EBI: Tips and Frequently Asked Questions (FAQs)

Tips

- You can have multiple instances of EBI open in your browser and run reports simultaneously. For example, you can have one tab of your browser running the Budget Position Summary & Detail Report and a second tab of your browser running the Labor Transaction Detail Report.

- When entering prompts, select the smallest piece of data you are looking for and set all other prompts to “All Column Values.” For example, if you only need to see results for a Project ID, use the Project Prompt and set all other prompts to “All Column Values.” You do not need to select a Department or Operating Unit to see transactions for that Project ID.

Frequently Asked Questions

Q: What browser should I use for EBI?

A: Mozilla Firefox is the preferred browser for EBI. If you are using a different browser and EBI is not working properly, try opening EBI in Firefox and running the report again.

Q: Can I use the browser’s back arrow in EBI?

A: Yes. Unlike Compass, it is okay to use the browser’s back arrow to navigate within the EBI tool.

Q: How many rows of data can I see on a dashboard?

A: Up to 300K rows of data can be viewed on a dashboard. Only 30 rows are shown by default, but you can view additional rows by clicking on the double-sided arrow at the bottom of that section. This expands that section to show all rows, up to 300K. If there are more than 300K rows of data for the prompts selected, you will receive an error message and will need to choose more restrictive criteria.

Q: How many rows of data can I export?

A: Up to 100K rows of data can be exported at once. Excel should be used for smaller amounts of data. It is recommended that you export to CSV for more than 10K rows of data.

Q: How is an export to CSV different from an export to Excel?

A: When you export to CSV, the data loses formatting. For example, leading zeroes are removed, so Project ID “00000754” would export as “754.” The data can be re-formatted once in Excel.

Q: What is the difference between Report views and the Table view?

A: Report views typically do not include all columns available in the default views. These columns are typically excluded but can be included by users to create customizations. The Table view will show all available columns and can be useful when exporting data.

Q: What is the Advanced Prompt section?

A: The Advanced Prompt section contains alternate trees or hierarchies and other secondary prompts that MOST users will not need. The prompts in the Advanced Prompt section will override the prompts in the primary Prompt section when they are for the same data. For example, if you select Fund in the primary Prompt section and Fund in the Advanced Prompt section, the selection in the Advanced section will determine the results displayed.

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Q: Can I use mid-month dates as my reporting date or as-of date?

A: Yes. You can use mid-month dates, but the data returned will include all transactions for the entire accounting period. Reporting dates are based on the accounting period and fiscal year. For example, if you enter 10/15/2017 you will get results for all of accounting period 2.

Q: What is the difference between exporting from the Page Options menu and the Export link?

A: Exporting at the Page Options menu gives you the option to export either the Current Dashboard Page or the Entire Dashboard, which exports all expanded section on that page or dashboard. The Export link will only export the results from that specific section.

More Information:

For additional assistance, please contact the Analytics & Reporting team via the **Finance Support Center**. Choose **Emory Business Intelligence (EBI)/Reporting** as your ticket category.