

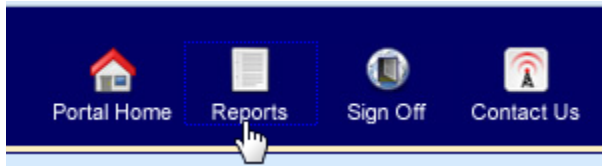
## SUNY BI Documentation

Sign on instructions: **Mozilla Firefox is the recommended browser.**

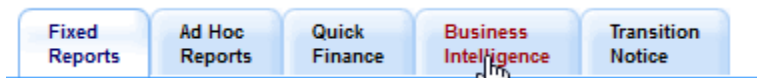
Begin sign on from [www.suny.edu/analytics](http://www.suny.edu/analytics) via Mozilla Firefox.

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

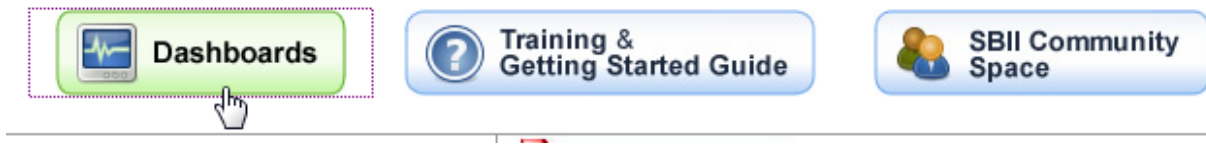
1. Begin sign on as you would for SMRT from [www.suny.edu](http://www.suny.edu) via Mozilla Firefox.
2. When you get to the Employees Services Portal, click on Reports in the upper right hand section.



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.



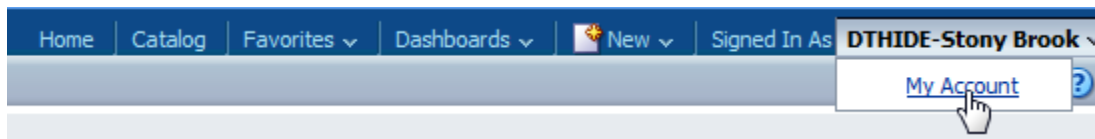
**Stony Brook users with “Account Level” security should see these Financials dashboards:**

1. Account Summary
2. End of Month
3. Expenditure Inquiry
4. IFR Cash
5. Management Summary
6. Reference
7. Transaction Inquiry

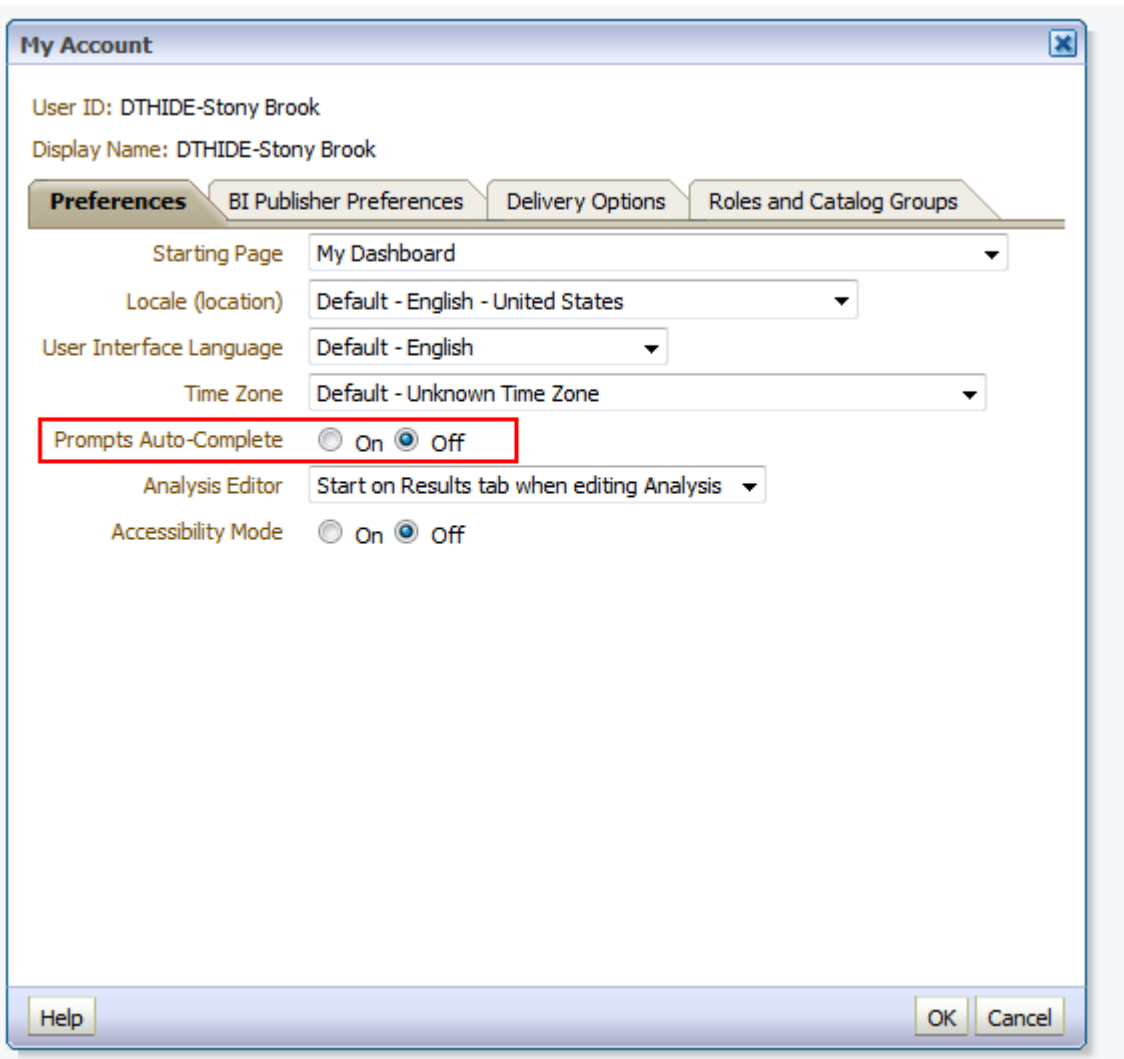
Note that as additional dashboards are developed, this list may change.

## 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.

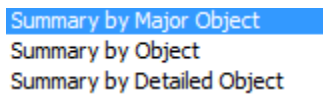
- You can access data back to FY 08-09 for appropriated funds accounts.
- Data can be returned by Fund and/or Reporting Level (VP area.)

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.

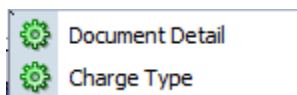
Account begins with  Fiscal Year (Blank for CF)

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.

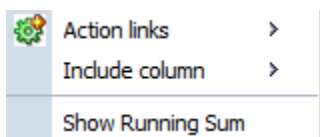


8. You can print or export the data that is returned.
9. You can drill down on items that are displayed in **blue**.

Left click provides these choices:



Right click provides these choices:



### Accessing the Management Summary dashboard:

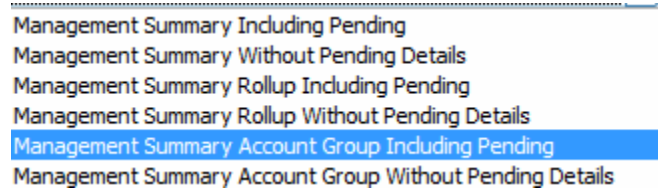
This dashboard group includes Management Summary and IFR Management Summary.

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.)

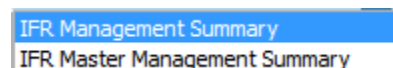
### Management Summary:

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.



### 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.



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.

### Management Summary Account Group Including Pending

Account Group	Account Group Desc	Account	Account Local Desc	Variable
<b>Grand Total</b>				
<b>01010084072300 Total</b>				
01010084072300	Ombudsman	840723	OMBUDSMAN	1R
<b>01010086010900 Total</b>				
01010086010900	WANG Operating Expenses	860109-01	WANG PROGRAMMING EXPENSES	1R
		860109-99	WANG OPERATING EXPENSES	1R
<b>01010086070100 Total</b>				
01010086070100	Chief Administrative Office	860701	CHIEF ADMINISTRATIVE OFFICE	1R
		860703	CAMPUS SUPPORT INITIATIVES	1R
		860810	SEFA/UNITED WAY CAMPAIGN	1R
<b>01010086072600 Total</b>				

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".

### Management Summary Including Pending

Account	Account Local Desc	Account Group	Account Group Desc	Variable
<b>Grand Total</b>				
420140	WANG FACILITIES	01010086082000	University Special Events	1R
840722	BUDGET REDUCTION	01010097956000	Jones/Spinola /Childs Estate	1R
840723	OMBUDSMAN	01010084072300	Ombudsman	1R
840730	POSE-PRESIDENTS OFF. SPECIAL EVE	01010086082000	University Special Events	1R
860109-01	WANG PROGRAMMING EXPENSES	01010086010900	WANG Operating Expenses	1R
860109-99	WANG OPERATING EXPENSES	01010086010900	WANG Operating Expenses	1R
860701	CHIEF ADMINISTRATIVE OFFICE	01010086070100	Chief Administrative Office	1R
860703	CAMPUS SUPPORT INITIATIVES	01010086070100	Chief Administrative Office	1R
860726	UNIVERSITY/COLLEGE COUNSEL	01010086072600	University Counsel	1R
860777	EMPLOYEE ASSISTANCE PROGRAM	01010086077700	Employee Assistance Program	1R
860778	OFFICE OF DIVERSITY & INCLUSION	01010086077800	Diversity & Affirmative Action	1R
860785	MANAGEMENT ANALYSIS & AUDIT	01010086078500	Management Analysis & Audit	1R
860810	SEFA/UNITED WAY CAMPAIGN	01010086070100	Chief Administrative Office	1R