**OBJECTIVE**
Harvard University is implementing Oracle Business Intelligence (OBI) to modernize the University’s financial reporting platform. By the fall 2017, the 32 CREW Financial reports will be replaced with 14 Financial Dashboards.

**OVERVIEW**

**Why**
Our current system, Common Reporting Environment for Reporting (CREW), has served as the institutional reporting tool for over a decade. Over time, the University’s reporting requirements to stakeholders have evolved, and new technological innovations have come to market. The migration of financial reports from CREW to OBI is part of the multi-year initiative known as the Modernization of Financial Reporting (MoFR) Project.

**What**
OBI (Oracle Business Intelligence) is a modern reporting platform that allows users to navigate across subject areas, drill into transaction details, save customizations and easily export data.

**Who**
FAS departmental administrators and/or financial staff with financial responsibilities who currently use CREW to generate financial reports.

**When**
FAS is partnering with the HUIT project team and will use the following timeline for implementation:

- January 2017 – Pilot with select departments
- April 2017 – Pilot with additional departments
- July – October 2017 – Rollout to remaining departments
- November 2017 – Decommission of CREW Financial Reports

**BENEFITS**
- Improved run times
- More intuitive, clearly labeled data columns
- Greater flexibility with customization, sorting, filtering, and more
- Ability to quickly support ongoing enhancements as reporting needs change

**FEATURES**
- Export directly to Excel, CSV and other formats
- Filter and sort data directly in dashboard
- Include additional data elements
- Exclude column(s) not relevant to you
**OBI PREVIEW**

*Example (Detail Transaction Listing)*

![Example screenshot of an OBI dashboard and transaction listing](image)

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### Transaction Listing Table

<table>
<thead>
<tr>
<th>Tab</th>
<th>Fiscal Year</th>
<th>Period</th>
<th>Org</th>
<th>Object Fund</th>
<th>Activity</th>
<th>Selectivity</th>
<th>Role</th>
<th>Creation Date</th>
<th>Pasted Date</th>
<th>Effective Date</th>
<th>Journal #</th>
<th>Ref #</th>
<th>Description</th>
<th>Entry Date</th>
<th>Reference Date</th>
<th>Type</th>
<th>Amount</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
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<td>2015-16</td>
<td>MAR-15</td>
<td>B576</td>
<td>00000</td>
<td>00000</td>
<td>00000</td>
<td>0000</td>
<td>01/01/2015</td>
<td>01/01/2015</td>
<td>01/01/2015</td>
<td>2015-16</td>
<td>0</td>
<td>Payments USD</td>
<td>2015-16</td>
<td>01/01/2015</td>
<td>2015-16</td>
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</tr>
</tbody>
</table>

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*Enter applicable values in prompts, then click Next to navigate to the next set of prompts.*