Overview
This document outlines general instructions for using Ohio University’s Oracle Business Intelligence (OBI) system for Budget Planning and Analysis financial data. OBI is a web-based reporting system used to support the campus community’s academic and administrative offices.

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).

Financial Reporting Navigation –
1. Click Catalog to display Catalog folder structure on left pane.

2. Navigate to Finance and Administration > Published Reports > Financial Reporting > RCM Reports
   a. RCM Reports are available at Org Level 2 and Org Level 6 (see data dictionary for definitions)
Financial Reporting: Running a report

1. To run a report, click **Open**.
   a. Choose the YTD Income Statement

2. A prompt page will appear and you must select any prompt denoted with an asterisk as this a required field. Selecting additional criteria will further limit the result set. Once required prompts are selected, the OK button will be available to run the results.

3. Click **OK** to run report.
4. Once you have hit **OK** the results will display in the window.

Financial Reporting – Exporting a report

1. 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+ or Data/CSV for optimum performance. Choosing Excel 2003 is non-standard HTML based format. Choosing Data/CSV will not retain formatting.

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