Caltech | Data Warehouse
OBI News

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New Report

A new report, *AiM Work Order Costs*, is now available on the *Costs & Commitments* tab of the OBI Report Listings. This report includes information about a work order and the transactions (costs) associated that have been interfaced to Oracle Grants. If you have any questions about information you see within the report, please contact Facilities.

Enhanced Report

Eight new columns have been added to the *ITD Summaries (Export)* report dashboard's *Full PTA Summary - Export* version: ITD Direct Budget, ITD Direct Budget - RU, ITD Indirect Budget, ITD Indirect Budget - RU, ITD Direct Costs, ITD Direct Costs - RU, ITD Indirect Costs, and ITD Indirect Costs - RU. All eight columns are available for customizing other versions with the report.

For more information about customizing OBI reports or how to Export to Excel and then pivot on the data, please see the user guides available on both the *Help* tab in OBI and the IMSS website.

User Corner

Each newsletter, we highlight a common user question. This newsletter's question is, *Why don't I have the same columns on my report as somebody else?*

When this happens, it is usually one of two things:

1. You're looking at a different *version* of the report.

    a. Some reports have multiple versions available within the same report.

    b. After you run the report, you can toggle back and forth between the versions by using the LOV at the top of the report.

2. You've made a saved customization to the default report.

    a. If there's been an enhancement to the report with additional columns since the user has last saved their customization, those new columns will not be included in the report.

OBI Resources and Tips

The [IMSS website](#) offers users guides on everything from data logic to customizing a report.

New User Guide

A new *AiM Work Order Costs* report guide is available on the *Help* tab in OBI. The guide provides an overview of the new report, the data security applied to it, the parameters and the different sections and columns included in it.

Tip of the Newsletter!

Do you need to run a report of just the student stipends but don't have Labor Distribution access? You can use the *Cost Details (Export)* and filter for the Provider *CALTECH PAYROLL* and on the Exp Types:

- *Grad Assistantships*

- *Grad Fellowships*

- *NTR Grad Assistantships*
- *NTR Grad Fellowships*
- *Student Wages NB*
- *Supplemental Earnings NB*

   Note: *Student Wages NB* is used for both Undergrad and Graduate students, while *Supplemental Earnings NB* can be used for all person types.

Training Sessions

All training sessions are listed on the [IMSS website](#).

Training Videos

To make training available when you need it, we are transitioning our basic training classes to video. The following training is now available via video, and will no longer be offered in person:

- [Getting Started with OBI](#)
- [Introduction to Financials](#)
- [Costs and Commitments](#)
- [Award Installments and Summaries](#)

Virtual Office Hours

- Wednesday, April 6th at 2:00 p.m. with Meeting ID: 822 3852 4175
- Wednesday, April 27th at 11:00 a.m. with Meeting ID: 816 9334 6203

Labor Distribution

- Thursday, April 14th at 11:00 a.m. with Meeting ID: 853 4814 6815

Do you have an OBI issue or question?

Please send any OBI issues or questions to OBIHelp@caltech.edu rather than to individuals within IMSS. A member of our team will get back to you as soon as possible.