SUNY BUSINESS INTELLEGENCE DASHBOARDS

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

Employee S	ervices Portal			Portal Home	Reports	() Sign Off	Contact Us
✦Academic Services	Business Systems Applications	E-Business Services	Enrollment Management	More >>		VALDRUFF Inton, 7/3/17	۲
Data Transfer System (DTS)					-	nitial web acco	ess
Data Transfer System (DTS)	- NY-Alert				My Tools (-	-)	
Overseas Academic Program	Approval Process System				SUNY Onli	ne Directory	
					My Links (-) (edit)	
					BI Dashbor	ards	
Training/Presentation	on Materials	& Employee Direc	tory				

Click on Business Intelligence tab:

SUNY SECURE SMaRT SUNY Management Advance	ed Resource Tools	Portal Home Sign Off	Contact Us
SM	Fixed Ad Hoc Business Transition Reports Intelligence Notice		
	Fixed Reports Menu	Fixed Reports Details	
S T	(+) Expand All (-) Collapse All	Accounting Reports	
LIVE!	Accounting Reports (+)	SUNY CANTON	
EIVE:	Budget Reports (+)	:: Daily Batch Control List	
	Human Resources (+) IPEDS HR Reports (+)	This report name has no reports at this time.	
<u> </u>		:: CER Reports	Date

Click on Dashboards box:



To set-up access directly (one-click) to BI, on portal homepage click edit in "My Links"

SUNY SECURE Employee	Services Por	tal		Contal Home	Reports	() Sign Off	Contact Us
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Type the following address in URL: <u>https://www.suny.edu/analytics/saw.dll?bieehome</u>

SUNY SECURE	Personal Links Administration	
	🌏 Your Current Links:	👍 Add a New Link:
1	To delete a link, click the checkbox next to the link you would like to delete, and then click the "Delete" button.	URL:
	BI - https://www.suny.edu/analytics/saw.dll?bieehome	http://www.suny.edu/analytics
	HR portal - https://www2.sysadm.suny.edu/hrportal/	Displayed Description: BI
	Reports - https://www2.sysadm.suny.edu/distributionReports/ReportsDistribution.cfm2ShowAll=Yes	Add
	Delete	

Account Summary Dashboard

BI Homepage, will look different depending on your level of access.

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Introduction to Oracle BI	Most Popular		
Oracle BI EE Documentation Download BI Desktop Tools ~ Oracle BI Contents ~ Help Contents ~ Oracle Technology Network	Account Summary - Account S Open More v Payroll Transaction Summary-1 Open Edit More v	Accounting Journal - Expenditu Open Edit More ~ Accounting Journal - Pending Open Edit More ~	Account Summary - Introduction Open More v Management Summary - Intro Open More v

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 <u>Dashboard drop down menu</u>: The click on "<u>Account Summary</u>"

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Click on Account Summary tab:

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	Search - This page is restricted to users with payroll-viewing permission. It allows the user to view Payroll information by Account and Fiscal Year. Selectic Subobject and Reporting Levels.	ons can also be m	nade by Campus, Line Nu	mber, Employe	e Name, Pay Per	riod, Payroll	
Open PC	215 – This page allows the user to view Open PO's. Selections are provided by Account Number, Fiscal year and Campus.						
	<u>Illoc/Exp/Enc</u> -This page allows the user to view Actual Transactions by Transaction Category (Allocations, Expenditures, and Encumbrances). Selections on Date range, Charge Type, Sub Fund Group, Subobject Range, Sub Object Group, Vendor Name, Transaction Description, Transaction Code, Document						
Pending Pending	Alloc/Exp/Enc - This page allows the user to view Pending Transactions by Transaction Category (Allocations, Expenditures, and Encumbrances). Select Transaction Date range, Charge Type, Sub Fund Group, Subobject range, Object levels, Pending Vendor Description, Transaction Code, Pending Procurem	tions are provideo ent Number and F	d by Account Number, Fi Reporting Levels.	scal Year, Mont	h, Campus, Cost	Center,	
	[Exp[Enc. This page allows the user to view All Transactions by Transaction Category (Allocations, Expenditures, and Encumbrances). Selections are pro Fund Group, Subobject, Object levels, Transaction Desc, Transaction Code, Document Number, Procurement Number, Requisition Number, Check Numb			onth, Campus,	Transaction Dat	e, Charge	
Tips and Tricks							~

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:

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Analysis Filters and try again. The filters currently being applied are shown below. Account begins with 000000 and Fiscal Year is equal to 16-17					
Analyze - Ref	iresh				

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).

Account begins with 900760-45 🔹 Fiscal Year (Blank for	F) 14-15						
CampusSelect Value Cost Center Month DescSelect	Value	Sub Fund GroupSelect Value	•				
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Enter does not work in BI, must click "APPLY" button

Result from BI defaults to "SUMMARY OF MAJOR OBJECTS"

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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

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Canton Total					98,062.00	0.00	104,206.66	1,319.3	2 0.00	143.58	-7,607.56	107.8			
Canton	16-17	PSR Non- Instructional	PSR Non-Instructional	Canton	95,712.00	0.00	89,513.97	0.0	0.00	143.58	6,054.45	93.7	0		
			PSR Unassigned	Canton	0.00	0.00	550.61	0.0		0.00	-550.61		0		
		PSR Non-Instr			95,712.00	0.00	90,064.58			143.58	5,503.84	94.2			
		TS Non- Instructional	Other TS Non- Instructional	Canton	0.00	0.00	11,517.86			0.00	-11,517.86		0		
		TS Non-Instru	ctional Total		0.00	0.00	11,517.86			0.00	-11,517.86				
		OTPS	Supplies	Canton	200.00	0.00	-496.90			0.00	369.58		-		
		Travel	Canton	1,000.00	0.00				0.00	61.53	93.8	-			
			Contractual	Canton	500.00	0.00	1,888.00	992.0 Document Deta	il	0.00	-2,380.00		0		
		OTPS Total			1,700.00	0.00	2,329	Charge Type	0.00	0.00	-1,948.89				
		Recharges	Postage Recharge	Canton	50.00	0.00			0.00	0.00	50.00	0.0	-		
					Central Dup & Print Recharge	Canton	500.00	0.00	13.00			0.00	487.00	2.6	-
			Automotive Recharge	Canton	100.00	0.00				0.00	-181.65		0		
		Recharges Tot	al		650.00	0.00	294.65	0.0	0.00	0.00	355.35	45.3			

Transaction Code 304A 304A 304A 319J 319J	Transaction Desc SUNY PURCHASING ASSOCIATION SUNY PURCHASING ASSOCIATION NATIONAL ASSOCIATION OF EDUCAT MCAFEE INTEL SECURITY	Document Number 7002730 7002731 7001877	Vendor SUNY PURCHASING ASSOCIATION SUNY PURCHASING ASSOCIATION NATIONAL ASSOCIATION OF	Pro uremer Nu iber <u>8- 9720</u> 8429719 112116M	Number 8429720 8429719	Check Number 05325274 05325274	Account 860760 860760		1,888.00 210.0
304A 304A 319J	SUNY PURCHASING ASSOCIATION NATIONAL ASSOCIATION OF EDUCAT	7002731	SUNY PURCHASING ASSOCIATION NATIONAL ASSOCIATION OF	8429719	8429719	05325274	_		210.0
304A 304A 319J	SUNY PURCHASING ASSOCIATION NATIONAL ASSOCIATION OF EDUCAT	7002731	SUNY PURCHASING ASSOCIATION NATIONAL ASSOCIATION OF	8429719	8429719	05325274	_		
304A 319J	NATIONAL ASSOCIATION OF EDUCAT		NATIONAL ASSOCIATION OF				860760	5003	
319J	EDUCAT	7001877		112116M				3003	210.0
	MCAFEE INTEL SECURITY		EDUCAT	1121101	<u>112116M</u>	3441012	860760	5006	735.0
319J		W283946	NO VENDOR				860760	5005	48.5
	SEC CRED MCAFEE INTEL SE	W283946	NO VENDOR				860760	5005	-48.5
3193	SEC CRED UPS 1ZCF657T1520	W283946	NO VENDOR				860760	5601	-144.9
3193	SEC CRED UPS 1ZCGT3081520	W283946	NO VENDOR				860760	5601	-144.9
319J	SEC CRED UPS 294904LQKQ3	W283946	NO VENDOR				860760	5601	-6.
319J	SEC CRED UPS 29590006125	W283946	NO VENDOR				860760	5601	-6.
3193	UPS 1ZCF657T1520017210	W283946	NO VENDOR				860760	5601	144.9
3193	UPS 1ZCGT3081520006017	W283946	NO VENDOR				860760	5601	144.9
319J	UPS 2949O4LQKQ3	W283946	NO VENDOR				860760	5601	6.7
319J	UPS 29590006125	W283946	NO VENDOR				860760	5601	6.7
3193	NATIONAL ASSOCIATION OF E	W249161	NO VENDOR				860760	5006	538.0
304A	SUNY PURCHASING ASSOCIATION	7001126	SUNY PURCHASING ASSOCIATION	9132016	<u>9132016</u>	04921070	860760	5006	195.0
	3193 3193 3193 3193 3193 3193 3193	3193 SEC CRED UPS 29590006125 3193 UPS 12CF657T1520017210 3193 UPS 12CGT5001520006017 3193 UPS 294904LQKQ3 3193 UPS 294904LQKQ3 3193 UPS 29590006125 3193 UPS 29590006125 3193 NATIONAL ASSOCIATION OF E	3193 SEC CRED UPS 29590006125 W283946 193 UPS 12C765711520017210 W283946 193 UPS 12C763081520006017 W283946 3193 UPS 294904LQKQ3 W283946 3193 UPS 294904LQKQ3 W283946 3193 UPS 29590006125 W283946 3193 UPS 29590006125 W283946 193 NATIONAL ASSOCIATION OF E W249161	3193 SEC CRED UPS 29590006125 W283946 NO VENDOR 193 UPS 12C765711520017210 W283946 NO VENDOR 193 UPS 12C763081520006017 W283946 NO VENDOR 3193 UPS 294904LQKQ3 W283946 NO VENDOR 3193 UPS 294904LQKQ3 W283946 NO VENDOR 3193 UPS 2959006125 W283946 NO VENDOR 3193 NATIONAL ASSOCIATION OF E W249161 NO VENDOR	3193 SEC CRED UPS 29590006125 W283946 NO VENDOR 193 UPS 12CF65771520017210 W283946 NO VENDOR 193 UPS 12CF6370152000617 W283946 NO VENDOR 3193 UPS 294904LQKQ3 W283946 NO VENDOR 3193 UPS 2959006125 W283946 NO VENDOR 3193 UPS 2959006125 W283946 NO VENDOR 3193 NATIONAL ASSOCIATION OF E W249161 NO VENDOR	3193 SEC CRED UPS 29590006125 W283946 NO VENDOR 193 UPS 12CF65771520017210 W283946 NO VENDOR 193 UPS 12CF65771520017210 W283946 NO VENDOR 193 UPS 12CF65771520017210 W283946 NO VENDOR 3193 UPS 294904LQKQ3 W283946 NO VENDOR 3193 UPS 2959006125 W283946 NO VENDOR 193 NATIONAL ASSOCIATION OF E W249161 NO VENDOR	3193 SEC CRED UPS 29590006125 W283946 NO VENDOR 193 UPS 12Cr65771520017210 W283946 NO VENDOR 193 UPS 12Cr65701520007017 W283946 NO VENDOR 3193 UPS 2294904LQKQ3 W283946 NO VENDOR 3193 UPS 2959006125 W283946 NO VENDOR 3193 UPS 2959006125 W283946 NO VENDOR 193 NATIONAL ASSOCIATION OF E W249161 NO VENDOR	3193 SEC CRED UPS 25590006125 W283946 NO VENDOR 860760 193 UPS 12Cr65711520017210 W283946 NO VENDOR 860760 193 UPS 12Cr65701520017210 W283946 NO VENDOR 860760 193 UPS 12Cr65701520017210 W283946 NO VENDOR 860760 193 UPS 294904LQKQ3 W283946 NO VENDOR 860760 193 UPS 2959006125 W283946 NO VENDOR 860760 193 NATIONAL ASSOCIATION OF E W249161 NO VENDOR 860760	3193 SEC CRED UPS 29590006125 W283946 NO VENDOR 860760 5601 193 UPS 12C765771520017210 W283946 NO VENDOR 860760 5601 193 UPS 12C76301520006127 W283946 NO VENDOR 880760 5601 193 UPS 12C76301520006177 W283946 NO VENDOR 880760 5501 193 UPS 2959006125 W283946 NO VENDOR 860760 5601 193 UPS 2959006125 W283946 NO VENDOR 860760 5601 193 NATIONAL ASSOCIATION OF E W249151 NO VENDOR 860760 5001

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.

equisition Summary			
Document Information			
Requisition 112116M Number:			
Date Created: 11/21/2016		Dat	e:11/21/2016
Created By: BARNE168		Last Update	ed: 11/21/2016
Total . \$735.00		Updated E	y: BARNE168
Encumbrance:		Document Statu	5 : SUNY Only
Voucher Amount: \$735.00		Budget Requisitio	n : N
Comments: NAEP Membership Renewa 300002491	Il Invoice #		
Item Information			
Ite	m Description		Item Amt
	NAEP membership dues, 201	7 Invoice # 300002791	\$735.00
Account Information			
Account Information	Fiscal Year	Sub-Object	Amount
8607600000	2016	550080	\$735.00
Vendor Information			
Vendor Name: NATIONAL ASSOC Vendor Name Additional: PROCUREMENT Vendor Address Line: 8840 STANFORD E City: COLUMBIA State: MD Zip: 21045 Country: USA			

Click on Document Number:

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ccount	Summary				Home Ca	talog Fa	worites 🗸 📗 D	ashboards 🗸 🚽	New 🗸	Signed In As	WALDRUF	F-Canton 、
Campus	Transaction Date	Transaction Code	Transaction Desc	Document Number	Vendor	Procu	urement ber	Requisition Number	Check Numb		unt Subobjec	t Amount
Grand T	otal											1,888.00
Canton	03/17/2017	304A	SUNY PURCHASING ASSOCIATION	2730	SUNY PURCHASING ASSOCIATIO	ON 8429	720	8429720	05325	274 8607	60 5003	210.0
Canton	03/17/2017	304A	SUNY PURCHASING ASSOCIATION	70.2731	SUNY PURCHASING ASSOCIATIO	ON 8429	719	8429719	05325	274 8607	60 5003	210.00
Canton	12/14/2016	304A	NATIONAL ASSOCIATION OF EDUCAT	7001877	NATIONAL ASSOCIATION OF EDUCAT	1121	<u>16M</u>	112116M	34410	12 8607	60 5006	735.00
Canton	12/06/2016	3193	MCAFEE INTEL SECURITY	W283946	NO VENDOR					8607	60 5005	48.59
Canton	12/06/2016	319J	SEC CRED MCAFEE INTEL SE	W283946	NO VENDOR					8607	60 5005	-48.59
Canton	12/06/2016	3193	SEC CRED UPS 1ZCF657T1520	W283946	NO VENDOR					8607	60 5601	-144.9
Canton	12/06/2016	3193	SEC CRED UPS 1ZCGT3081520	W283946	NO VENDOR					8607	60 5601	-144.92
Canton	12/06/2016	319J	SEC CRED UPS 294904LQKQ3	W283946	NO VENDOR					8607	60 5601	-6.7
Canton	12/06/2016	319J	SEC CRED UPS 29590006125	W283946	NO VENDOR					8607	60 5601	-6.70
Canton	12/06/2016	3193	UPS 1ZCF657T1520017210	W283946	NO VENDOR					8607	60 5601	144.92
Canton	12/06/2016	3193	UPS 1ZCGT3081520006017	W283946	NO VENDOR					8607	60 5601	144.92
Canton	12/06/2016	319J	UPS 2949O4LQKQ3	W283946	NO VENDOR					8607	60 5601	6.70
Canton	12/06/2016	3193	UPS 29590006125	W283946	NO VENDOR					8607	60 5601	6.70
Canton	11/09/2016	3193	NATIONAL ASSOCIATION OF E	W249161	NO VENDOR					8607	60 5006	538.00
Canton	10/14/2016	304A	SUNY PURCHASING ASSOCIATION	7001126	SUNY PURCHASING ASSOCIATIO	ON <u>9132</u>	016	9132016	04921	070 8607	60 5006	195.00
				and Transacti and Fiscal Yea and Object is and Detailed and Account I	gency Name is equal to / is in Canto on Category is equal to / is in Exper ar is equal to / is in 16-17 equal to / is in OTPS Object is equal to / is in Contractua egins with 860760 to Acency is equal to / is in Canton	nditure						

Get the Voucher Summary:

ucher Summary								
Document Info		1						
Document Info	mation							
Voucher 1	Number: 700	1877			Document Status :	Matched		
Total Voucher	Amount: \$73	5.00			Payment Date :	: 12/15/2016		
Items /	Amount: \$73	5.00		Vou	cher Created Date			
Funding /	Amount: \$73	5.00		Vouc	her Updated Date :	: 12/13/2016		
Invoice /	Amount: \$73	5.00			Created By	: KEITH		
Invoice Nu	mber(s): 300	002791			Last Updated:	: 12/17/2016		
	Payee : NA EDU	TIONAL ASSO JCATIONAL	CIATION OF	Ve	ucher Updated By	VoucherReconiliation		
Payee Informat	ion							
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Payee Name Ad	ditional: PR(OCUREMENT						
Payee Addre	ss Line: 884 200	0 STANFORD	BLVD SUITE			3441012		
	City: CO	LUMBIA		Check Date: 12/19/2016 Check Amount: 735.0				
	State: MD				Grieck Amount	. 755.0		
	Zip: 210	45						
(Country: US/	A Contraction						
Account Inform	ation							
Account #		Fis	scal Year		Sub Object	Amount		
860	7600000		2016		5500	80 \$735.		
Invoice Informa	tion							
Invoice #	Invoid	e Date	Receipt Date		MIR Date	Invoice Amount		
300002791		11/14/2016	12/05/2	016	12/05/2016	\$735.		

Home Catalog Favorites v Dashboard v Signed In As WALDRUFF-Canton Transaction Code Transaction Desc Document Number Vendor Procurement Number Requisition Number Account Suboject Amount 304A SUNY PURCHASING ASSOCIATION 7002730 SUNY PURCHASING ASSOCIATION 8429720 84292729 05325274 860760 5003 210.0 304A SUNY PURCHASING ASSOCIATION 7002731 SUNY PURCHASING ASSOCIATION 8429720 84292719 053325274 860760 5003 210.0 304A NATIONAL ASSOCIATION OF EDUCAT 2018977 NATIONAL ASSOCIATION OF EDUCAT 112116M 112116M 3441012 860760 5005 48.5 3193 SEC CRED MCAFEE INTEL SE W283946 NO VENDOR 860760 5601 -144.9 3193 SEC CRED UPS 12C675711520 W283946 NO VENDOR 860760 5601 -144.9 3193 SEC CRED UPS 12C675711520 W283946 NO VENDOR 860760 5601 -144.9
Transaction Desc Number Vendor Number Number Number Account Subobject Amount Number Account Subobject Amount Number Account Subobject Amount Number Number Account Subobject Amount Number Number Number Account Subobject Amount Subobject Amount Account Subobject Am
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304A SUNY PURCHASING ASSOCIATION 2002730 SUNY PURCHASING ASSOCIATION 2002730 SUNY PURCHASING ASSOCIATION 2002731 SUNY PURCHASING ASSOCIATION 2002731 SUNY PURCHASING ASSOCIATION 2002731 SUNY PURCHASING ASSOCIATION 2002731 SUNY PURCHASING ASSOCIATION 8429719 9429719 05325274 860760 5003 210.0 304A NATIONAL ASSOCIATION OF 2008721 NATIONAL ASSOCIATION OF 112116M 112116M 3441012 860760 5005 738.0 319J MCAFEE INTEL SECURITY W283946 NO VENDOR 860760 5005 48.3 319J SEC CRED UPS 120F657T1520 W283946 NO VENDOR 860760 5601 -144.5 319J SEC CRED UPS 120F657T1520 W283946 NO VENDOR 860760 5601 -144.5 319J SEC CRED UPS 120F657T1520 W283946 NO VENDOR 860760 5601 -5.7 319J SEC CRED UPS 294904LQKQ3 W283946 NO VENDOR 860760 5601 -5.7
304A SUNY PURCHASING ASSOCIATION 2002731 SUNY PURCHASING ASSOCIATION 2002731 SUNY PURCHASING ASSOCIATION 9429719 9429719 05325274 860760 5003 210.0 304A NATIONAL ASSOCIATION OF EDUCAT NATIONAL ASSOCIATION OF EDUCAT 112116M 112116M 3441012 860760 5005 483. 3193 MCAFEE INTEL SECURITY W283946 NO VENDOR 880760 5001 -144.3 3193 SEC CRED UPS 12C67571520 W283946 NO VENDOR 880760 5601 -144.3 3193 SEC CRED UPS 12C67571520 W283946 NO VENDOR 880760 5601 -144.3 3193 SEC CRED UPS 12C67571520 W283946 NO VENDOR 880760 5601 -144.3 3193 SEC CRED UPS 12C67571520 W283946 NO VENDOR 880760 5601 -6.5 3193 SEC CRED UPS 23590006125 W283946 NO VENDOR 860760 5601 -6.5 3193 UPS 249904U2037
304A NATIONAL ASSOCIATION OF EDUCAT 2001877 EDUCAT NATIONAL ASSOCIATU OF EDUCAT 112116M 112116M 3441012 860760 5006 735.4 3193 MCAFEE INTEL SECURITY W283946 NO VENOOR 860760 5005 443.3 3193 SEC CRED URAFEE INTEL SE W283946 NO VENOOR 860760 5005 443.3 3193 SEC CRED UPS 12/C657/1520 W283946 NO VENOOR 860760 5001 1444.3 3193 SEC CRED UPS 12/C657/1520 W283946 NO VENDOR 860760 5601 1444.3 3193 SEC CRED UPS 294904LQKQ3 W283946 NO VENDOR 860760 5601 -6.7 3193 SEC CRED UPS 294904LQKQ3 W283946 NO VENDOR 860760 5601 -6.7 3193 UPS 12/C6573081520007017 W283946 NO VENDOR 860760 5601 144.3 3193 UPS 12/C6573081520006017 W283946 NO VENDOR 860760 5
EDUCAT EDUCAT B80760 S005 48.3 319J MCAFEE INTEL SECURITY W283946 NO VENDOR 860760 5005 48.3 319J SEC CRED MCAFEE INTEL SE W283946 NO VENDOR 860760 5005 48.3 319J SEC CRED UPS 12C6F5711520 W283946 NO VENDOR 860760 5601 -144.3 319J SEC CRED UPS 12C6F5701520 W283946 NO VENDOR 860760 5601 -144.3 319J SEC CRED UPS 249404LQQ3 W283946 NO VENDOR 860760 5601 -6.7 319J SEC CRED UPS 249404LQQ3 W283946 NO VENDOR 860760 5601 -6.7 319J UPS 12C6F5713081520017210 W283946 NO VENDOR 860760 5601 144.3 319J UPS 12C6F5713081520006127 W283946 NO VENDOR 860760 5601 144.3 319J UPS 2959006125 W283946 NO VENDOR 860760 5601 144.3 319J UPS 2959006125 W283946
319J SEC CRED MCAFEE INTEL SE W283946 NO VENDOR 860760 5005 -48.3 319J SEC CRED UPS 12C65711520 W283946 NO VENDOR 860760 5601 -144.3 319J SEC CRED UPS 12C657511520 W283946 NO VENDOR 860760 5601 -144.3 319J SEC CRED UPS 294904LQKQ3 W283946 NO VENDOR 860760 5601 -6.7 319J SEC CRED UPS 294904LQKQ3 W283946 NO VENDOR 860760 5601 -6.7 319J UPS 12C65571152001721 W283946 NO VENDOR 860760 5601 -6.7 319J UPS 12C65571152001721 W283946 NO VENDOR 860760 5601 144.3 319J UPS 12C67530152000617 W283946 NO VENDOR 860760 5601 144.3 319J UPS 12C665713041520006017 W283946 NO VENDOR 860760 5601 144.3 319J UPS 2959006125 W283946 NO VENDOR 860760 5601 56.7 31
319.0 SEC CRED UPS 12CGF657T1520 W283946 NO VENDOR 860760 5601 -144.3 319.1 SEC CRED UPS 12CGF37081520 W283946 NO VENDOR 860760 5601 -144.3 319.1 SEC CRED UPS 12CGF37081520 W283946 NO VENDOR 860760 5601 -46.4 319.1 SEC CRED UPS 23950006125 W283946 NO VENDOR 860760 5601 -6.5 319.1 UPS 12CGF5371520017210 W283946 NO VENDOR 860760 5601 144.3 319.1 UPS 12CGF65771520017210 W283946 NO VENDOR 860760 5601 144.3 319.1 UPS 12CGF308152000617 W283946 NO VENDOR 860760 5601 144.3 319.1 UPS 2959006125 W283946 NO VENDOR 860760 5601 144.3 319.1 UPS 2959006125 W283946 NO VENDOR 860760 5601 56.3 319.1 UPS 2959006125 W283946 NO VENDOR 860760 5601 56.3 319.
319J SEC CRED UPS 12CGT3081520 W283946 NO VENDOR 860760 5601 -144.3 319J SEC CRED UPS 24964U,QKQ3 W283946 NO VENDOR 860760 5601 -6.7 319J SEC CRED UPS 29590006125 W263946 NO VENDOR 860760 5601 -6.7 319J UPS 12CF65711520017210 W283946 NO VENDOR 860760 5601 144.3 319J UPS 12CF65711520017210 W283946 NO VENDOR 860760 5601 144.3 319J UPS 12CGT3081520006017 W283946 NO VENDOR 860760 5601 144.3 319J UPS 29590000125 W283946 NO VENDOR 860760 5601 144.3 319J UPS 2959000125 W283946 NO VENDOR 860760 5601 6.7 319J UPS 2959000125 W283946 NO VENDOR 860760 5601 6.7 319J NATIONAL AL OCIATION OF E W249161 NO VENDOR 860760 5006 538.4
319J SEC CRED UPS 294904LQKQ3 W28334 NO VENDOR 860760 5601 -6.: 319J SEC CRED UPS 294904LQKQ3 W28334 NO VENDOR 860760 5601 -6.: 319J UPS 12056771520017210 W283346 NO VENDOR 860760 5601 144. 319J UPS 1205673152001721 W283346 NO VENDOR 860760 5601 144. 319J UPS 1205G730152000617 W283346 NO VENDOR 860760 5601 144. 319J UPS 2959006125 W283946 NO VENDOR 860760 5601 6.: 319J UPS 2959006125 W283946 NO VENDOR 860760 5601 6.: 319J UPS 2959006125 W283946 NO VENDOR 860760 5601 6.: 319J NATIONAL MOCIATION OF E W243946 NO VENDOR 860760 5601 6.: 319J NATIONAL MOCIATION OF E W243946 NO VENDOR 860760 5006 538.
3193 SEC CRED UPS 29590006125 W0.09346 NO VENDOR 860760 5601 1-6. 3191 UPS 12CF65771520017210 W283946 NO VENDOR 860760 5601 144. 3193 UPS 12CF63701520017210 W283946 NO VENDOR 860760 5601 144. 3193 UPS 294904LQKQ3 W283946 NO VENDOR 860760 5601 164. 3193 UPS 2959006125 W283946 NO VENDOR 860760 5601 66. 3193 UPS 2959006125 W283946 NO VENDOR 860760 5601 66. 3193 UPS 2959006125 W283946 NO VENDOR 860760 5601 66. 3193 NATIONAL M OCIATION OF E W2439161 NO VENDOR 860760 5601 66.
JUPS 12CF657T1520017210 W283946 NO VENDOR 860760 5601 144. 319.1 UPS 12CGT5081520006017 W283946 NO VENDOR 860760 5601 144. 319.1 UPS 294904LQKQ3 W283946 NO VENDOR 860760 5601 144. 319.1 UPS 294904LQKQ3 W283946 NO VENDOR 860760 5601 661. 319.1 UPS 2959000125 W283946 NO VENDOR 860760 5601 66. 319.1 NATIONAL AL OCIATION OF E W249161 NO VENDOR 860760 5006 538.
319J UPS 12CGT3081520006017 W283946 NO VENDOR 860760 5601 144.3 319J UPS 2949O4LQKQ3 W283946 NO VENDOR 860760 5601 65.3 319J UPS 2949O4LQKQ3 W283946 NO VENDOR 860760 5601 65.3 319J UPS 2959O060125 W283946 NO VENDOR 860760 5601 65.3 319J NATIONAL ALOCIATION OF E W249161 NO VENDOR 860760 5006 538.
319J UPS 294904LQKQ3 W283946 NO VENDOR 860760 5601 6.3 319J UPS 29590006125 W283946 NO VENDOR 860760 5601 6.3 319J UPS 29590006125 W283946 NO VENDOR 860760 5601 6.3 319J NATIONAL ALGOCIATION OF E W249161 NO VENDOR 860760 5006 538.4
319J UPS 29590005125 W283946 NO VENDOR 860760 5601 6. 319J NATIONAL ALOCIATION OF E W249161 NO VENDOR 860760 5006 538.
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304A SUNY EXCHASING ASSOCIATION 7001126 SUNY PURCHASING ASSOCIATION 9132016 04921070 860760 5006 195.0
Charge Agency Name is equal to / is in Canton and Transaction Category is equal to / is in Expenditure and Fiscal Year is equal to / is in 16-17 and Object is equal to / is in OTPS and Detailed Object is equal to / is in Contractual

To return to previous page, always click return, do not use "back" button on browser

Charge Type:

				Account	Account Local	Desc Cost Cente	er Account	Manager					
					PURCHASING	28-436366		Hallager					
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					Select View:	Summary by De	tailed Object 🗸						
Charge Agency	Fiscal			Onligating	Allocation	Pending	Expenditure	Pending	Encumbrance	Pending	Available	%	
Name	Year	Object	Detailed Object	Agenc	Total	Allocation		Expenditure	Total	Encumbrance	Balance	Used	
Grand Total		1			98,062.00	0.00	104,206.66	1,319.32	0.00	143.58	-7,607.56	107.8	
Canton Total					98,062.00	0.00	104,206.66	1,319.32	0.00	143.58	-7,607.56	107.8	
Canton 16-17	PSR Non- Instructional	PSR Non-Instructional	Canton	95,712.00	0.00	89,513.97	0.00	0.00	143.58	6,054.45	93.7	0	
		PSR Unassigned	Canton	0.00	0.00	550.61	0.00	0.00				0	
	TS I Inst TS I	PSR Non-Instr			95,712.0u	0.00	90,064.58	0.00	0.00	143.58		94.2	
		TS Non- Instructional	Other TS Non- Instructional	Canton	0.00	0.00	11,517.86	0.00	0.00	0.00	-11,517.86		0
		TS Non-Instru	Instructional Total			1.00	11,517.86	0.00	0.00	0.00	-11,517.86		
		OTPS	Supplies	Canton	200.00	0	-496.90	327.32	0.00				٩
			Travel	Canton	1,000.00			0.00	0.00			93.8	0
			Contractual	Canton	500.00	0.00	1, 13, 1	Document Deta		0.00			0
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Results: can drill down on Document Number & Procurement Number from here as well:

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		TS	Canton	0.00	0.10	11,517.86	0.00	0.00	0.00	-11,517.86		
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Several option 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 formating, use Excel, if you want data only, use CSV format:

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Grand Total Canton Total		PSR TS OTPS PSR	Canton Canton Canton Canton	y Allocation Total 288,015.00 288,013.00 88,434.00 2,999.00 4,441.00 87,597.00	Analyze *R Select View: Sum Pending Allocation 0.00 0.00 0.00 0.00 0.00	28-436366-18-16 efresh - Print - Exco mmary by Major Obj Expenditure Total 1 294,159.70 88,433.50 3,000.00 4,440.65 87,596.97	s int iect ▼ Pending Expenditure 183.55 183.55 0.00 0.00 0.00 0.00 0.00 0.00	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	143.5 143.5 0.0 0.0 0.0 0.0	·6,471.78 ·6,471.78 ·6,471.78 ·0 ·0 ·1.00 ·0 ·1.00 ·0 ·1.00 ·1.00 ·1.00 ·1.00 ·1.00 ·1.00 ·1.00 ·1.00 ·1.00 ·1.00	102.2 102.2 100.0 100.0 100.0 100.0	
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Grand Total Canton Total	14-15	PSR TS OTPS PSR	Canton Canton Canton Canton	y Allocation Total 288,015.00 288,013.00 88,434.00 2,999.00 4,441.00 87,597.00	Analyze *R Select View: Sum Pending Allocation 0.00 0.00 0.00 0.00 0.00	28-436366-18-16 efresh - Print - Exco mmary by Major Obj Expenditure Total 1 294,159.70 88,433.50 3,000.00 4,440.65 87,596.97	s int iect ▼ Pending Expenditure 183.55 183.55 0.00 0.00 0.00 0.00 0.00 0.00	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	143.5 143.5 0.0 0.0 0.0 0.0 0.0	8 -6,471.78 8 -6,471.78 00 0.50 00 -1.00 00 0.35 00 0.035 00 0.40	102.2 102.2 100.0 100.0 100.0 100.0	
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Grand Total Canton Total	14-15	PSR TS OTPS PSR TS OTPS	Canton Canton Canton Canton Canton Canton	y Allocation Total 288,015.00 288,015.00 288,015.00 289,015.00 289,015.00 4,441.00 87,597.00 2,869.00 3,613.00	Analyze * E Select View: Sur Pending Allocation 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	28-436366-1R-16 efresh - Print - Exco mary by Major Obj Expenditure Total 12 294,139.70 294,139.70 88,433.50 3,000.00 4,440.65 87,596.97 2,868.60 3,613.32	s tet tet Pending Expenditur 183.5/ 183.5/ 0.00	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.000 0.00	143.5 143.5 0.0 0.0 0.0 0.0 0.0 0.0	8 -6,471.78 80 -6,471.78 90 0.50 90 -1.00 90 0.35 90 0.33 90 0.33 90 0.33 90 0.33 90 0.40 90 -0.32 98 5,503.84	102.2 102.2 100.0 100.0 100.0 100.0 100.0 100.0	
Grand Total Canton Total	14-15	PSR TS OTPS PSR TS OTPS PSR	Canton Canton Canton Canton Canton Canton Canton Canton	y Allocaton Total 288,013.00 88,834.00 2.999.00 4,441.00 87,597.00 2.869.00 3.613.00 95,712.00	Analyze * E Select View: Sur Pending Allocation 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	29-436366-1R-16 efresh - Pirit - Exco mary by Major Obj Expenditure Total (294,139.70 88,433.50 3,000.00 4,440.65 87,596.97 2,868.60 3,613.32 90,064.58	s tet ▼ Pending Expenditur 183.54 0.00 0.0	00.0 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	143.5 143.5 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0	8 -6,471.78 88 -6,471.78 80 -6,471.78 90 0.50 90 -1.00 90 0.33 90 0.033 90 -0.32 90 -0.32 88 5,503.84 90 -11,517.86	102.2 102.2 100.0 100.0 100.0 100.0 100.0 100.0 94.2	

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 snap shot 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

0

- Dormitory Operations Res Hall accounts
- Dormitory Sponsored Res Hall IFR accounts

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Account Summary Ho	me 📙 Catalog 📙 Favorites 🗸 🗍 Dashi	boards 🗸 📋 🎴 New 🗸 🕴 Signed In As 🛛 WALSHJ-New Paltz 🗸
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Reporting Level 1Select Value- 🗷 Reporting Level 2Select Value- 🔍 Reporting Level 3 🗐 State Purpose R	egular 🔶	Reporting Level 5Select Value Apply
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Account Summary	1	
Dormitory Opera	ions	
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Account Account Le Hospital Operation		
860720 FINANCE & Search	0-321210-3K-11	
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Select View: Summary by Detailed	Object 🔻	

5) *Reporting Level 1* - can choose all accounts under a specific Vice President (depends on your access)

SUNY The State Extension of the State Extensi	Search All	~	🜔 Adva	nced Help 🗸 Sign Out 🍹
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□ NULL				Apply Reset ~
President				
VP for Academic Affairs				
VP for Admin Services				
Account Summa Student Affairs				
VP for Advancement / Alumni				
No Results				
The specified Capitol Projects a. This is often caused by applying filters and/or selection	ns that are too restrictive	or that contain	incorrect values.	Please check your
Analysis Filtesearch rently being applied are shown below.				

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

SUNY The State University Business Intelligence		Search All		Advanced	Help 🗸 🛛 Sign Out 🖸
SUNT of New York		Home Catalog Favorites	✓ Dashboards ✓		s WALDRUFF-Canton ~
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	Diversity				Apply Reset ✓
	VP for Academic Affairs				hopiy house v
	School Bus & Liberal Arts				
	School of Engineer Tech				
Account Summary	Science, Health, CJ				
1	Institutional Research				
No Results	Office of the Registrar				
The specified criteria didn't result in any data. Th	Academic Support and/or se	lections that are too restrict	ive or that contain in	ncorrect values. Pleas	e check your
Analysis Filters and try again. The filters currently	Search				

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"

SUNY The State Diversity Business Intelligence	Search All	~	💿 Advanced Help 🗸 Sign Out 📿
Account Summary	ome Catalog Fav	orites 🗸 Dashboards 🗸	New 🗸 🛛 Signed In As WALDRUFF-Canton 🗸
Introduction Account Summary Multiple Accounts Summary Payroll Search Open PO's Actua	I Alloc/Exp/En	p/Enc All Alloc/Exp/Enc	
Selections			
Account begins with <u>Select Value</u> Fiscal Year 14-15 Campus <u>Select Value</u> Cost Center Month Desc <u>Select Value</u> Sub Fund Group <u>Select Value</u> Reporting Level 1 <u>Select Value</u> Reporting Level 2 <u>Select Value</u> Reporting Level 3	Select Value Reporting	Level 4Select Value	Reporting Level 5Select Value- Apply Reset
	Homeland Security Dental Hygiene		
Account Summary	Dental Hygiene BT		
(i) No Results	Chemistry Sports Management		
The specified criteria didn't result in any data. This is often caused by applying filters an Analysis Filters and try again. The filters currently being applied are shown below.		e or that contain	n incorrect values. Please check your

Shows all accounts associated with department, summarizes IFR accounts separately and summarizes all expenditures, allocation, etc together:



 Account
 Account Local Desc
 Cost Center
 A

 630040-02
 510LOGY
 28-436366-1R-14

 910040-02
 810LOGY
 28-436366-0R-14

 Analyze
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 ount Manage H Assessments (-) Ex 1,024.61
 Fiscal Year
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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.

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