

Caltech | Data Warehouse

OBI News

In This Issue

- New OBI Email for Support
- New Reports
- Upcoming Training Sessions
- User Corner
- OBI Resources and Tips

New OBI Email for Support

Not sure how to get started with a report or just need some general guidance? Email OBHelp@caltech.edu for any questions or suggestions. A member of our team will respond as soon as possible.

Our help-datawarehouse@caltech.edu email is retiring. Please do not use [this email](mailto:help-datawarehouse@caltech.edu).

New Reports

Two new reports have been rolled out in OBI:

- Cost Detail (Pivot)
- FY Summary Over Time

The *Cost Detail (Pivot)* report is available on the **Costs & Commitments** tab and pivots costs over time. There are five different versions delivered, and you can customize by adding or removing columns, sorting, etc.

A user guide for the Cost Detail (Pivot) dashboard is in development. It details the different options available for customization. We will let you know as soon as it is available.

The *FY Summary Over Time* report is available on the **Summaries** report listing tab. This report provides FY summary information along with the period costs over time. The report is only available for FY-managed awards and can only be run for one fiscal year at a time because running it for multiple years causes issues with the summary data. If you would like costs over time for more than one fiscal year, please use the new *Cost Detail (Pivot)* report.

Upcoming Training Sessions

All training sessions are listed on the [IMSS Website](#). Training is offered remotely via Zoom. Please see the website prior to attending any class to check for any last-minute changes and that you have the correct Meeting ID.

Virtual Office Hours

- Tuesday, 8/17, 11:00 am - 12:00 pm
- Tuesday, 8/31, 11:00 am - 12:00 pm

OBI Introduction

- Wednesday, 8/18, 10:00 am - 11:30 am

Costs & Commitments

- Thursday, 8/19, 2:00 pm - 3:30 pm

Labor Distribution

- Monday, 8/23, 10:30 am - 12:00 pm

Summaries & Award Installments

- Wednesday, August 25, 10:30 am - 12:00 pm

User Corner

Each newsletter, we'll highlight a common user question. In this newsletter, we'll look at one of the most common answers to the question "Why did my cost transfer batch fail validation?".

The root cause of most cost transfer problems is using the wrong report to select expenses for transfer. Please use the ***Cost Transfers – Campus*** report to select expenses. This report will only show expenses eligible for cost transfer. Do not use any of the Cost Detail reports for selecting your cost transfer items because they report all costs and not only those eligible for transfer.

OBI Resources and Tips

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

In addition, the *Report Listing* and most reports in OBI have a ***Help*** tab that provides links relevant to the data warehouse and reports.

Tip of the Newsletter!

We've all been there before. You're in the middle of an amazing report customization and suddenly – just as you save – you get the infamous "Leave or stay on page" message!

The Data Warehouse time out is the same as access.caltech, which is exactly 30 minutes. To get around this, you'll want to:

- Refresh access.caltech frequently to avoid any timeouts with access.caltech.
 - Click on *Home* in the OBI header to avoid getting timed out in OBI.
 - Save, save, save. Save any changes you make to a customization immediately!
-

Do you have a question about OBI?

Send an email to OBHelp@caltech.edu and a member of our team will get back to you as soon as possible.