Business Intelligence (BI) has replaced SMRT for account viewing. The steps below show how to login to BI through the SUNY Portal.

You will only get information for accounts that you have access to.

**Getting to SUNY BI:**
Log on to SUNY employee portal through SUNY website - Click on reports

Click on Business Intelligence tab:

Click on Dashboards box:
To set-up access directly (one-click) to BI, on portal homepage click edit in “My Links”

Type the following address in URL: https://www.suny.edu/analytics/saw.dll?bieehome

Account Summary Dashboard

BI Homepage, will look different depending on your level of access.
For most users, the Account Summary will be the dashboard used. This dashboard is designed to “mimic” SMRT finance. To get to Account Summary Dashboard, click on Dashboard drop down menu: The click on “Account Summary”

Click on Account Summary tab:
Click in Account begins with box, the default is always all zeros. This keeps the system from searching for account data when you first open the page:

Type in 6 digit account code, if you are looking at an account with subs, you need to use the 8 digit codes as such: 900760-45, the “dash” must be included if you are looking at a sub account. Tab to Fiscal year, default is current year, but can be changed via drop-down (arrow).

Enter does not work in BI, must click “APPLY” button

Result from BI defaults to “SUMMARY OF MAJOR OBJECTS”
BI Dashboards

Drop down menu for “Select View” as three options
  1) Summary by Major Object (default)
  2) Summary by Object
  3) Summary by Detailed Object (most closely reflects look of SMRT)

Summary by Object

![Account Summary](image-url)
Summary by Detailed Object:

To look at expenditure detail, click on amount, menu will pop-up.
Document Detail: anytime lettering is in Blue, it is a drillable field.

Click on Procurement Number or Requisition Number, takes you to PO Summary in pop-up window.
BI Dashboards

Click on Document Number:

Get the Voucher Summary:
To return to previous page, always click return, do not use “back” button on browser.
Click on blue clickable number:

Results: can drill down on Document Number & Procurement Number from here as well:

To save information, you can use print
Or Export:

Several options exist for export including PDF, Excel (2003 or 2007), Powerpoint (2003 or 2007), data (includes CSV, Tab Delimited, or XML). If you would like to keep all formatting, use Excel, if you want data only, use CSV format:

Excel download:

CSV is data only, none of the above formatting
What if you only have one account and don’t want to have to go through the steps every time to access your account: once you’ve displayed your account the way you want to see it, click on box in right hand corner next to question mark:

Choose “Save Current Customization”
Name your customization in popup window and click “OK”

To open new customized page, go to account summary dashboard, click on customization toolbar. Then click on Apply Saved Customization / your customized dashboard

Your customized report will appear.

Other selections on selection box in Account Summary:
1) **Fiscal Year** – multiple years can be selected at the same time

2) **Campus** will always be Canton so can be left blank

3) **Cost Center Month Desc** - can choose a month end during the year to get a point-in-time snapshot for account

4) **Sub Fund Group** - can choose all accounts under a specific funding source (depends on your access)
   - Revenue Offset Fund – state operating accounts (prior to 2012, State Purpose Regular should be used)
   - General IFR – state IFR accounts
   - SUTRA – Summer accounts
   - Dormitory Operations – Res Hall accounts
   - Dormitory Sponsored – Res Hall IFR accounts
5) *Reporting Level 1* - can choose all accounts under a specific Vice President (depends on your access)

6) *Reporting Level 2* – can choose all accounts under a specific Director, AVP, or Dean (depends on your access)

7) *Reporting Level 3* – can choose all accounts under a specific Department (depends on your access)

8) *Reporting Level 4 & Reporting Level 5* - are currently not utilized
To utilize reporting level alone (no account), you can pull all accounts together in one report (summarize all accounts together). Account number must be blank so remove all zeros from account # or the query will not run. Choose the department under Reporting Level 3, you would like to see, then click “apply”.

Shows all accounts associated with department, summarizes IFR accounts separately and summarizes all expenditures, allocation, etc together:
Account can be added to the summarized display by clicking on the header. Click on “Include column” for the Account column to be added.
The Account Summary for IFRs

This Dashboard attempts to recreate the cash balance IFR pages in SMRT, although visually it is very different. Output is horizontal instead of vertical as in SMRT. This is a limitation of BI and cannot be changed.

There are timing differences between BI and SMRT, typically there is a day or two lag between SMRT and BI. Again, it’s a system limitation at the time. We are no longer able to view accounts in Real Time.
BI Dashboards

As you begin to use Business Intelligence, if you notice issues or problems with the data, please contact Office of Procurement & Travel Services, so System can be notified and corrective action can take place.

Tips & Tricks:

**Browser/Error Resolution**

- Firefox is the desired browser
- If BI stops working due to inactivity, hit F5 to refresh or click the clockwise circular arrow at the top of the screen
- If you are experiencing problems, clear your browser cache before you do anything else

**Editing**

- Click Return to get back to the previous page after you have drilled down. Don't use the back button
- Always use the 6 digit Account Number unless want to view a specific Sub Account, then enter 6 + 2 digits in format 999999-99
- It is not necessary to populate every parameter before clicking on Apply
- Hit Tab after entering or blanking out Account Number. This will populate the Fiscal Year and Campus fields for choices if necessary
- When drilling to details, you can drag a column (when getting crosshairs on top of column) to the top and create a section or pivot table
- You can save Prompt values by clicking on the 3-line icon to the left of the question mark and click Save Current Customization
- Click on the up/down arrow at the end of a list to return all rows

**Exporting**

- If you experience problems exporting to Excel 2007, export to Excel 2003
- When exporting, if you want values to populate on all rows then export to CSV not Excel
- You can export or print all sections of a dashboard page by clicking on the 3-line icon to the left of the question mark and clicking Print or Export