SUNY BI Documentation

Sign on instructions: Mozilla Firefox is the recommended browser.

Begin sign on from www.suny.edu/analytics via Mozilla Firefox.

OR Sign on with the following steps to see the training information on the SUNY Portal.

1. Begin sign on as you would for SMRT from www.suny.edu via Mozilla Firefox.

2. When you get to the Employees Services Portal, click on Reports in the upper right hand section.

3. Click on the Business Intelligence tab.

4. Click on Dashboards.

5. You now are in SUNY BI. Click on the dropdown on Dashboards on the blue menu at the top.

Stony Brook users with “Account Level” security should see these Financials dashboards:

1. Account Summary
2. Expenditure Inquiry
3. Management Summary
4. Reference
5. Transaction Inquiry
6. Payroll

Note that as additional dashboards are developed, this list will change.
Checking your account settings:

1. Hover over your name in the upper right hand corner and click on My Account.

2. During testing we have found that the program is more responsive on many of the dashboards if Auto-Complete is set to “Off”. In the Preferences tab, set Auto-Complete to “Off”.

3. The Roles and Catalog Groups tab shows your security profile and lists the dashboards you have access to. For access problems, you may be asked to send a screen shot to the security administrators.

4. Click OK if you made a change or Cancel to exit from My Account.
Accessing the Account Summary dashboard:

This dashboard displays summary information for one account or groups of account. Parameters selected will show at bottom of output.

- You can access data back to FY 08-09 for appropriated funds accounts.
- Data can be returned by Fund and/or Reporting Level (VP area.)

1. Click on the dropdown on Dashboards on the blue menu at the top.
2. Choose Account Summary under Financials.

3. **On the Introduction tab, you will see a list of Tips and Tricks, which are very helpful.**

4. Click on the Account Summary tab or the Account Summary link.

5. Remove 000000 from the “Account begins with” dropdown and input one of your account numbers in its place.

**NOTE:** Use the 6 digit account number unless you want to view a specific sub account, in which case you should enter 6 + 2 digits in the format 999999-99.

6. After inputting the account number, click the “Apply” button on the right. Your account information will be displayed. Note that totals are at the top of the output.

7. You may select data presentation in 1 of 3 views.

   - Summary by Major Object
   - Summary by Object
   - Summary by Detailed Object

8. You can print or export the data that is returned.

9. You can drill down on items that are displayed in **blue**.

Left click provides these choices:

- Document Detail
- Charge Type

Right click provides these choices:

- Action links
- Include column
- Show Running Sum
Accessing the Management Summary dashboard:

This dashboard group includes Management Summary and IFR Management Summary.

This dashboard displays summary information for groups of account. Parameters selected will show at bottom of output.

- You can access data back to FY 08-09 for appropriated funds accounts.
- Data can be returned by Fund and/or Reporting Level (VP area.)

Management Summary:

1. Click on the dropdown on Dashboards on the blue menu at the top.

2. Choose Management Summary under Financials.

3. Click on the Management Summary tab or the Management Summary link.

4. Remove XXXXX from the “Sub Fund Group” dropdown and select 1 or more Funds. **Note**: Choose Revenue Offset Fund for State operating accounts; prior to FY12-13, State Purpose Regular should be used.

5. You may select data presentation in 1 of 6 views. The “Rollup” views return 1 line for accounts that are subbed. Note the “Account Group” views which include the Account Group field in the report.

<table>
<thead>
<tr>
<th>Management Summary Including Pending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management Summary Without Pending Details</td>
</tr>
<tr>
<td>Management Summary Rollup Including Pending</td>
</tr>
<tr>
<td>Management Summary Rollup Without Pending Details</td>
</tr>
<tr>
<td><strong>Management Summary Account Group Including Pending</strong></td>
</tr>
<tr>
<td>Management Summary Account Group Without Pending Details</td>
</tr>
</tbody>
</table>

IFR Management Summary:

1. Click on the IFR Summary tab or the IFR Summary link.

2. Remove XXXXX from the “Sub Fund Group” dropdown and select 1 or more Funds. This report will return data for the following funds: General IFR, SUTRA, Dormitory Sponsored, Hospital Sponsored, and Stabilization Fund.

3. You may select data presentation in 1 of 2 views. The “Master” view doesn’t display sub accounts.

<table>
<thead>
<tr>
<th><strong>IFR Management Summary</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IFR Master Management Summary</strong></td>
</tr>
</tbody>
</table>

4. You can right click on any column heading and “Include column” for Account Group.
Management Summary - Account Group Information Display:

When you run the Management Summary with the Account Group displayed, the default settings in SUNY BI don’t repeat the Account Groups lines for each account and there are subtotals by Account Group.

In order to get the Account Group line to repeat for each account, do the following:

1. Select a View in which Account Group is not included.
2. Right click on “Account Local Desc” in column heading and choose “Include column > Account Group”.
3. If you also want the Account Group Description, right click on “Account Group” in column heading and choose “Include column > Account Group Desc”.

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[Table with Account Group information]

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[Table with Account Group information]