page as an Excel.
5. To view the PO line details, click on the **PO Number**.

[Image: PO Summary View]

Clicking the PO Number will display the PO Line Details below.

6. To view PO Invoices, click on the **Invoice** link to see paid invoices in a new window. These are sorted in date order.

[Image: PO Invoices]
Exception Reports –

1. There are two exception reports that are available on the Reports tab.
   a. Invoices Payments and Checks – includes detailed information about payments for invoices to suppliers
      i. Prompts on Fiscal Year (Required), Period Name, Invoice Number, PO Number, etc.
   b. PO Lines and Distribution – includes detailed information about purchase orders including status,
      supplier, encumbered amount, matched amount and open amount
      i. Prompts on Approval Date, Open Amount, PO Prefix, PO Number, Closure Status, Org, etc.

2. To run an exception report, simply click once on the report you wish to run and the prompt page will appear.
3. If the incorrect report is chosen, user may navigate via the bread crumb navigation at the bottom left of the report. **Do not** click the back button on your browser.
PO Summary View Dashboard: Searching within a Prompt

1. Choose the selected prompt drop down and click **Search**…

2. A search box will appear, and user is able to search within the drop down menu instead of scrolling through. If user knows the beginning of a field, they can begin typing. Uncheck **Match Case** if user is unsure of format of search. (In example, the search is for only a specified Org number(s)).
3. If user has a list of value in an Excel or Word document, copy the values from the document and click the **Pencil Editor** (top right) and paste values, click OK and the values will appear in the **Selected** section.
4. There are 4 available search parameters: Starts, Contains, Ends, is Like (pattern match).

See use cases below:

a. Use **Starts** if: user knows first letter(s)/number(s) of search string (searched items will highlight).
b. **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).

![Select Values](image1)

- **Available**
  - Name: Contains
- **Selected**
  - Search: [ ]
  - Match Case: [ ]
  - Results:
    - 00000 INTERNATIONAL AFFAIRS
    - 00000 ENGLISH
    - 00000 CIBED
    - 00000 TEACHER EDUCATION
    - 00000 CIVIL ENGINEERING
    - 00000 AVIATION
    - 00000 AVIATION PLANES
    - 00000 CHEM BIOMOLEC ENGINEER
    - 00000 CIVIL ENGINEERING
    - 00000 EECS ELECTRICAL ENGR
    - 00000 EECS COMPUTER SCIENCE
    - 00000 ENGINEERING TECH AND MGT
    - 00000 INDUSTRIAL SYSTEMS ENG
    - 00000 MECHANICAL ENGINEERING
    - 00000 AVIATION RESEARCH

![Select Values](image2)

- **Available**
  - Name: Ends
- **Selected**
  - Search: [ ]
  - Match Case: [ ]
  - Results:
    - 001000 ICA STRENGTH CONDITION
    - 001000 SPORTS ADMINISTRATION
    - 002000 DEAN EDUCATION
    - 002000 CTR FOR HIGHER EDUCATION
    - 002000 TEACHER EDUCATION
    - 002000 AVIATION
    - 003000 SU ADMINISTRATION
    - 004000 DESIGN AND CONSTRUCTION
    - 005000 CORE ADMINISTRATION
    - 006000 EN CONTINUING EDUCATION
    - 007000 EA EDUCATION
    - 008000 CH CONTINUING EDUCATION
    - 009000 SO CONTINUING EDUCATION
    - 001001 ICA STRENGTH CONDITION

![Select Values](image3)

- **Available**
  - Name: Contains
- **Selected**
  - Search: [ ]
  - Match Case: [ ]
  - Results:
    - 00000 INTERNATIONAL AFFAIRS
    - 00000 ENGLISH
    - 00000 CIBED
    - 00000 TEACHER EDUCATION
    - 00000 CIVIL ENGINEERING
    - 00000 AVIATION
    - 00000 AVIATION PLANES
    - 00000 CHEM BIOMOLEC ENGINEER
    - 00000 CIVIL ENGINEERING
    - 00000 EECS ELECTRICAL ENGR
    - 00000 EECS COMPUTER SCIENCE
    - 00000 ENGINEERING TECH AND MGT
    - 00000 INDUSTRIAL SYSTEMS ENG
    - 00000 MECHANICAL ENGINEERING
    - 00000 AVIATION RESEARCH

![Select Values](image4)

- **Available**
  - Name: Ends
- **Selected**
  - Search: [ ]
  - Match Case: [ ]
  - Results:
    - 001000 ICA STRENGTH CONDITION
    - 001000 SPORTS ADMINISTRATION
    - 002000 DEAN EDUCATION
    - 002000 CTR FOR HIGHER EDUCATION
    - 002000 TEACHER EDUCATION
    - 002000 AVIATION
    - 003000 SU ADMINISTRATION
    - 004000 DESIGN AND CONSTRUCTION
    - 005000 CORE ADMINISTRATION
    - 006000 EN CONTINUING EDUCATION
    - 007000 EA EDUCATION
    - 008000 CH CONTINUING EDUCATION
    - 009000 SO CONTINUING EDUCATION
    - 001001 ICA STRENGTH CONDITION

**c. 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.
d. 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**.