



The State University  
of New York

# BI Finance General How-to Dashboard Training

**April 2020**

**SUNY System Administration**

**Albany, NY**

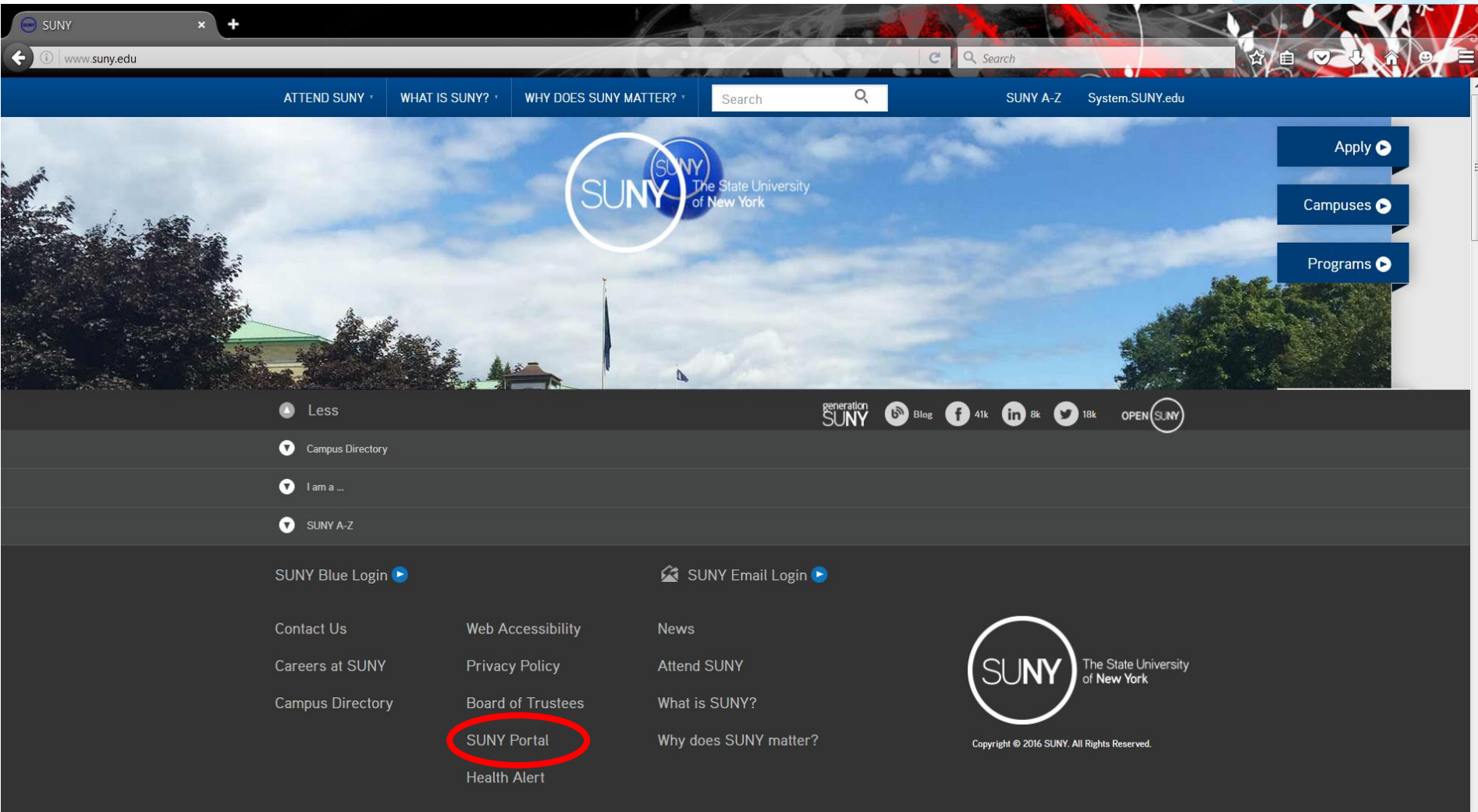
**Stephanie Raven & Kari Coleman**



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# How to Sign-in to BI

# Sign-on to BI



The screenshot shows the SUNY website homepage. At the top, there is a navigation bar with links for 'ATTEND SUNY', 'WHAT IS SUNY?', and 'WHY DOES SUNY MATTER?'. A search bar is also present. Below the navigation bar is a large banner image of a campus scene with the SUNY logo overlaid. On the right side of the banner, there are three buttons: 'Apply', 'Campuses', and 'Programs'. Below the banner is a dark grey footer area containing various links and social media icons. The 'SUNY Portal' link is circled in red.

generation SUNY

Blog 41k 8k 18k OPEN SUNY

Less

Campus Directory

I am a ...

SUNY A-Z

SUNY Blue Login

SUNY Email Login

Contact Us

Careers at SUNY

Campus Directory

Web Accessibility

Privacy Policy

Board of Trustees

**SUNY Portal**

Health Alert

News

Attend SUNY

What is SUNY?

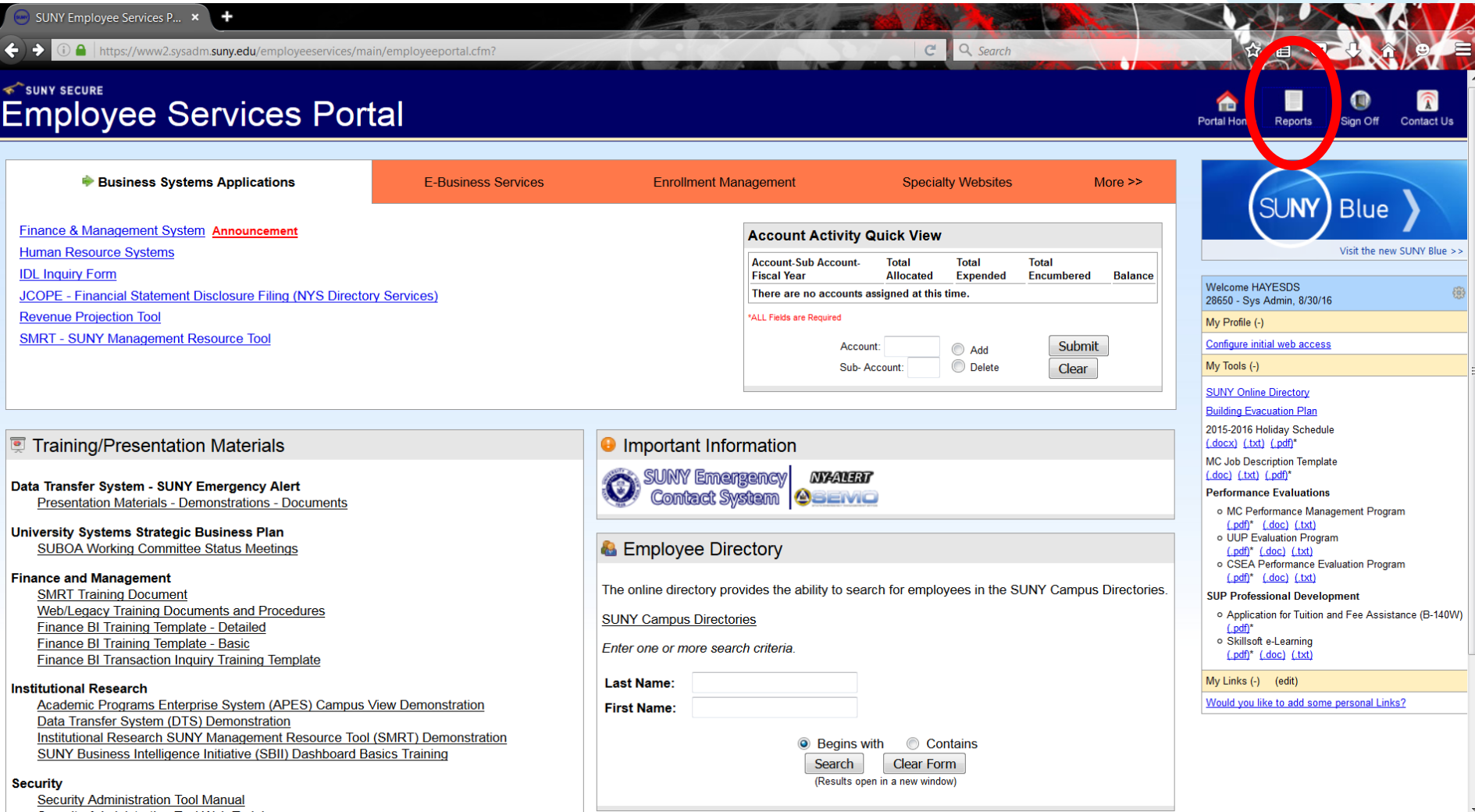
Why does SUNY matter?

SUNY The State University of New York

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Click on 'SUNY Portal'

# Sign-on to BI, con't



SUNY Employee Services P... x +

https://www2.sysadm.suny.edu/employeeservices/main/employeeportal.cfm?

SUNY SECURE

## Employee Services Portal

Portal Home Reports Sign Off Contact Us

**Business Systems Applications**

E-Business Services Enrollment Management Specialty Websites More >>

[Finance & Management System](#) [Announcement](#)

[Human Resource Systems](#)

[IDL Inquiry Form](#)

[JCOPE - Financial Statement Disclosure Filing \(NYS Directory Services\)](#)

[Revenue Projection Tool](#)

[SMRT - SUNY Management Resource Tool](#)

**Account Activity Quick View**

Account-Sub Fiscal Year	Account-Total Allocated	Total Expended	Total Encumbered	Balance
There are no accounts assigned at this time.				

\*ALL Fields are Required

Account:   Add

Sub-Account:   Delete

**Training/Presentation Materials**

**Data Transfer System - SUNY Emergency Alert**  
[Presentation Materials - Demonstrations - Documents](#)




**University Systems Strategic Business Plan**  
[SUBOA Working Committee Status Meetings](#)

**Finance and Management**  
[SMRT Training Document](#)  
[Web/Legacy Training Documents and Procedures](#)  
[Finance BI Training Template - Detailed](#)  
[Finance BI Training Template - Basic](#)  
[Finance BI Transaction Inquiry Training Template](#)

**Institutional Research**  
[Academic Programs Enterprise System \(APES\) Campus View Demonstration](#)  
[Data Transfer System \(DTS\) Demonstration](#)  
[Institutional Research SUNY Management Resource Tool \(SMRT\) Demonstration](#)  
[SUNY Business Intelligence Initiative \(SBII\) Dashboard Basics Training](#)

**Security**  
[Security Administration Tool Manual](#)  
[Security Administration Tool Web Training](#)

**Important Information**

 **SUNY Emergency Contact System**  

**Employee Directory**

The online directory provides the ability to search for employees in the SUNY Campus Directories.

[SUNY Campus Directories](#)

Enter one or more search criteria.

Last Name:

First Name:

Begins with  Contains

(Results open in a new window)

**SUNY Blue**

Visit the new SUNY Blue >>

Welcome HAYESDS  
28650 - Sys Admin, 8/30/16

**My Profile (-)**  
[Configure initial web access](#)

**My Tools (-)**

[SUNY Online Directory](#)  
[Building Evacuation Plan](#)  
2015-2016 Holiday Schedule  
[\(docx\)](#) [\(txt\)](#) [\(pdf\)](#)  
MC Job Description Template  
[\(doc\)](#) [\(txt\)](#) [\(pdf\)](#)

**Performance Evaluations**

- MC Performance Management Program  
[\(pdf\)](#) [\(doc\)](#) [\(txt\)](#)
- UUP Evaluation Program  
[\(pdf\)](#) [\(doc\)](#) [\(txt\)](#)
- CSEA Performance Evaluation Program  
[\(pdf\)](#) [\(doc\)](#) [\(txt\)](#)

**SUP Professional Development**

- Application for Tuition and Fee Assistance (B-140W)  
[\(pdf\)](#)
- Skillssoft e-Learning  
[\(pdf\)](#) [\(doc\)](#) [\(txt\)](#)

**My Links (-) (edit)**  
[Would you like to add some personal Links?](#)

Click on 'Reports' near top right

**SUNY SECURE**  
**SMaRT**  
SUNY Management Advanced Resource Tools

Portal Home Sign Off Contact Us

**S M a R T LIVE!**

Business Intelligence Transition Notice

### Business Intelligence

#### SUNY Business Intelligence Initiative (SBII)

Our Mission is to facilitate strategic and operational decision-making at the campuses and System Administration by making information available in a timely, consistent and mission-driven manner. This is accomplished through excellence in business intelligence practices, striving to be a leader among higher education institutions.

**Vision**  
The SUNY Business Intelligence Initiative (SBII) works to create an atmosphere where decision makers at all levels, including front-line academic units to senior management, are empowered with the information they need to analyze and manage their administrative tasks related to information.

The SUNY Business Intelligence Initiative (SBII) serves as a knowledge resource in the areas of data warehousing and business intelligence for the University. We maintain knowledge of trends and new techniques to adapt the best of these for the University environment.

**Navigation:** [Dashboards](#) [Training & Getting Started Guide](#) [SBII Community Space](#)

**What's Coming**

**SBII**  
New Business Intelligence(BI) Dashboards have replaced IR SMRT reporting tool and IR Discoverer Viewer Reporting.  
IR SMRT and IR Discoverer Viewer reports will be removed from service on December 1, 2009.

**SMaRT Live**

- Educational Outcomes and Performance Measures
- Employees
- Applications for Admission
- Facilities
- Research
- Philanthropy

**SMaRT Portal Feedback**  
We value your opinions and welcome your feedback. Let us know if you have any questions, comments or suggestions about the SMaRT Portal. We appreciate your input and look forward to hearing from you.

**Publications**

**SUNY Emergency Management**

- » Campus Comprehensive Emergency Management Plan [\(.pdf\)](#) [\(.doc\)](#) [\(.txt\)](#)

**SUNY Publications**

- » [Achieving Efficiency at The State University of New York](#) [\(.pdf\)](#)
- » [Mission Review II \(2005-2010\)](#) [\(.pdf\)](#) [\(.txt\)](#)
- » [2004-2008 Master Plan](#) [\(.pdf\)](#) [\(.txt\)](#)
- » [2006 Legislative Update](#) [\(.pdf\)](#) [\(.txt\)](#)
- » [2015 Annual Financial Report](#) [\(.pdf\)](#) [\(.txt\)](#)
- » [2009 Annual Financial Report](#) [\(.pdf\)](#) [\(.txt\)](#)
- » [2008 Annual Financial Report](#) [\(.pdf\)](#) [\(.txt\)](#)

**Office of the University Controller/  
Office of Finance and Business**

- » [Fiscal Year Calendar](#) [\(.pdf\)](#) [\(.txt\)](#)
- » [Operating Budget Manual](#) [\(.pdf\)](#) [\(.txt\)](#)

**SMaRT Portal Feedback**

NOTE: You need to have [Adobe Acrobat Reader](#) (free software) in order to view and print PDF files.

Click 'Dashboard' button

# Sign-on to BI, con't

Or set up a bookmark:

[suny.edu/analytics](https://suny.edu/analytics)



SUNY



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# Overview: BI – Finance Dashboards



# Available BI - Finance Dashboards

Home | Catalog | Favorites ▾ | Dashboards ▾ | New ✦ | Signed In As COLEMAKA-System\_A

- ▾ **Course Tracking**
- > **Course**
- > **Degree**
- > **Enrollment**
- > **Financial Aid**
- ▾ **Financials**
  - Account Summary
  - Budget
  - Cash Reporting
  - CF Project Analysis
  - Emergency Reporting
  - End of Month
  - Expenditures and Disbursements
  - General Ledger
  - IFR Cash
  - Management Summary
  - P-Card POS
  - Payroll
  - Procurement
  - Projection Summary Reporting
  - Property Control
  - Reference
  - Transaction Inquiry
  - Trends
  - Two Year Expend Comparisons
  - URAS
  - Voucher Inquiry
- > **Human Resources**

Account Summary - Introduction  
Open | More ▾

Reference - Training  
Open | More ▾

Find Cash Balance by Campus  
Open | Edit | More ▾

will be displayed here when results





# BI-Finance Dashboards Access on Home Page

The screenshot displays the BI-Finance Home Page interface. At the top, a navigation bar includes links for Home, Catalog, Favorites, Dashboards, New, and Signed In As COLEMAKA-System\_Admin. A My Account link is also visible in the top right corner. The main content area is divided into sections: Recent Dashboards, More Dashboards, and Others. The Recent Dashboards section lists several Account Summary dashboards. The Others section includes PO Summary Daily count and End Cash Balance by Campus. A Most Popular section is also present, but it currently shows no recommendations.

Home | Catalog | Favorites | **Dashboards** | New | Signed In As COLEMAKA-System\_Admin | My Account

**Recent**

**Dashboards**

- Account Summary - Account S...  
Open | More
- Account Summary - Introduction  
Open | More
- Account Summary - All Alloc/E...  
Open | More
- Account Summary - Pending E...  
Open | More
- Account Summary - Actual Allo...  
Open | More
- Account Summary - Payroll Se...  
Open | More

**More Dashboards**

**Others**

- PO Summary Daily count 2-14-...  
Open | Edit | More
- End Cash Balance by Campus  
Open | Edit | More

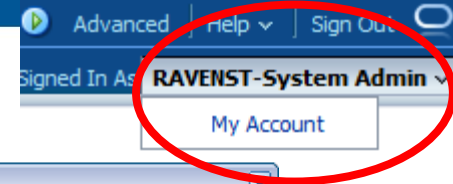
**Most Popular**

No recommendations are currently available. Most Popular items will be displayed here when results become available.

Download BI Desktop Tools

**BI Home Page:**  
Home, Dashboards, My Account, Recent, and Most Popular

# BI-Finance Dashboards Access on Home Page



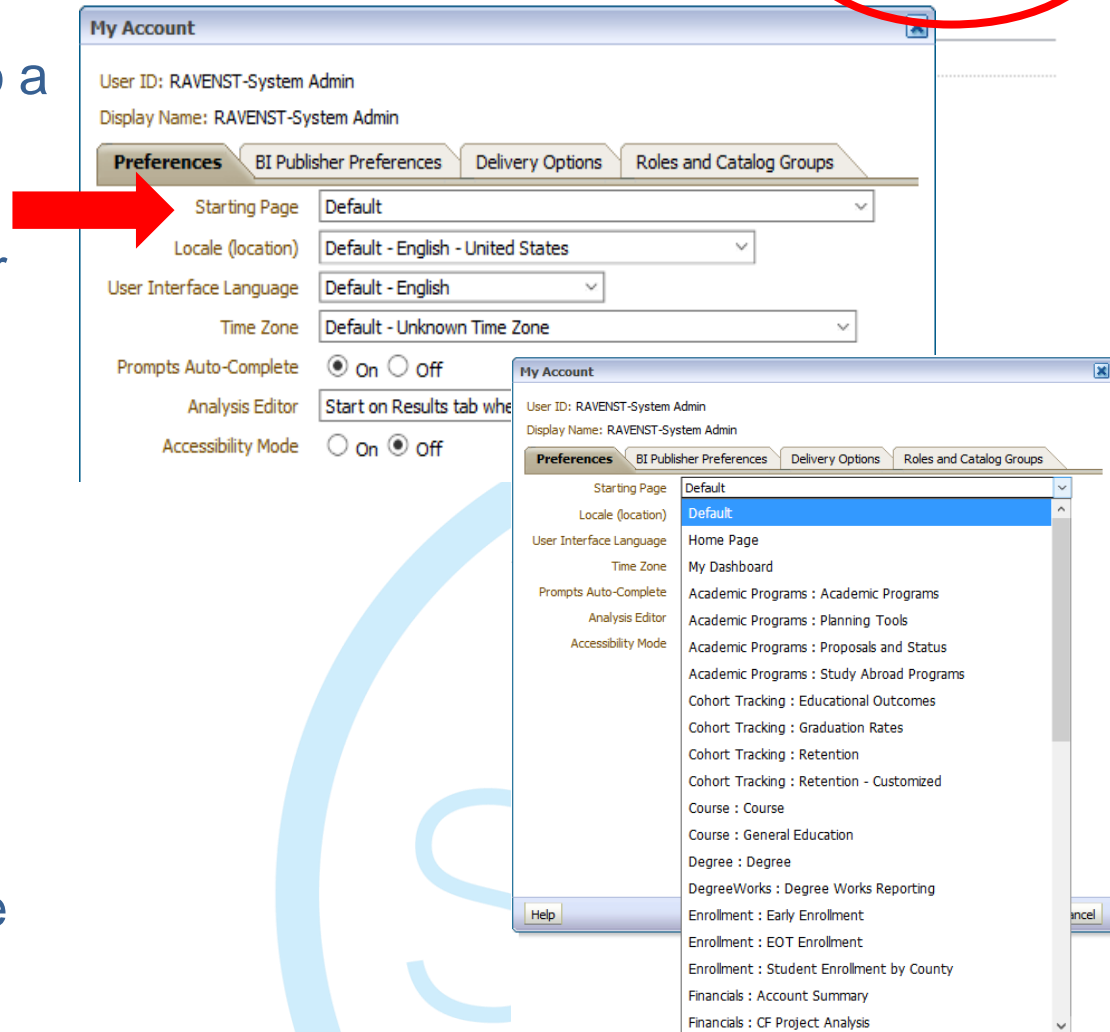
When logging into BI the default start page is your home page, to change your default start page to a frequently used dashboard:

1. Top right corner, click your user ID>My Account

2. In the My Account dialog box> preferences tab> Starting page drop down you can select your preferred start page

3. Click 'ok'

4. When you launch BI, this page will open first



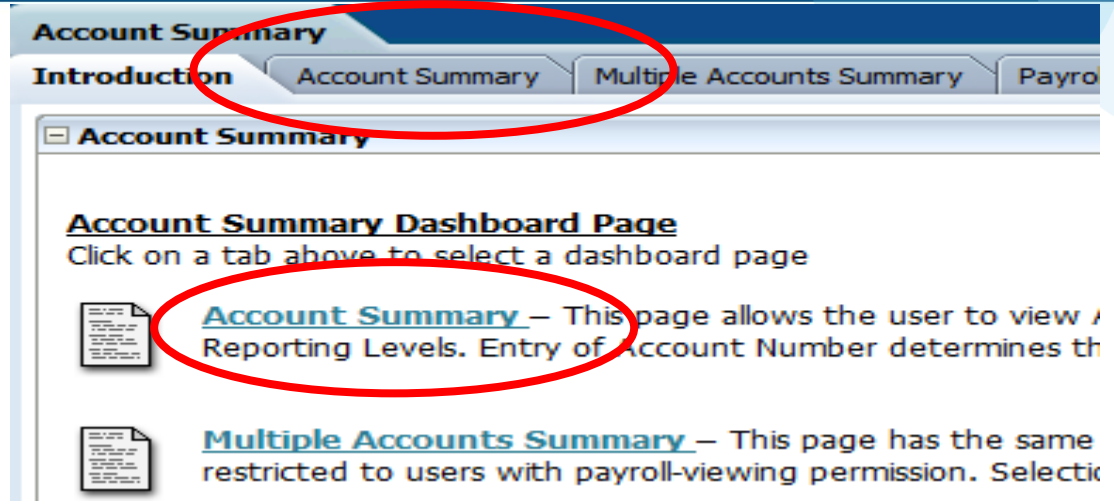


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# **Overview: Account Summary/ General Dashboard How-to**

# Account Summary/ General Dashboard How-to

- Click on the Tab or Link to dashboard page you would like to use.

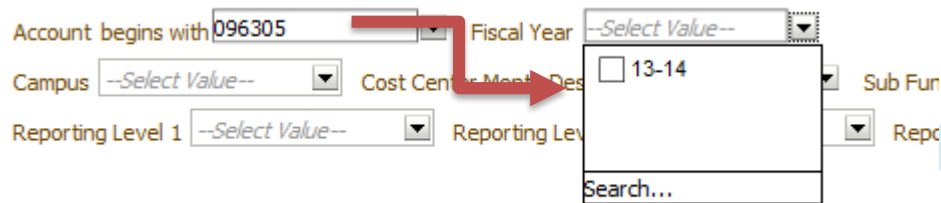


- Defaults are set to account "000000" so the query doesn't run when it is first opened and fiscal year
  - Be sure to delete or change the default account "000000" to run query
- Selection fields are case sensitive
- Must always click "Apply" to run query

# Account Summary/ General Dashboard How-to

- Account Number, Fiscal Year and Campus fields are “linked” selections, once you input into one of these fields the other fields will filter for the applicable attributes that relate to the original field input.

For example, when there is no account indicated all fiscal years are available to select, but when you add an account that is only related to FY 13-14, only that FY is available to select.



Account begins with 096305 Fiscal Year --Select Value--  
 Campus --Select Value-- Cost Center Month Desc 13-14 Sub Fun  
 Reporting Level 1 --Select Value-- Reporting Lev Search...

- To Select “all” items in a selection, leave the field blank. For example if you want every account within the Revenue Offset fund, leave the account field blank (i.e., “--Select Value—“)



Account begins with --Select Value-- Fiscal Year --Select Value--  
 Campus --Select Value-- Cost Center Month Desc --Select Value-- Sub Fund Group Revenue Offset  
 Reporting Level 1 --Select Value-- Reporting Level 2 --Select Value-- Reporting Level 3 --Select Value--



# Account Summary/ General Dashboard How-to

- Input appropriate selection criteria based on the query you want to run.
  - This example: Account 900837, Fiscal Year 19-20
- Click “Apply”, results will display below.

Account	Account Local Desc	Cost Center	Account Manager
900837-99	COMPUTER CENTER STRATEGIC PLAN	28-777908-OR-19	
	ECATALOG	28-328288-OR-19	
	GENERAL CAMPUS EQUIP OP ACCT	28-324242-OR-19	VP Administration & Finance
	PARKING GARAGE	28-665656-OR-19	

[Analyze](#) - [Refresh](#) - [Print](#) - [Export](#)

Year	Beginning Cash Balance (+)	Prior Yr Disbursements (-)	Prior Yr Encumbrances (-)	Adjusted Beg Cash	Revenue (+)	Fringe & O/H Assessments (-)	Expenditures (-)	Ending Cash Balance (+)	Encumbrances (-)	Fringe & O/H Encumbrances (-)	Cash Bal less Encumbr (-)
0	559,209.32	3,233.24	0.00	555,976.08	472,811.73	82,432.08	180,791.91	765,563.82	51,955.84	0.00	713,607.98

[Analyze](#) - [Refresh](#) - [Print](#) - [Export](#)

Fiscal Year	Assessments	Rate	Expenditure	Encumbrance	Total
19-20	Administrative O/H	6.00%	29,919.45	0.00	29,919.45
	Fringe Benefits	38.74%	52,512.63	0.00	52,512.63
	Maintenance O/H	0.00%	0.00	0.00	0.00
<b>19-20 Total</b>			<b>82,432.08</b>	<b>0.00</b>	<b>82,432.08</b>
<b>Grand Total</b>			<b>82,432.08</b>	<b>0.00</b>	<b>82,432.08</b>

[Analyze](#) - [Refresh](#) - [Print](#) - [Export](#)

Select View:  ▾

Charge Agency Name	Fiscal Year	Major Object	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used	
<b>Grand Total</b>			<b>207,202.00</b>	<b>180,547.46</b>	<b>244.45</b>	<b>7,995.00</b>	<b>43,960.84</b>	<b>-25,545.75</b>	<b>112.33</b>	
<b>System Admin Total</b>			<b>207,202.00</b>	<b>180,424.32</b>	<b>244.45</b>	<b>7,995.00</b>	<b>43,960.84</b>	<b>-25,422.61</b>	<b>112.27</b>	
System Admin	19-20	PSR	202,202.00	140,140.14	0.00	0.00	43,960.84	18,101.02	91.05	<span style="color: orange;">●</span>
		TS	5,000.00	0.00	0.00	0.00	0.00	5,000.00	0.00	<span style="color: green;">●</span>
		OTPS	0.00	40,284.18	244.45	7,995.00	0.00	-48,523.63		<span style="color: red;">●</span>
<b>U-Wide Programs Total</b>			<b>0.00</b>	<b>123.14</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>-123.14</b>		
U-Wide Programs	19-20	OTPS	0.00	123.14	0.00	0.00	0.00	-123.14		<span style="color: red;">●</span>

[Analyze](#) - [Refresh](#) - [Print](#) - [Export](#)

Account begins with **900837-99**  
 and Fiscal Year is equal to **19-20**  
 and ("Cost Center Time", "Cost Center Year 4" >= 2008) c

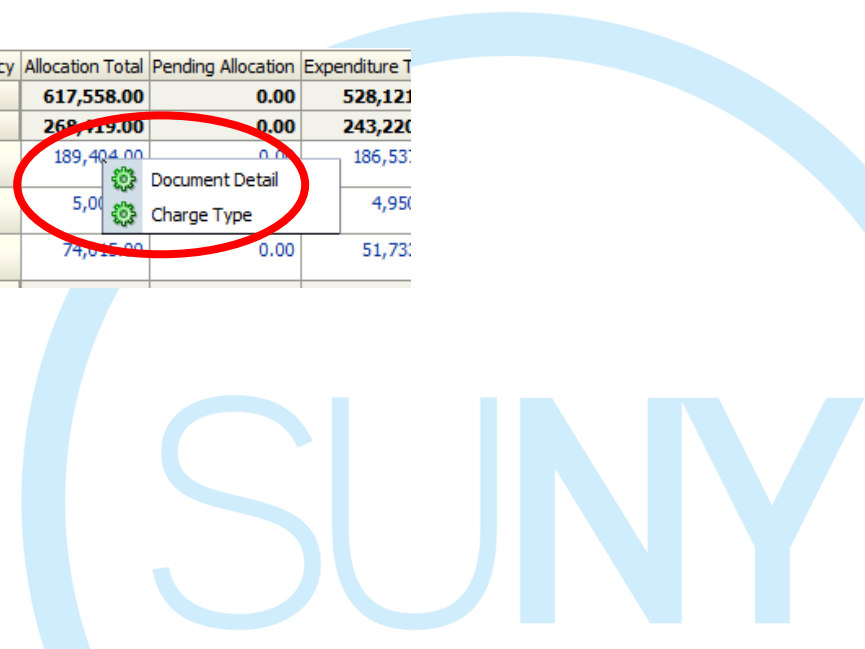


# Account Summary/ General Dashboard How-to

## Basic Dashboard Information:

- Maximum rows of data = 500,000
- Blue values = drillable for more detailed info

Charge Agency Name	Fiscal Year	Major Object	Originating Agency	Allocation Total	Pending Allocation	Expenditure T
<b>Grand Total</b>				<b>617,558.00</b>	<b>0.00</b>	<b>528,121</b>
<b>System Admin Total</b>				<b>268,719.00</b>	<b>0.00</b>	<b>243,220</b>
System Admin	16-17	PSR	System Admin	189,404.00	0.00	186,530
		TS	System Admin	5,000.00	0.00	4,950
		OTPS	System Admin	74,315.00	0.00	51,730



# Account Summary/ General Dashboard How-to

The user can include columns or exclude columns to customize their view.

## To include a column:

Right click on a column heading

Hover over the 'include column'

Click on the column you wish to include

The column will be added to the right of the column where you clicked

Object	Original	Allocation	Total	Expenditure Total	Pending Expen
			00	581,684.73	5,93
			00	44,233.00	
Cortlar			00	44,233.00	
			00	0.00	
Downs			00	0.00	
			00	0.00	
			00	0.00	
			00	0.00	
System					
System Admin		5,000.00	0		
System Admin		75,015.00	0		5,9
		349,139.00	0.00	284,901.02	

## To exclude a column

Right click on the column heading

Click on 'Exclude Column'



# Account Summary/ General Dashboard How-to

To move column click, hold, and drag to rearrange columns, section by attribute, or to create prompt

The blue highlight shows where the column is being moved to

Charge Agency Name	Fiscal Year	Major Object	Originating Agency
<b>Grand Total</b>			
<b>Cortland Total</b>			
Cortland	16-17	OTPS	Cortland
<b>Downstate Medical Total</b>			
Downstate Medical	16-17	OTPS	Downstate Medical

Charge Agency Name	Fiscal Year	Major Object	Originating Agency
<b>Grand Total</b>			
<b>Cortland Total</b>			
Cortland	16-17	OTPS	Cortland
<b>Downstate Medical Total</b>			
Downstate Medical	16-17	OTPS	Downstate Medical

Select View: Summary by N

Charge Agency Name	Fiscal Year	Major Object	Originating Agency	Allocation Total	Pending Allocation	Expenditure
<b>Sections</b>						
Cortland	16-17	OTPS	Cortland	1,101,550.00	0.00	781,000.00

Column moved to Pivot Table Prompt Area: creates a drop down box of the accounts

Charge Agency Name: Cortland

- Cortland
- Downstate Medical
- Empire State
- System Admin
- U-Wide Programs

begins with 900837  
is equal to 16-17

Column moved to Sections Area: creates separate displays by account

**Cortland**

Fiscal Year	Major Object	Originating Agency
16-17	OTPS	Cortland

**Downstate Medical**

Fiscal Year	Major Object	Originating Agency
16-17	OTPS	Downstate Medical

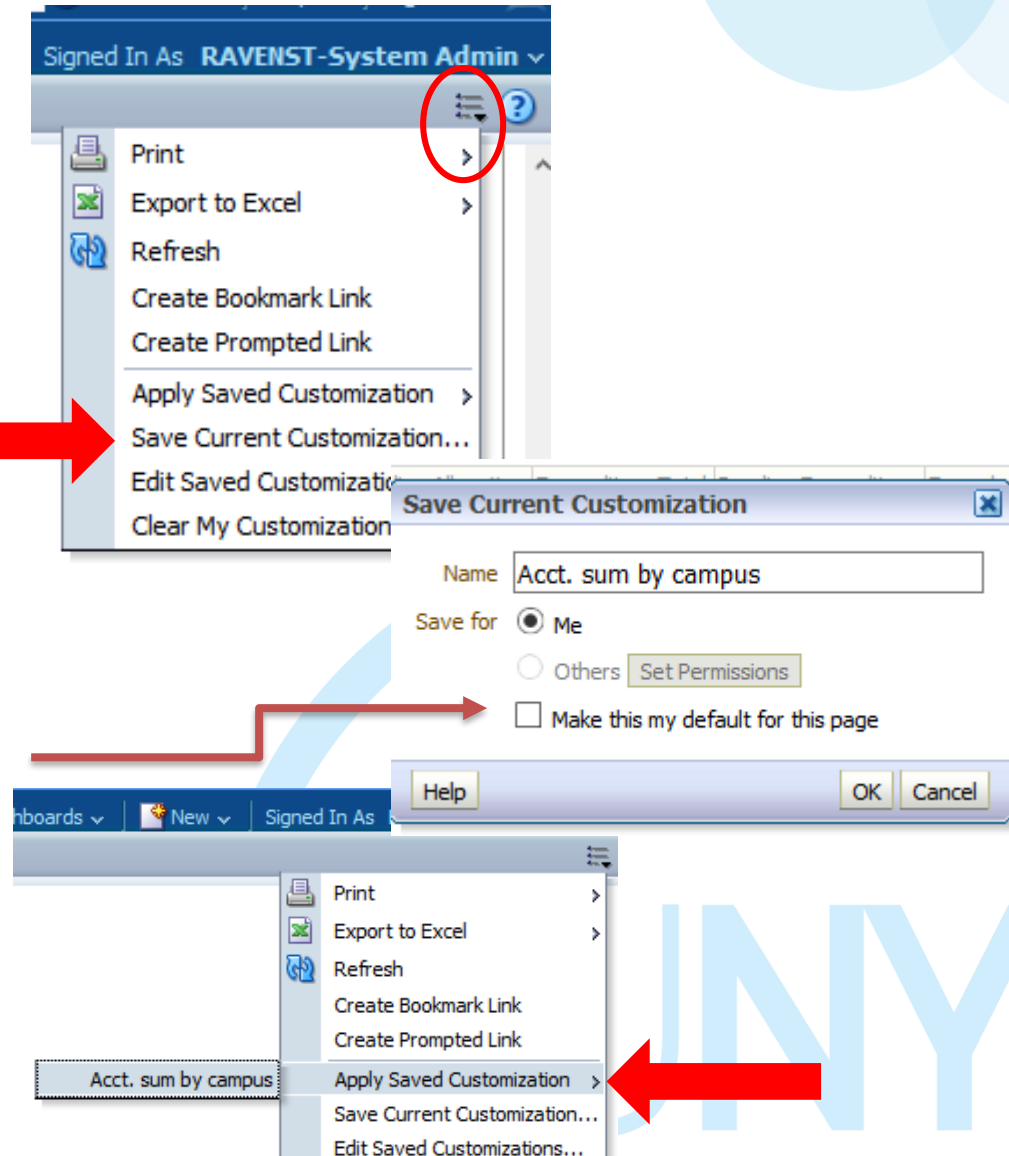
**Empire State**

Fiscal Year	Major Object	Originating Agency
16-17	OTPS	Empire State

# How to Save Customizations

When you have a customization format you use frequently, you can save it to apply in the future:

1. Top right corner, click on the three lines below your user id.
2. Click on “Save Current Customization”
3. Name the Customization, click ok  
You can also save as default customization for dashboard here
4. Or apply as needed next time you are on the dashboard page, click the three lines, click ‘Apply Saved Customization’, select from saved customizations you want to apply.



# BI Questions and Support

SUNY



If you have questions on how to use BI or notice a reporting error, please call/email Stephanie or Kari directly

Stephanie Raven

Tel: 518-320-1231

Email: [Stephanie.raven@suny.edu](mailto:Stephanie.raven@suny.edu)

Kari Coleman

Tel: 518-445-4128

Email: [Kari.coleman@suny.edu](mailto:Kari.coleman@suny.edu)

## Join our List Serve!

Get BI update notifications and Tips and Tricks

How to Join:

1. Email:

[LISTSERV@LS.SYSADM.SUNY.EDU](mailto:LISTSERV@LS.SYSADM.SUNY.EDU)

2. Do NOT write anything in subject line

3. Write “Subscribe SUNY-Finance-BI \*your name here\*” in email body

4. Wait be to approved

Thank you

SUNY