



Science & Technology  
Facilities Council

# OBIEE Spend Reports

STEPH RANKIN



## Introduction

OBIEE - **O**racle **B**usiness Intelligence **E**nterprise **E**dition is a business intelligence system for the enterprise that delivers abilities for reporting, ad hoc query and analysis, online analytical processing (OLAP), dashboards, and scorecards.



## Relationship between OBIEE and Oracle system.

OBIEE will reflect the data in the main Oracle system of the previous day, or exceptionally the day before.

There are no data in the OBIEE system that has not come from the main Oracle system, and no data values are changed.



## Accessing OBIEE

Access the Oracle E-Business Suite via  
<https://portal.ssc.rcuk.ac.uk/>.

Click on **Oracle E-Business Suite 12.1.3**

Log in with your STFC user credentials.

**Applications**

**Oracle E-Business Suite 12.1.3**  
This is the link to the E-Business Suite Production Environment.

**Siebel Grants**  
This is the link to the Grants Production Environment.

**Grants OBIEE**  
This is the link to the Grants OBIEE Report.

**Service Delivery KnowledgeBase**  
This is the link to KnowledgeBase: the refer

### Sign In

Enter your Single Sign-On user name and password to sign in.

User Name

Password



## Accessing OBIEE

Your Oracle password will expire every 90 days. If you get an error message "Authentication Failure", this is due to inputting your username or password incorrectly, or because your password has expired.

If the password has expired you have to reset your password in the Quest password management console using this link:

<https://letmein.ssc.rcuk.ac.uk/QPM/User/Identification/>

ORACLE Identity Management

Sign In

Error: Authentication failed. Please try again.

Sign In  
Enter your Single Sign-On user name and password to sign in.

User Name STFO6335@ph.rc  
Password ●●●●●●●●



## Oracle Application Home Page

You will find that you have responsibilities that permit you to carry out the tasks that you are entitled to do:

**MI STFC PA Projects (read only)**  
for access to project-related reports and

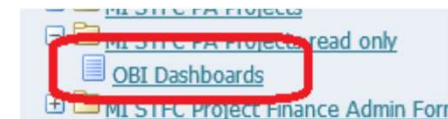
**MI STFC GL Enquiry and Report (read only)**  
for cost centre reports.  
*(NB: This will not be covered in this training)*

The screenshot displays the Oracle Application Home Page interface. On the left, the 'Main Menu' section is visible, featuring a 'Personalize' button and a list of menu items, each preceded by a plus sign in a square. The items include: 'Support Employee User', 'MI STFC AP Enquiry', 'MI STFC AR Enquiry', 'MI STFC FA Enquiry', 'MI STFC Finance Payroll', 'MI STFC GB Budget Accountant', 'MI STFC GB Budget Enquiry', 'MI STFC GL Enquiry and Report', 'MI STFC GL Enquiry and Report read only', 'MI STFC GL Head of Finance', 'MI STFC Inventory', 'MI STFC PA Projects', 'MI STFC PA Projects read only', and 'MI STFC Project Finance Admin Forms'. On the right, the 'Worklist' section is shown, with a 'From' header and a message stating 'There are no notifications in this view.' Below this, two green checkmarks indicate tips: 'TIP Out of Office Rules - Redirect or a' and 'TIP Worklist Access - Specify which u'.




- + Support Employee User
- + MI STFC AP Enquiry
- + MI STFC AR Enquiry
- + MI STFC FA Enquiry
- + MI STFC Finance Payroll
- + MI STFC GB Budget Accountant
- + MI STFC GB Budget Enquiry
- + MI STFC GL Enquiry and Report
- + MI STFC GL Enquiry and Report read only
- + MI STFC GL Head of Finance
- + MI STFC Inventory
- + MI STFC PA Projects
- + MI STFC PA Projects read only
- + MI STFC Project Finance Admin Forms

Click on one of the responsibility which will expand available options underneath. To open dashboards, click option **OBI Dashboards**.



## OBIEE

Clicking on **OBI Dashboards** opens a new window with OBIEE login screen. Here you need to again provide your oracle user id and password.



The screenshot shows the Oracle Business Intelligence login interface. At the top left, the Oracle logo and "Business Intelligence" text are visible. The main content area is a light blue gradient. On the right side, there is a white "Sign In" form. The form contains the following elements:

- Sign In** (Section Header)
- Enter your user id and password.
- User ID: A text input field containing "jtfrc6335@ph.rc" with a clear button (x).
- Password: A password input field with masked characters (dots).
- Sign In: A button.
- Accessibility Mode
- Language: A dropdown menu currently set to "English".





## Dashboards

Initially you will be faced with **My Dashboard**.

ORACLE Business Intelligence

My Dashboard

Home Catalog Favorites Dashboards New Open Signed In As Thomas Chacko Sign Out

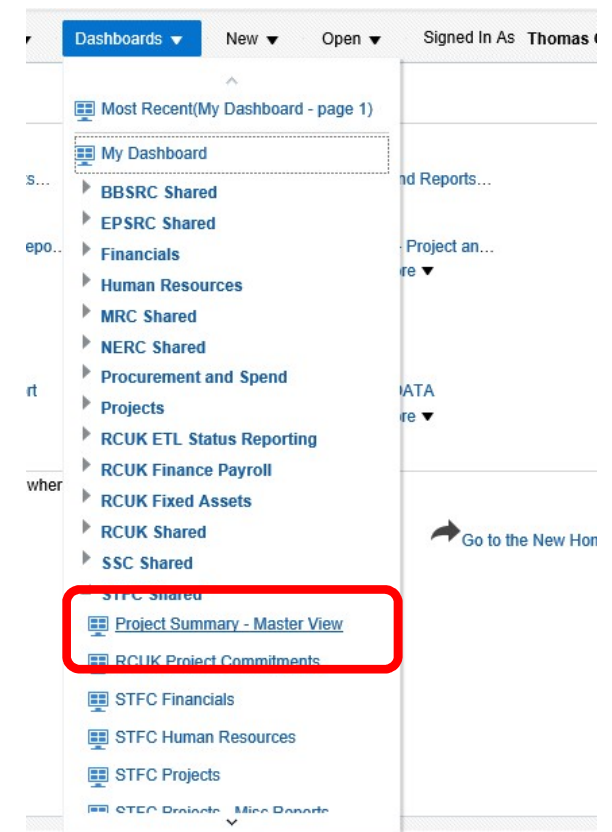
This page has no content.  
To add content, click [Edit](#) here or in the toolbar.

## Dashboards

All the available dashboards can be accessed from this menu.

All the STFC Dashboards can be seen under **STFC Shared**. Sometimes you might need to expand the list to see the dashboards.

You also might need to click on the small arrow down at the end of list to scroll down the list.



Oracle Applications Home Page | Oracle Applications R12 | Oracle BI Interactive Dashboa...

File Edit View Favorites Tools Help

Stephanie Jane Rankin - in... | STFC Intranet Home | Appraisals 2014-15 - All It... | Oracle Applications Home ... | Suggested Sites | Free Hotmail

ORACLE Business Intelligence

Search All [input type="text"] [magnifying glass icon] Advanced Help Sign Out

Home Catalog Favorites Dashboards New Open Signed In As Stephanie Rankin

Index | Project Manager Portfolio | Yearly Breakdown | Resource Breakdown - Yearly | Monthly Breakdown | Resource Breakdown - Monthly | Transaction Level - Expenditure

The following pages contain reports with financial data on STFC Projects

Reports are ordered in a fashion to present the top level figures first.  
Opening further reports will bring more detail for the selected Project(s).

<p>1. Project Manager Portfolio</p> <ul style="list-style-type: none"><li>Project Manager search filter</li><li>List of all projects from selected Project Manager</li><li>Option to extend the project list to belonging tasks</li><li>Total Project Expenditure figures</li></ul>	<p>Click on number 6 "Transaction Level - Expenditure"</p>	<p>5. Resource Breakdown - Monthly</p> <ul style="list-style-type: none"><li>Following the Monthly Report, Cost Categories are broken down to RCUK Resource Categories</li><li>Defaults to current fiscal year breakdown</li><li>Actual data only</li></ul>
<p>2. Yearly Breakdown</p> <ul style="list-style-type: none"><li>Yearly Expenditure Breakdown for selected Project(s)</li><li>Actual against Forecast and Budget data</li><li>Project and Task List figures</li><li>Inception to date and full project life period tracking</li><li>Closed Period and Open Data options</li></ul>		<p>6. Transaction Level - Expenditure</p> <ul style="list-style-type: none"><li>Drill down to Transaction level details</li><li>Actual data only, refreshed daily</li><li>Defaults to current fiscal year filter</li><li>More filters to narrow down the results</li><li>Options to customize the report by selecting different detail columns</li></ul>

175%

### Project Summary - Master View

Project Number: Please select p  
Project Name: --Select Value--  
Task Number: --Select Value--  
Task Name: --Select Value--  
Fiscal Year: 2018  
Fiscal Period: --Select Value--  
Resource Category: --Select Value--  
Apply Reset

STEP 1. Click on Drop down arrow. Click on "More/Search" GO TO NEXT SLIDE

STEP 2. If you require certain task numbers only then click on this drop down box. Remove the tick from NULL. Then scroll down the list and select relevant task number(s).

STEP 6. After clicking APPLY. CLICK on this drop down box and select RAW COST. Then Click APPLY at the side of this box.

No Results Analyze - Refresh

STEP 3. Fiscal year means financial year. FY 1819 is fiscal year 2018.

STEP 4. Fiscal Period is the month. So you may want to run the spend up to a closed period for instance April 2018 to July 2018.

STEP 5. CLICK APPLY



## How to select a project code once you have clicked on "More/Search"

The screenshot shows a web browser window displaying the Oracle BI interface. The main content is a 'Select Values' dialog box. The dialog has two main sections: 'Available' and 'Selected'. The 'Available' section contains a search field with 'Name Starts' selected, a 'Search' button, and a 'Match Case' checkbox. Below this is a list of project codes: NULL, ABC99999, CC/D000025/1, CC/D00005X/1, CC/D000084/1, CC/D000092/2, and CC/D000157/2. The 'Selected' section is currently empty, displaying the text 'Please select project(s)'. There are four double arrow buttons between the sections: a right-pointing arrow, a right-pointing double arrow, a left-pointing double arrow, and a left-pointing arrow. A 'More...' button is located at the bottom of the 'Available' list. The dialog also has 'OK' and 'Cancel' buttons at the bottom right. Three callout boxes provide instructions: 1. '1<sup>ST</sup> STEP. REMOVE "Please select project(s)" by clicking this double arrow' (pointing to the right-pointing double arrow). 2. '2<sup>ND</sup> STEP. Type in your project code' (pointing to the search field). 3. '3<sup>RD</sup> STEP. Click the double arrow to move the project code over to the right "Selected" box' (pointing to the left-pointing double arrow). A fourth callout box says 'FINAL STEP. Click OK. This then takes you back to the previous screen with a project code selected.' (pointing to the OK button). The browser's address bar shows the URL: https://obi.ssc.rcuk.ac.uk/analytics/saw.dll?Dashboard&acf=275512680&lang=en&locale=en-gb. The browser tabs include 'Oracle Applications Home Page', 'Oracle Applications R12', and 'Oracle BI Interactive Dashboa...'. The browser's address bar also shows 'Search...'. The browser's menu bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. The browser's status bar shows '175%' zoom level.

Project Summary

Project Manager

Project Number

Please select pr

Stephanie Rankin

enditu»

Apply Reset

ORACLE Business Intelligence

Search All

Advanced Help Sign Out

### Select Values

Available

Name Starts

Search

Match Case

NULL

ABC99999

CC/D000025/1

CC/D00005X/1

CC/D000084/1

CC/D000092/2

CC/D000157/2

Choices Returned: 1 - 512 + More...

Selected

Please select project(s)

1<sup>ST</sup> STEP. REMOVE "Please select project(s)" by clicking this double arrow

2<sup>ND</sup> STEP. Type in your project code

3<sup>RD</sup> STEP. Click the double arrow to move the project code over to the right "Selected" box

FINAL STEP. Click OK. This then takes you back to the previous screen with a project code selected.

OK Cancel



## Explanation of difference between "Dates" columns.

Browser address bar: [https://obi.ssc.rcuk.ac.uk/analytics/saw.dll?Dashboard&PortalPath=%2fshared%2fSTFC%20Shared%2f\\_portal%2fProject%20Summary%20-%2](https://obi.ssc.rcuk.ac.uk/analytics/saw.dll?Dashboard&PortalPath=%2fshared%2fSTFC%20Shared%2f_portal%2fProject%20Summary%20-%2)

Page Title: Project Summary - Master View

Navigation: Home Catalog Favorites Dashboards New Open Signed In As Stephanie Rankin

Filters: Project Number: STAK00001, Project Name: --Select Value--, Task Number: 03.01.03.03, Task Name: --Select Value--, Fiscal Year: 2018, Fiscal Period: --Select Value--, Resource Category: --Select Value--

Transaction Level - Expenditure

Data refreshed daily  
Time run: 9/7/2018 10:42:38 AM

Organization Tag: Incurred By Organization Name

Project Number	Project Name	Category	Resource Category	Task Number	Task Name	Cost Center Code	Cost Center Name	GL Account Number	Transaction ID	Item Date	Provider GL Date	Employee/Supplier	Incurred By Organization Name	RCUK Expenditure Comment	Quantity	UOM	Cost	
STAK00001	A Toroidal LHC ApparatuS	Non Pay	Services (excluding telecoms)	03.01.03.03	ATLAS - Glasgow travel FK02300	7CAAD	PPD SP Particle Physics	3422	20611676	05/04/2018	30/04/2018	Diallo, Mrs Andrea	STFC - Particle Physics Programme Support	Keys for Glasgow-Atlas Commuter flat	52.01	GBP	52.01	
									20737047	20/04/2018	30/05/2018	Diallo, Mrs Andrea	STFC - Particle Physics Programme Support	Furnishings Commuter apartment 62-20 Champs-Frechets	55.59	GBP	55.59	
				Travel & Subsistence UK	03.01.03.03	ATLAS - Glasgow travel FK02300	7CAAD	PPD SP Particle Physics	2307	20611675	27/03/2018	30/04/2018	Diallo, Mrs Andrea	STFC - Particle Physics Programme Support	Parking for shopping trip	0.77	GBP	0.77
				Services (excluding telecoms)	03.01.03.03	ATLAS - Glasgow travel FK02300	7CAAD	PPD SP Particle Physics	3422	20804100	07/06/2018	30/06/2018		STFC - Finance		607.49	GBP	607.49
										20874402	18/06/2018	30/06/2018		STFC - Finance		206.58	GBP	206.58
										20874403	18/06/2018	30/06/2018		STFC - Finance		37.01	GBP	37.01
										20874404	18/06/2018	30/06/2018		STFC - Finance		12.23	GBP	12.23
										21021973	11/07/2018	31/07/2018		STFC - Finance		311.73	GBP	311.73
										20521148	28/06/2017	10/04/2018	University of Glasgow		Short term travel costs for ATLAS Group - Glasgow University - FY17/18	3,935.35	GBP	3,935.35

Callout 1: The date of the procurement or the date the invoice has been put on to Oracle by UKSBS (points to Item Date)

Callout 2: The date the item has been received or processed by UKSBS (points to Provider GL Date)

ATLAS (points to Project Name)

Glasgow (points to Task Name)







## Export Options

Best way to do analysis of data is to obtain a dump in spreadsheet.

Use **Export** link at the bottom of the report to export to Excel, PDF or CSV etc. [Analyze](#) - [Print](#) - [Export](#)

It would be best to export using CSV format (not Excel) as then the project code and relevant task number appear against each transaction once exported. Plus it takes less time to run large reports and is easy to use for pivoting data.

Export in CSV and save as Excel.



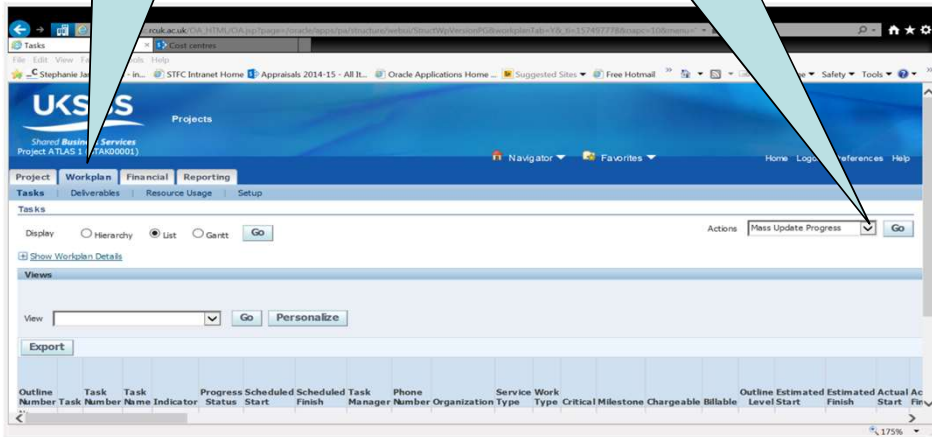
## HOW TO LOOK AT YOUR TASK STRUCTURE IN ORACLE

From the top page, click on **STFC PA Project Enquiry (SS)**, then click on **Projects**, then **Search Projects**, then type in your project number

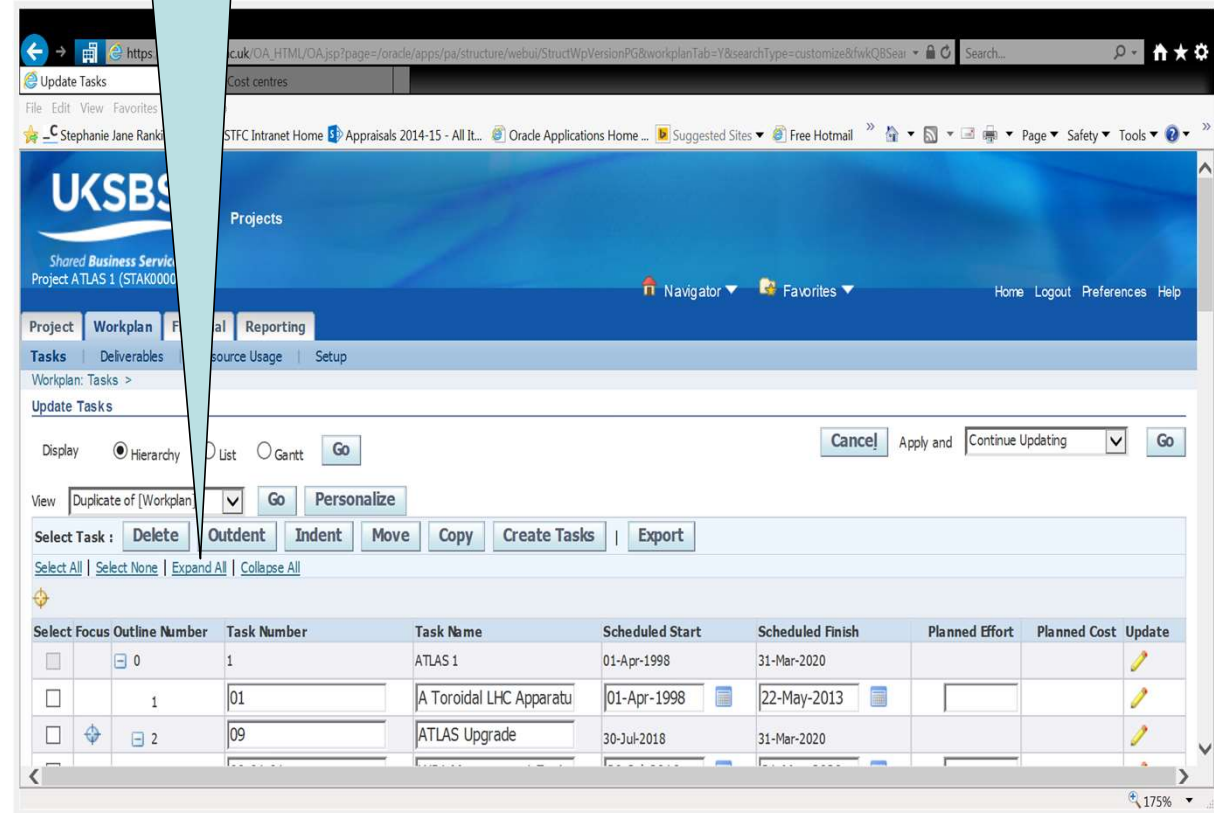
Click on **Workplan** to take you to this screen

Click on drop down arrow and select **Update Tasks** then press **Go**.

Click **Expand All** and this brings up the whole task and sub task structure



The screenshot shows the Oracle Project Enquiry (SS) Workplan screen. The 'Update Tasks' dropdown menu is open, showing options like 'Mass Update Progress' and 'Go'. The 'Go' button is highlighted, indicating the next step in the process.



The screenshot shows the Oracle Project Enquiry (SS) Workplan screen with the 'Update Tasks' screen. The 'Expand All' button is highlighted, and the task structure is displayed in a hierarchical view. The table below shows the task structure:

Select Focus	Outline Number	Task Number	Task Name	Scheduled Start	Scheduled Finish	Planned Effort	Planned Cost	Update
<input type="checkbox"/>	0	1	ATLAS 1	01-Apr-1998	31-Mar-2020			
<input type="checkbox"/>	1	01	A Toroidal LHC Apparatu	01-Apr-1998	22-May-2013			
<input type="checkbox"/>	2	09	ATLAS Upgrade	30-Jul-2018	31-Mar-2020			



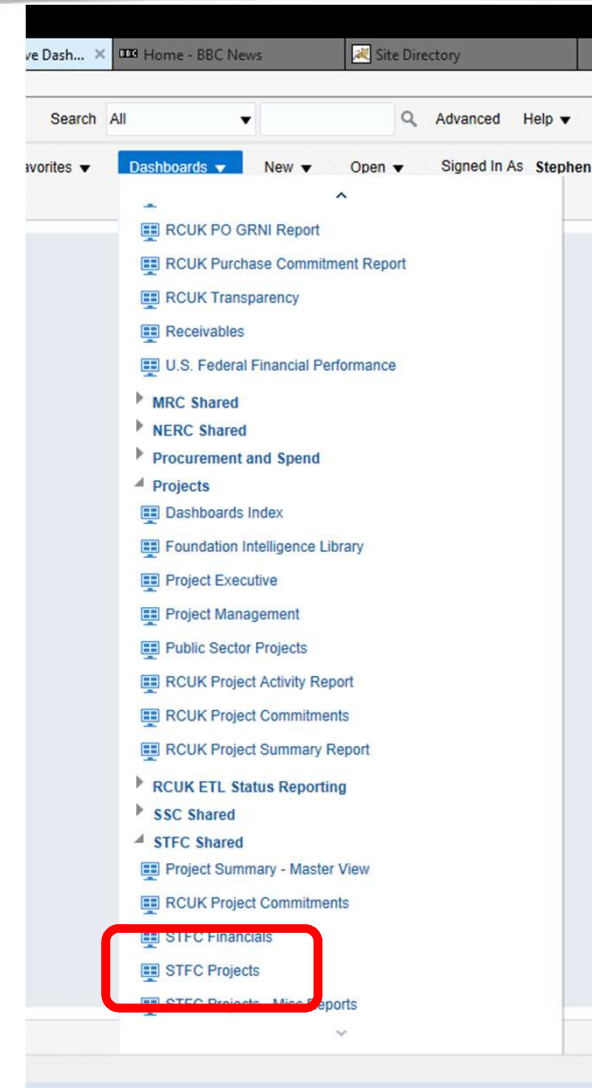
## Summary by Tasks

Previously, we encouraged people to use the **STFC Projects** Dashboard.

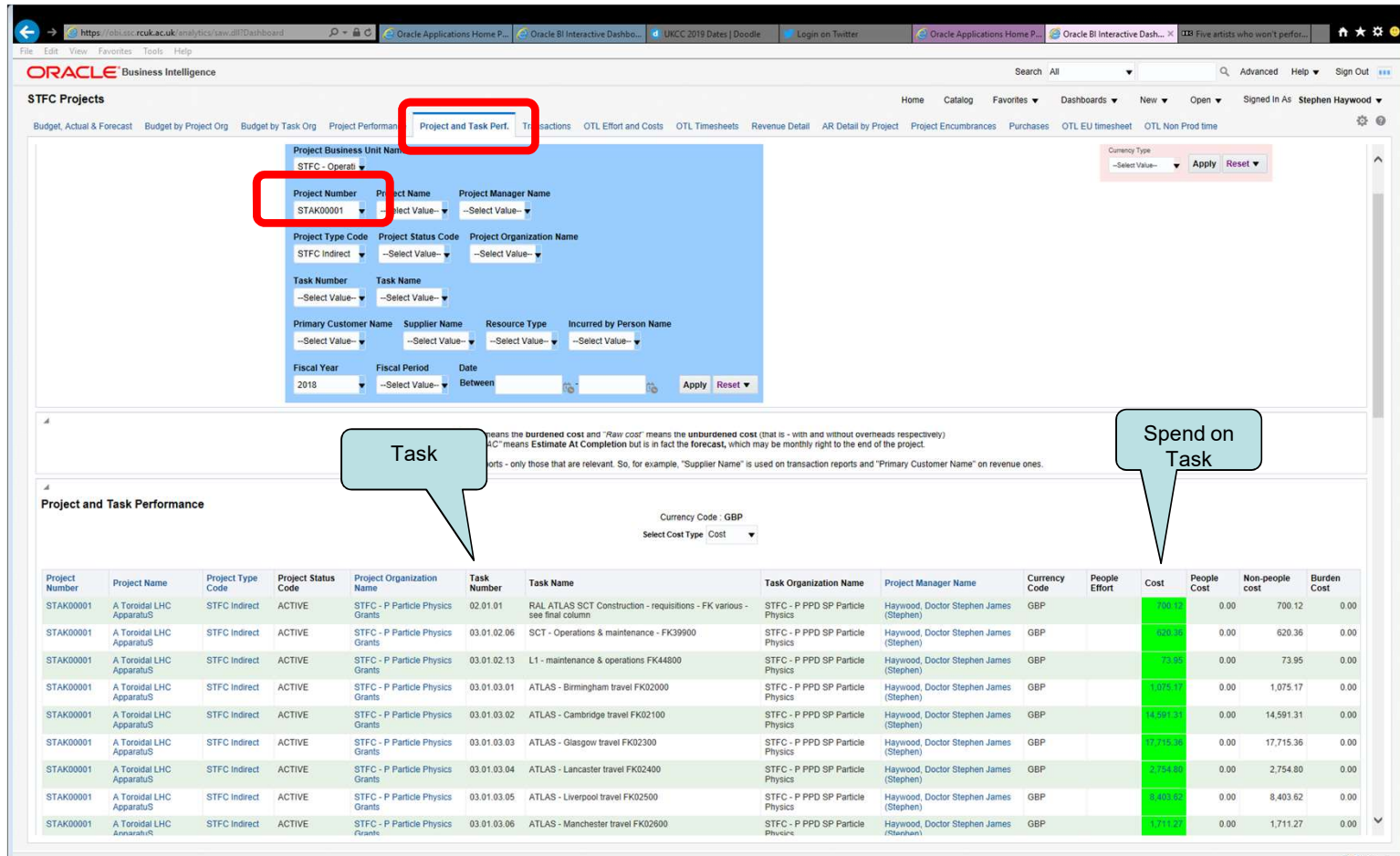
Irritatingly, “improvements” to the system mean that it is no longer possible to dig down into the details.

Nevertheless, **STFC Projects** does provide a good summary for all the tasks.

(For MasterView, this summary is best obtained by creating a dump for a complete Project in Excel, ordering by Task and adding subtotals.)



# Summary by Tasks



**Project and Task Performance**

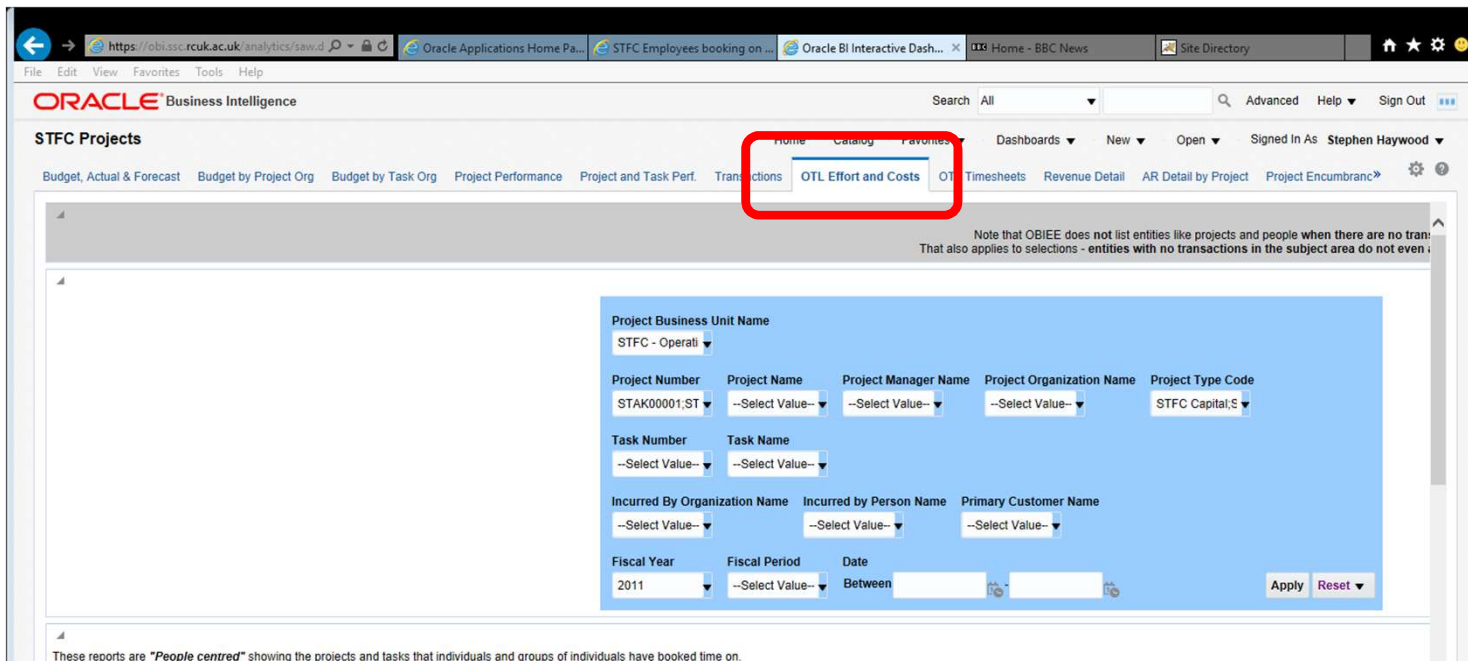
Currency Code: GBP  
Select Cost Type: Cost

Project Number	Project Name	Project Type Code	Project Status Code	Project Organization Name	Task Number	Task Name	Task Organization Name	Project Manager Name	Currency Code	People Effort	Cost	People Cost	Non-people cost	Burden Cost
STAK00001	A Toroidal LHC Apparatus	STFC Indirect	ACTIVE	STFC - P Particle Physics Grants	02.01.01	RAL ATLAS SCT Construction - requisitions - FK various - (see final column)	STFC - P PPD SP Particle Physics	Haywood, Doctor Stephen James (Stephen)	GBP		700.12	0.00	700.12	0.00
STAK00001	A Toroidal LHC Apparatus	STFC Indirect	ACTIVE	STFC - P Particle Physics Grants	03.01.02.06	SCT - Operations & maintenance - FK39900	STFC - P PPD SP Particle Physics	Haywood, Doctor Stephen James (Stephen)	GBP		620.36	0.00	620.36	0.00
STAK00001	A Toroidal LHC Apparatus	STFC Indirect	ACTIVE	STFC - P Particle Physics Grants	03.01.02.13	L1 - maintenance & operations FK44800	STFC - P PPD SP Particle Physics	Haywood, Doctor Stephen James (Stephen)	GBP		73.95	0.00	73.95	0.00
STAK00001	A Toroidal LHC Apparatus	STFC Indirect	ACTIVE	STFC - P Particle Physics Grants	03.01.03.01	ATLAS - Birmingham travel FK02000	STFC - P PPD SP Particle Physics	Haywood, Doctor Stephen James (Stephen)	GBP		1,075.17	0.00	1,075.17	0.00
STAK00001	A Toroidal LHC Apparatus	STFC Indirect	ACTIVE	STFC - P Particle Physics Grants	03.01.03.02	ATLAS - Cambridge travel FK02100	STFC - P PPD SP Particle Physics	Haywood, Doctor Stephen James (Stephen)	GBP		14,591.31	0.00	14,591.31	0.00
STAK00001	A Toroidal LHC Apparatus	STFC Indirect	ACTIVE	STFC - P Particle Physics Grants	03.01.03.03	ATLAS - Glasgow travel FK02300	STFC - P PPD SP Particle Physics	Haywood, Doctor Stephen James (Stephen)	GBP		17,715.36	0.00	17,715.36	0.00
STAK00001	A Toroidal LHC Apparatus	STFC Indirect	ACTIVE	STFC - P Particle Physics Grants	03.01.03.04	ATLAS - Lancaster travel FK02400	STFC - P PPD SP Particle Physics	Haywood, Doctor Stephen James (Stephen)	GBP		2,754.80	0.00	2,754.80	0.00
STAK00001	A Toroidal LHC Apparatus	STFC Indirect	ACTIVE	STFC - P Particle Physics Grants	03.01.03.05	ATLAS - Liverpool travel FK02500	STFC - P PPD SP Particle Physics	Haywood, Doctor Stephen James (Stephen)	GBP		8,403.62	0.00	8,403.62	0.00
STAK00001	A Toroidal LHC Apparatus	STFC Indirect	ACTIVE	STFC - P Particle Physics Grants	03.01.03.06	ATLAS - Manchester travel FK02600	STFC - P PPD SP Particle Physics	Haywood, Doctor Stephen James (Stephen)	GBP		1,711.27	0.00	1,711.27	0.00

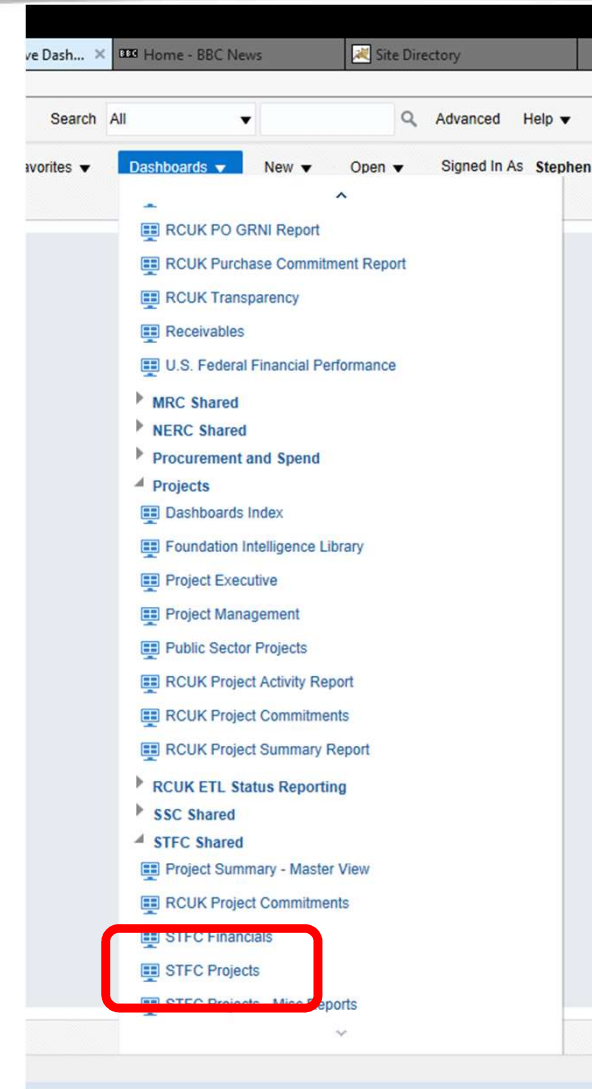
## Oracle Time & Labour (OTL) – for RAL Staff Effort

Select **STFC Projects** from Dashboards.

Select **OTL Effort and Costs** tab.



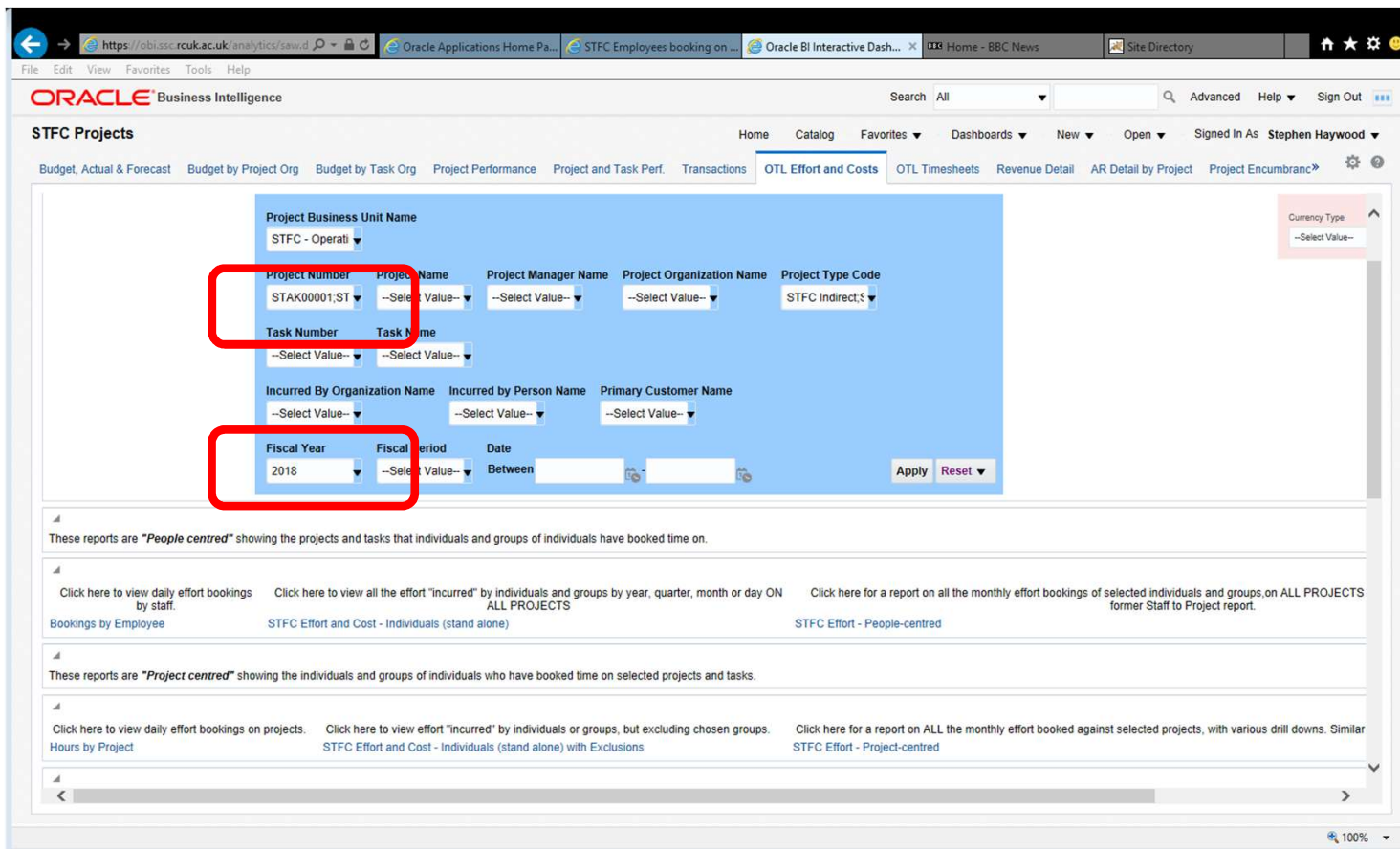
The screenshot shows the Oracle Business Intelligence (OBIEE) interface. The top navigation bar includes "Home", "Catalog", "Favorites", "Dashboards", "New", "Open", "Signed In As Stephen Haywood", and "Sign Out". The "OTL Effort and Costs" tab is highlighted with a red box. Below the navigation bar, there is a search bar and a "Sign Out" button. The main content area displays a form for selecting filters. The "Project Business Unit Name" is set to "STFC - Operati". The "Project Number" is "STAK0001:ST". The "Project Name" is "--Select Value--". The "Project Manager Name" is "--Select Value--". The "Project Organization Name" is "--Select Value--". The "Project Type Code" is "STFC Capital;S". The "Task Number" is "--Select Value--". The "Task Name" is "--Select Value--". The "Incurred By Organization Name" is "--Select Value--". The "Incurred by Person Name" is "--Select Value--". The "Primary Customer Name" is "--Select Value--". The "Fiscal Year" is "2011". The "Fiscal Period" is "--Select Value--". The "Date" is "Between". There are "Apply" and "Reset" buttons at the bottom right of the form. A note at the top of the main content area states: "Note that OBIEE does not list entities like projects and people when there are no transactions. That also applies to selections - entities with no transactions in the subject area do not even".



The screenshot shows the Oracle Business Intelligence (OBIEE) interface. The top navigation bar includes "Search", "All", "Advanced", and "Help". The "Dashboards" menu is open, showing a list of dashboards. The "STFC Projects" dashboard is highlighted with a red box. Other dashboards in the list include "RCUK PO GRNI Report", "RCUK Purchase Commitment Report", "RCUK Transparency", "Receivables", "U.S. Federal Financial Performance", "MRC Shared", "NERC Shared", "Procurement and Spend", "Projects", "Dashboards Index", "Foundation Intelligence Library", "Project Executive", "Project Management", "Public Sector Projects", "RCUK Project Activity Report", "RCUK Project Commitments", "RCUK Project Summary Report", "RCUK ETL Status Reporting", "SSC Shared", "STFC Shared", "Project Summary - Master View", "RCUK Project Commitments", "STFC Financials", and "STFC Projects - Misc Reports".



## Oracle Time & Labour (OTL) – Bookings



Oracle Business Intelligence

STFC Projects

Search All

Home Catalog Favorites Dashboards New Open Signed In As Stephen Haywood

Budget, Actual & Forecast Budget by Project Org Budget by Task Org Project Performance Project and Task Perf. Transactions **OTL Effort and Costs** OTL Timesheets Revenue Detail AR Detail by Project Project Encumbranc>

Project Business Unit Name  
STFC - Operati

Project Number Project Name Project Manager Name Project Organization Name Project Type Code  
STAK00001:ST --Select Value-- --Select Value-- --Select Value-- STFC Indirect:5

Task Number Task Name  
--Select Value-- --Select Value--

Incurred By Organization Name Incurred by Person Name Primary Customer Name  
--Select Value-- --Select Value-- --Select Value--

Fiscal Year Fiscal period Date  
2018 --Select Value-- Between

Apply Reset

Currency Type  
--Select Value--

These reports are "People centred" showing the projects and tasks that individuals and groups of individuals have booked time on.

Click here to view daily effort bookings by staff. Click here to view all the effort "incurred" by individuals and groups by year, quarter, month or day ON ALL PROJECTS. Click here for a report on all the monthly effort bookings of selected individuals and groups, on ALL PROJECTS former Staff to Project report.

Bookings by Employee STFC Effort and Cost - Individuals (stand alone) STFC Effort - People-centred

These reports are "Project centred" showing the individuals and groups of individuals who have booked time on selected projects and tasks.

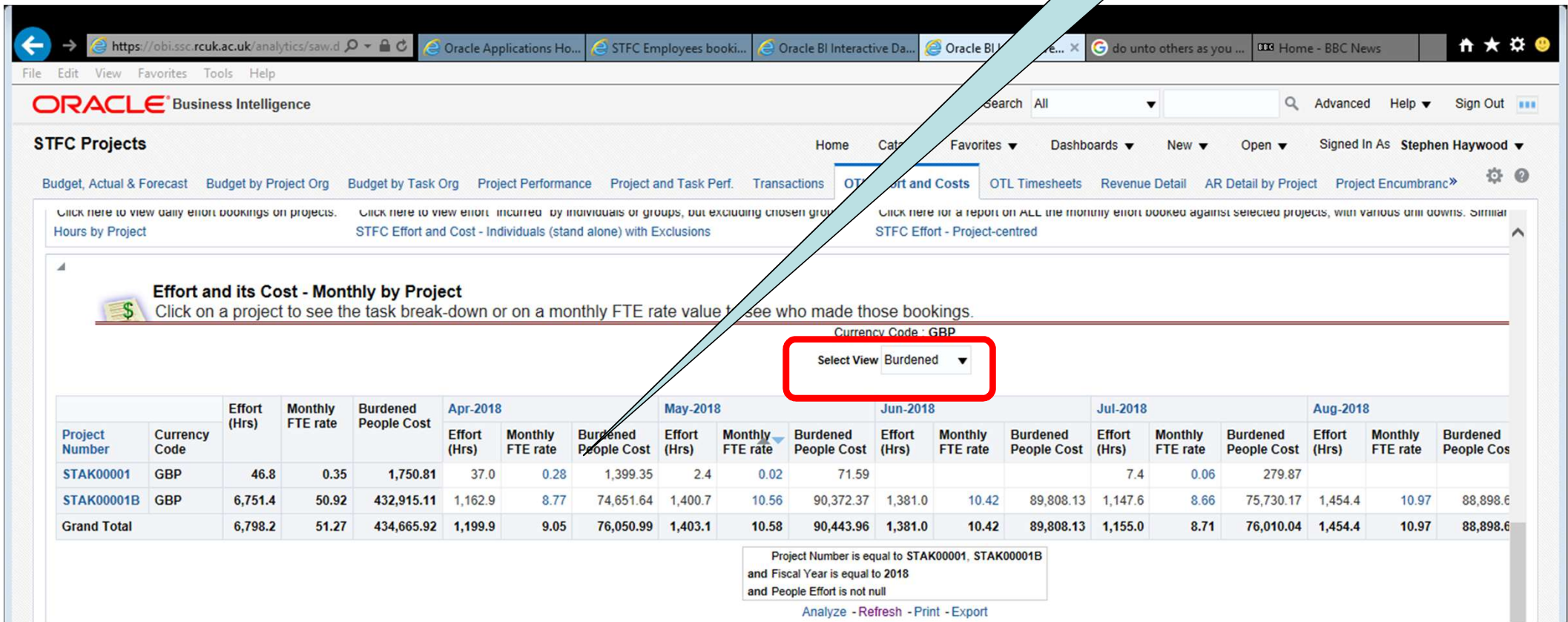
Click here to view daily effort bookings on projects. Click here to view effort "incurred" by individuals or groups, but excluding chosen groups. Click here for a report on ALL the monthly effort booked against selected projects, with various drill downs. Similar STFC Effort - Project-centred

Hours by Project STFC Effort and Cost - Individuals (stand alone) with Exclusions STFC Effort - Project-centred

100%

# Oracle Time & Labour (OTL) – Bookings

Click **Monthly FTE Rates** to get details



ORACLE Business Intelligence

STFC Projects

Home Categories Favorites Dashboards New Open Signed In As Stephen Haywood

Budget, Actual & Forecast Budget by Project Org Budget by Task Org Project Performance Project and Task Perf. Transactions **OTL Effort and Costs** OTL Timesheets Revenue Detail AR Detail by Project Project Encumbranc»

Click here to view daily effort bookings on projects. Click here to view effort incurred by individuals or groups, but excluding chosen group. Click here for a report on ALL the monthly effort booked against selected projects, with various drill downs. Similar Hours by Project STFC Effort and Cost - Individuals (stand alone) with Exclusions STFC Effort - Project-centred

**Effort and its Cost - Monthly by Project**  
Click on a project to see the task break-down or on a monthly FTE rate value to see who made those bookings.

Currency Code - GBP

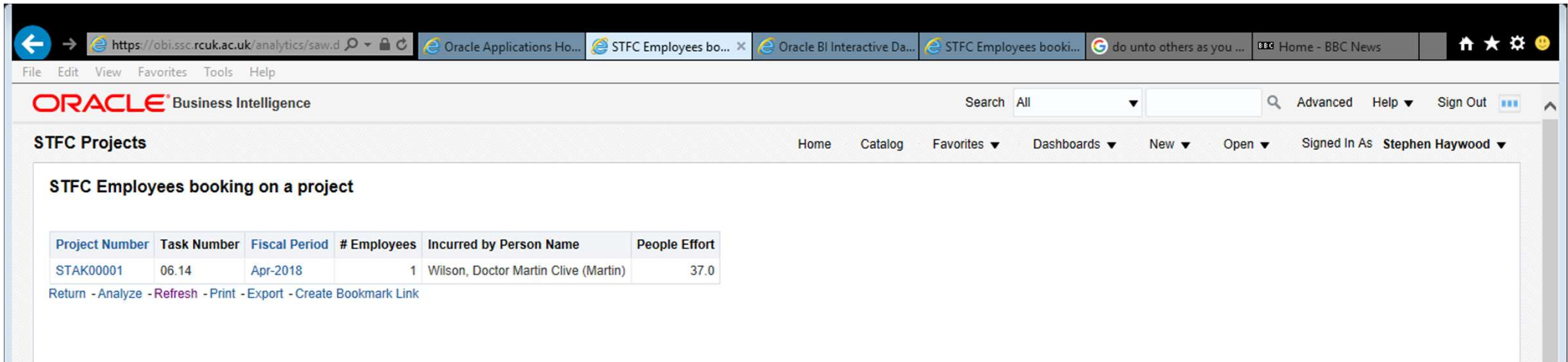
Select View Burdened

Project Number	Currency Code	Effort (Hrs)	Monthly FTE rate	Burdened People Cost	Apr-2018			May-2018			Jun-2018			Jul-2018			Aug-2018		
					Effort (Hrs)	Monthly FTE rate	Burdened People Cost	Effort (Hrs)	Monthly FTE rate	Burdened People Cost	Effort (Hrs)	Monthly FTE rate	Burdened People Cost	Effort (Hrs)	Monthly FTE rate	Burdened People Cost	Effort (Hrs)	Monthly FTE rate	Burdened People Cost
STAK00001	GBP	46.8	0.35	1,750.81	37.0	0.28	1,399.35	2.4	0.02	71.59				7.4	0.06	279.87			
STAK00001B	GBP	6,751.4	50.92	432,915.11	1,162.9	8.77	74,651.64	1,400.7	10.56	90,372.37	1,381.0	10.42	89,808.13	1,147.6	8.66	75,730.17	1,454.4	10.97	88,898.6
Grand Total		6,798.2	51.27	434,665.92	1,199.9	9.05	76,050.99	1,403.1	10.58	90,443.96	1,381.0	10.42	89,808.13	1,155.0	8.71	76,010.04	1,454.4	10.97	88,898.6

Project Number is equal to STAK00001, STAK00001B and Fiscal Year is equal to 2018 and People Effort is not null

Analyze - Refresh - Print - Export

## Oracle Time & Labour (OTL) – Bookings



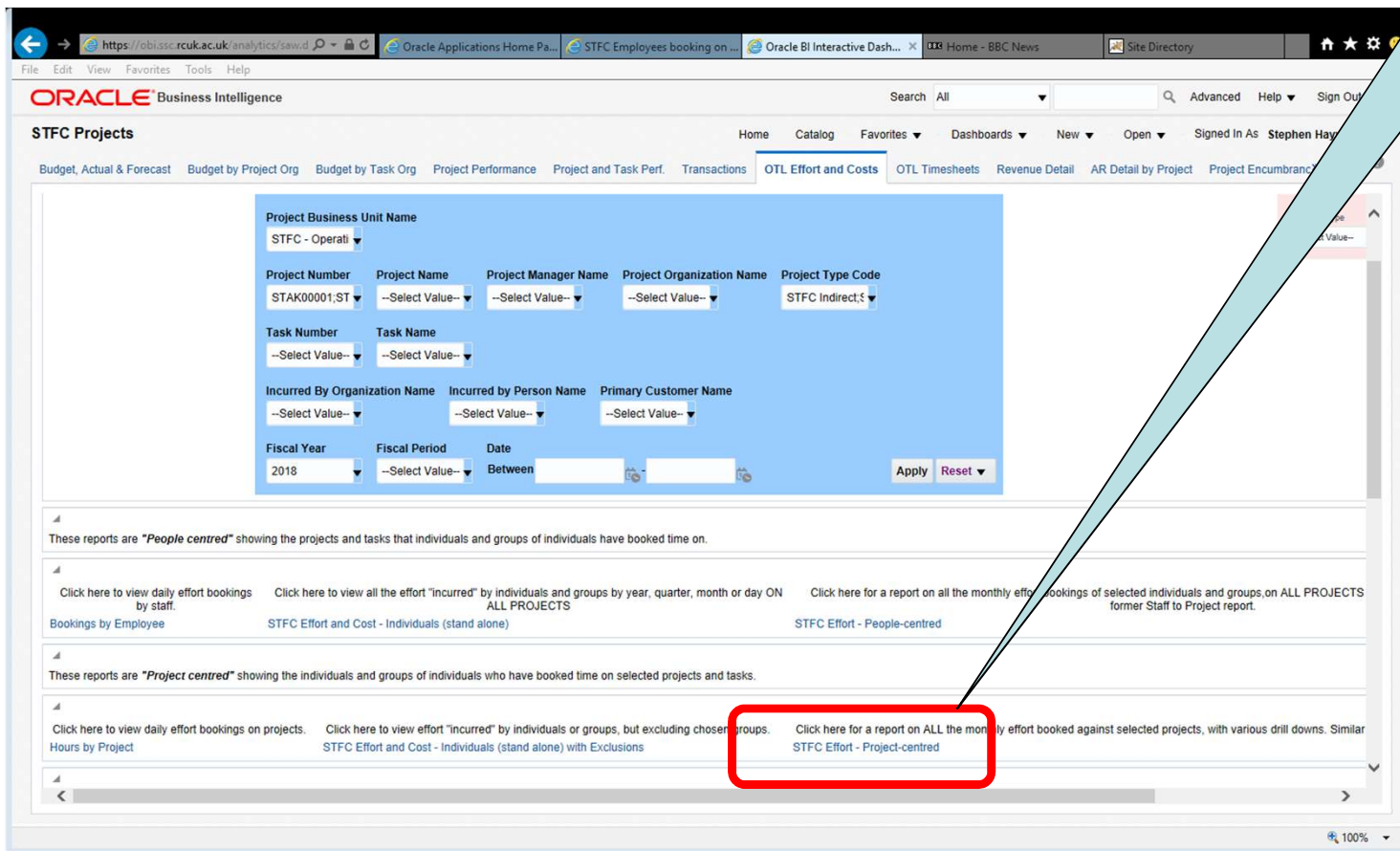
The screenshot displays the Oracle Business Intelligence (BI) interface. The browser address bar shows the URL <https://obi.ssc.rcuk.ac.uk/analytics/saw.d>. The Oracle BI logo and "Business Intelligence" text are visible at the top left. A search bar with "All" selected and a "Sign Out" button are at the top right. The main content area is titled "STFC Projects" and contains a sub-section "STFC Employees booking on a project". Below this is a table with the following data:

Project Number	Task Number	Fiscal Period	# Employees	Incurred by Person Name	People Effort
STAK00001	06.14	Apr-2018	1	Wilson, Doctor Martin Clive (Martin)	37.0

Below the table, there are navigation links: [Return](#) - [Analyze](#) - [Refresh](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#).



# Oracle Time & Labour (OTL) – Bookings



Oracle Business Intelligence

STFC Projects

OTL Effort and Costs

Project Business Unit Name  
STFC - Operati

Project Number Project Name Project Manager Name Project Organization Name Project Type Code  
STAK00001:ST --Select Value-- --Select Value-- --Select Value-- STFC Indirect,§

Task Number Task Name  
--Select Value-- --Select Value--

Incurred By Organization Name Incurred by Person Name Primary Customer Name  
--Select Value-- --Select Value-- --Select Value--

Fiscal Year Fiscal Period Date  
2018 --Select Value-- Between

Apply Reset

These reports are "People centred" showing the projects and tasks that individuals and groups of individuals have booked time on.

Click here to view daily effort bookings by staff. Click here to view all the effort "incurred" by individuals and groups by year, quarter, month or day ON ALL PROJECTS. Click here for a report on all the monthly effort bookings of selected individuals and groups, on ALL PROJECTS former Staff to Project report.

Bookings by Employee STFC Effort and Cost - Individuals (stand alone) STFC Effort - People-centred

These reports are "Project centred" showing the individuals and groups of individuals who have booked time on selected projects and tasks.

Click here to view daily effort bookings on projects. Click here to view effort "incurred" by individuals or groups, but excluding chosen groups. Click here for a report on ALL the monthly effort booked against selected projects, with various drill downs. Similar STFC Effort - Project-centred

Click **STFC Effort – Project-centred** to get all details



## Oracle Time & Labour (OTL) – Bookings

STFC Effort - Project-centred - Internet Explorer

https://obi.ssc.rcuk.ac.uk/analytics/saw.dll?Go&Path=%2Fshared%2FSTFC%20Shared%2FProjects%2FSTFC%20Effort%20-%20Project-centred&Style=Alta&Done=Close&Action=Prompt&ViewState=c6697k9djt2nfs1io32v4t8lkq&P16=NavRuleDefault&NavFromViewID=d%3Ada

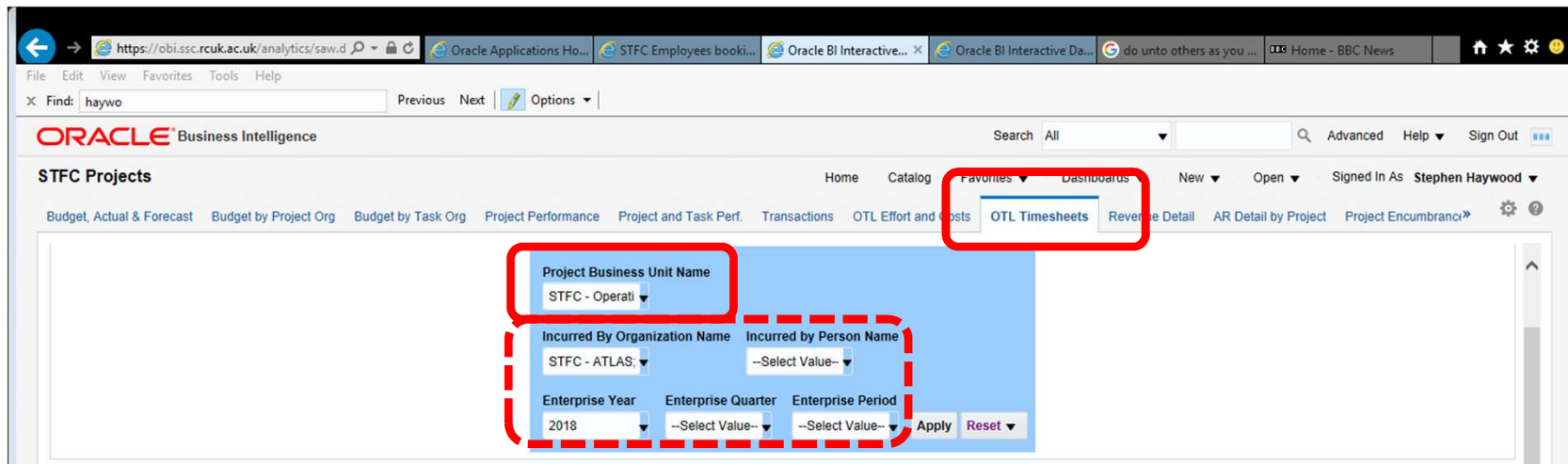
**Effort booked against projects and tasks**  
Use the Prompt to select projects/tasks for the report. It will report ALL the bookings on those projects in the month the work was done i.e. the "Enterprise period" not the "Fiscal period".

Select View Pivot Table ▼

Project Number	Task Number	Incurred by Person Name	Effort (Hrs)	Effort (Hrs)															
				Apr-2018	May-2017	May-2018	Jun-2017	Jun-2018	Jul-2017	Jul-2018	Aug-2017	Aug-2018	Sep-2017	Sep-2018	Oct-2017	Nov-2017	Dec-2017	Jan-2018	Feb-2018
STAA00010	01	Davies, Doctor John Keith (John)	2.0			2.0													
STAA00010	01	Lightbown, Mr Nigel David (Nigel)	1.4			1.4													
STAE00010C	01	Watts, Miss Carol Dawn (Carol Watts)	501.8	133.5		120.3		39.8		208.3									
STAE00018	01.01.02	Wilson, Ms Alexandra Edith (Sandi)	117.2	17.0		36.7		29.5		6.0		26.0							2.0
STAH00006	01.02	Lunney, Mr David William (David)	10.0	10.0															
STAH00007	01.02	Pinning, Doctor Robin Lee	7.4			7.4													
STAK00001	06.06	Landowski, Mr Brian Adrian (Brian)	7.4							7.4									
STAK00001	06.06	Rolfe, Mr Graham David (Graham)	2.4			2.4													
STAK00001	06.14	Wilson, Doctor Martin Clive (Martin)	37.0	37.0															
STAK00001B	01.04	Brawn, Doctor Ian Paul (Ian)	3.7	3.7															
STAK00001B	01.04	Church, Mr Ivan Timothy (Ivan)	1.0	1.0															
STAK00001B	07.01.01	Church, Mr Ivan Timothy (Ivan)	507.6	132.2		103.6		51.8		134.9		85.1							
STAK00001B	07.01.01	Lipp, Mr John David (John)	123.0	16.5		25.6		62.9		18.0									
STAK00001B	07.01.02	Brixey, Mr Peter	3.7			3.7													
STAK00001B	07.03.01	Booker, Mr Paul (Paul)	247.9	51.8		70.3		14.8		103.6		7.4							

## Oracle Time & Labour (OTL) – Timesheets

Select **OTL Effort and Costs** tab and STFC Operations.  
Then select **Organisation Name**, **Person** or **Year**.



The screenshot displays the Oracle Business Intelligence interface for STFC Projects. The 'OTL Timesheets' tab is selected, highlighted with a red box. Below the navigation bar, a filter panel is visible with the following settings:

- Project Business Unit Name:** STFC - Operati (highlighted with a red box)
- Incurred By Organization Name:** STFC - ATLAS
- Incurred by Person Name:** --Select Value--
- Enterprise Year:** 2018
- Enterprise Quarter:** --Select Value--
- Enterprise Period:** --Select Value--

Buttons for 'Apply' and 'Reset' are located at the bottom right of the filter panel.

## Oracle Time & Labour (OTL) – Timesheets

By week:

- **Red:** missing
- **Green:** fully booked
- **Orange:** overbooked ... but many people automated monthly and get whole month's booking in one week

**Missing Timesheets**  
Weeks of bookings in a selected period. Click on a name to see their bookings. Click on a week number to see the corresponding dates.

Incurred By Organization Name	Incurred by Person Name	Effort (Weeks)	Effort (Weeks)																					
			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
STFC - ATLAS	Byrne, Ms Sarah Rebecca	8.00	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	
	Spiedel Johnson, Miss Leah	8.00	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	
	Zhang, Doctor Zhige	22.00	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	
STFC - ATLAS Physics	Neophytou, Ms Nicola Louise	8.00	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	
	Wielers, Doctor Monika Bernardine (Monika)	22.00	Red	Orange	Red	Red	Orange	Red	Red	Red	Orange	Red	Red	Red	Orange	Red	Red	Red	Red	Orange	Red	Red	Red	
STFC - ATLAS Tracking	Adye, Doctor Timothy John (Tim)	22.00	Red	Orange	Red	Red	Orange	Red	Red	Orange	Red	Red	Red	Orange	Red	Red	Red	Orange	Red	Red	Orange	Red	Red	
	Dopke, Doctor Jens	22.00	Red	Orange	Red	Red	Orange	Red	Red	Orange	Red	Red	Red	Orange	Red	Red	Red	Orange	Red	Red	Orange	Red	Red	
	Gallop, Doctor Bruce Joseph (Bruce)	22.00	Red	Orange	Red	Red	Orange	Red	Red	Orange	Red	Red	Red	Orange	Red	Red	Red	Orange	Red	Red	Orange	Red	Red	
	Jones, Mr Lewis Dominic	8.00	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	



## Contacts

Any help with reports : [steph.rankin@stfc.ac.uk](mailto:steph.rankin@stfc.ac.uk).  
01235 567247





# Questions?

