



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)

The screenshot shows the Oracle Business Intelligence (OBI) interface. At the top, the 'Dashboards' menu is highlighted with a red arrow. Below the main dashboard area, a 'Prompts' dialog box is open, titled 'Please choose Time Frame for the Report'. It contains several dropdown menus for 'Period', 'Effective Date', 'Closing Selection', and 'Posted Date'. A red callout box points to the 'Next' button with the text: 'Enter applicable values in prompts, then click Next to navigate to the next set of prompts.' To the right of the prompts, a 'Dashboards' dropdown menu is open, showing a list of reports including 'Detail Transaction Listing (DTL)', which is highlighted in yellow. Below the prompts, a 'DTL All' report is displayed with a time run of 9/29/2016 2:03:54 PM. The report is a table with columns for Fiscal Year, Period, Org, Object, Fund, Activity, Subactivity, Root, Creation Date, Posted Date, Effective Date, Journal Batch, Batch Desc., Journal Header, Journal Source, Journal Category, Line Desc., Object Type Description, Transaction Amt, and Units. The table contains 8 rows of transaction data for the year 2016, all with a transaction amount of 0.

Tub	Fiscal Year	Period	Org	Object	Fund	Activity	Subactivity	Root	Creation Date	Posted Date	Effective Date	Journal Batch	Batch Desc.	Journal Header	Journal Source	Journal Category	Line Desc.	Object Type Description	Transaction Amt	Units
	2016	MAR-16	6570				0000	00000	03/03/2016	03/03/2016	03/03/2016			Payments USD	AP 015-PCARD Entries	Payments		Expense		0
	2016	MAR-16	6570				0000	00000	03/10/2016	03/10/2016	03/10/2016			Payments USD	AP 015-PCARD Entries	Payments		Expense		0
	2016	MAR-16	6570				0000	00000	03/03/2016	03/03/2016	03/03/2016			Payments USD	AP 015-PCARD Entries	Payments		Expense		0
	2016	MAR-16	6570				0000	00000	03/03/2016	03/03/2016	03/03/2016			Payments USD	AP 015-PCARD Entries	Payments		Expense		0
	2016	MAR-16	6570				0000	00000	03/10/2016	03/10/2016	03/10/2016			Payments USD	AP 015-PCARD Entries	Payments		Expense		0
	2016	MAR-16	6570				0000	00000	03/10/2016	03/10/2016	03/10/2016			Payments USD	AP 015-PCARD Entries	Payments		Expense		0
	2016	MAR-16	6570				0000	00000	03/17/2016	03/17/2016	03/17/2016			Payments USD	AP 015-PCARD Entries	Payments		Expense		0
	2016	MAR-16	6570				0000	00000	03/17/2016	03/17/2016	03/17/2016			Payments USD	AP 015-PCARD Entries	Payments		Expense		0