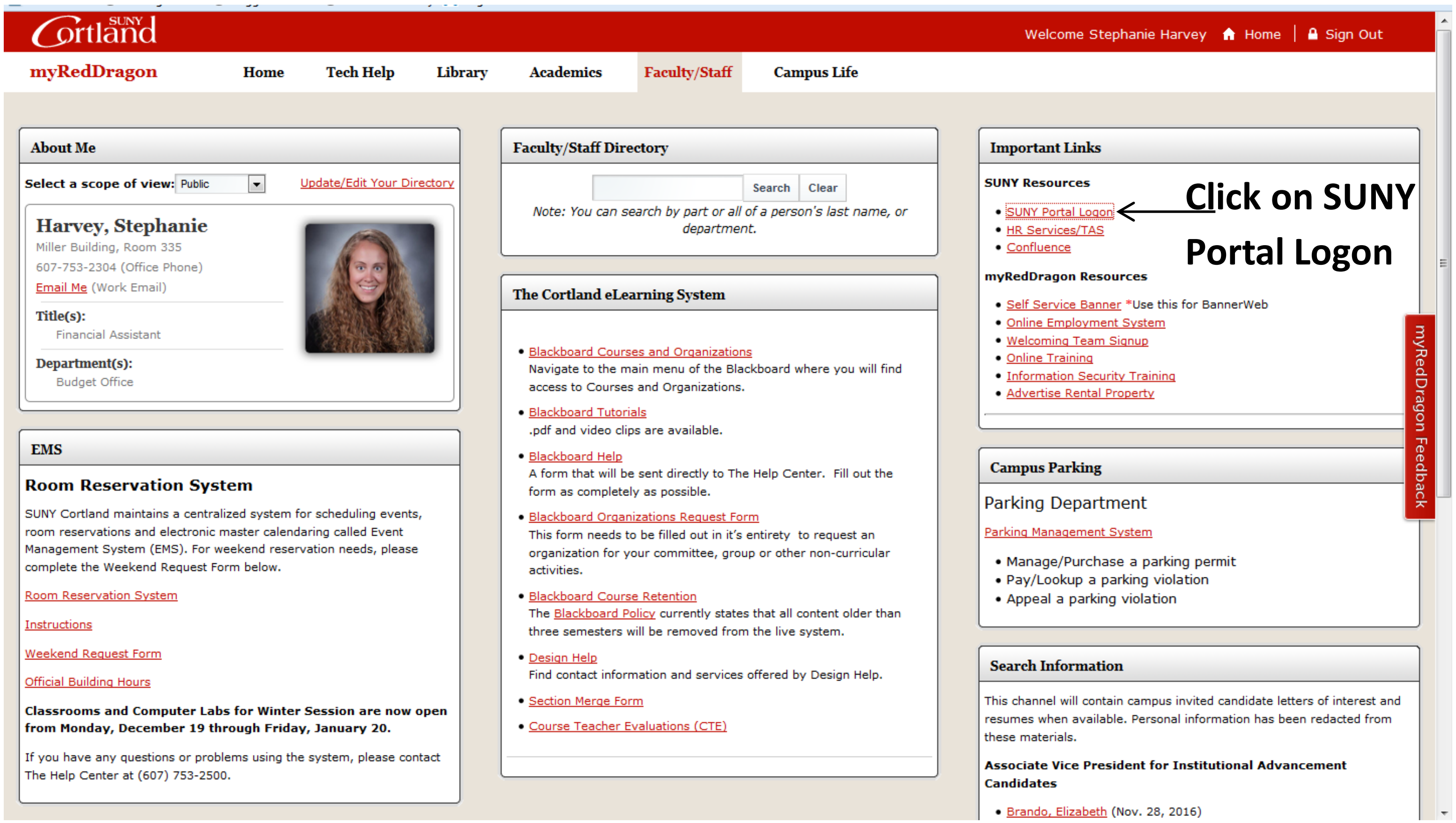
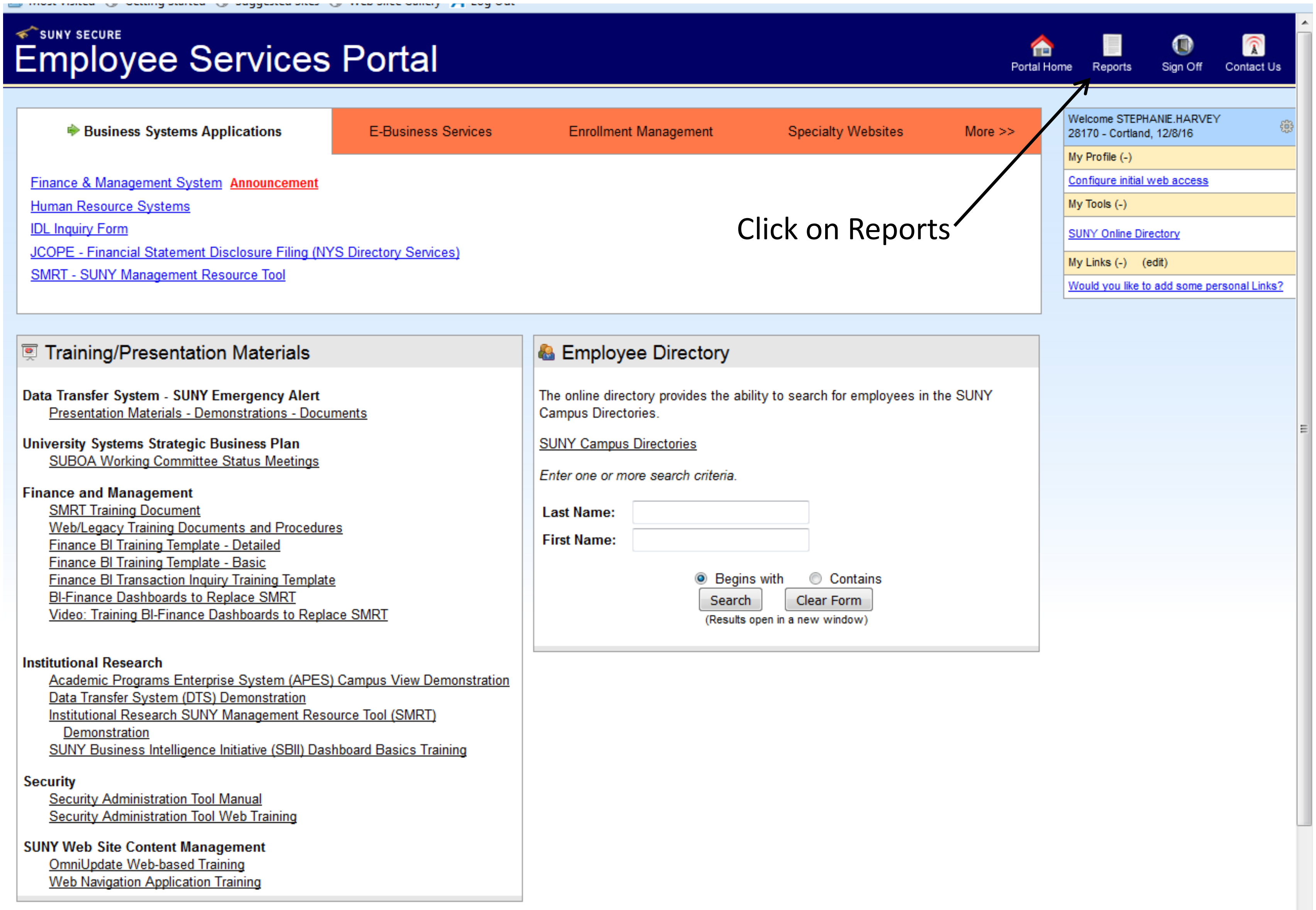
Quick Guide to Business Intelligence (BI)

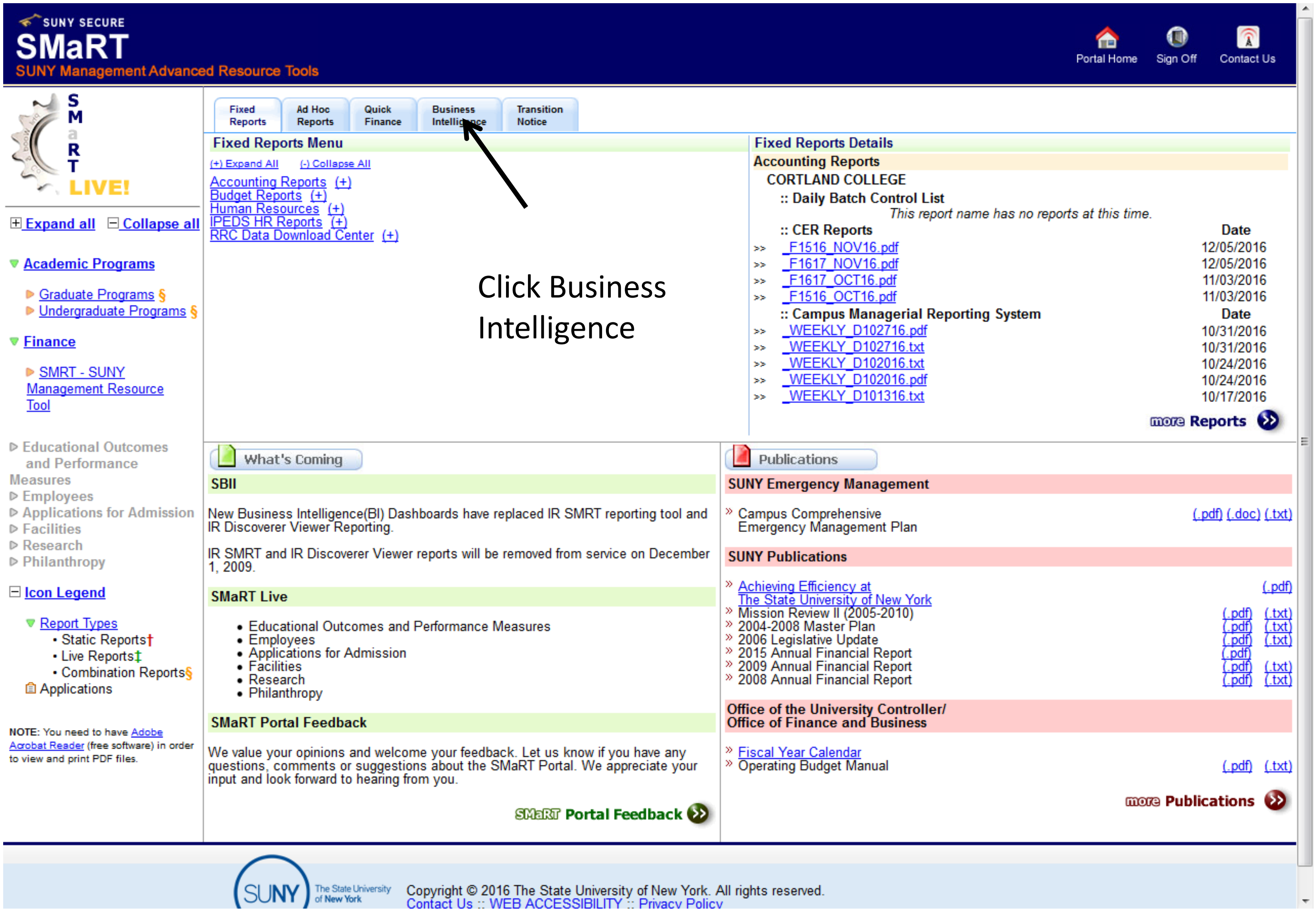
To request access to BI, complete the [SUNY System Security Request Form.]()

Log onto myRedDragon to get started



***Always use Firefox or Microsoft Edge as your browser for BI.**


SUNY SECURE
Employee Services Portal
Portal Home
Reports
Sign Off
Contact Us
Business Systems Applications
E-Business Services
Enrollment Management
Specialty Websites
More >>
Welcome STEPHANIE.HARVEY
28170 - Cortland, 12/8/16
My Profile (-)
Configure initial web access
My Tools (-)
SUNY Online Directory
My Links (-) (edit)
Would you like to add some personal Links?
Finance & Management System Announcement
Human Resource Systems
IDL Inquiry Form
JCOPE - Financial Statement Disclosure Filing (NYS Directory Services)
SMRT - SUNY Management Resource Tool
Click on Reports
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
BI-Finance Dashboards to Replace SMRT
Video: Training BI-Finance Dashboards to Replace SMRT
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
SUNY Web Site Content Management
OmniUpdate Web-based Training
Web Navigation Application Training
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
Search
Clear Form
(Results open in a new window)



Click Business Intelligence

SUNY SECURE
SMaRT
SUNY Management Advanced Resource Tools

Portal Home | Sign Off | Contact Us

S M a R T LIVE!

Expand all | Collapse all

- **Academic Programs**
  - Graduate Programs §
  - Undergraduate Programs §
- **Finance**
  - SMRT - SUNY Management Resource Tool
- Educational Outcomes and Performance Measures
- Employees
- Applications for Admission
- Facilities
- Research
- Philanthropy

Icon Legend

- Report Types
  - Static Reports†
  - Live Reports‡
  - Combination Reports§
- Applications

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

Fixed Reports | Ad Hoc Reports | Quick Finance | 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.

Dashboards | Training & Getting Started Guide | SBII Community Space

Click Dashboards

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.

SMaRT Portal Feedback

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)
» 2009 Annual Financial Report (.pdf) (.txt)
» 2008 Annual Financial Report (.pdf) (.txt)

Office of the University Controller/ Office of Finance and Business

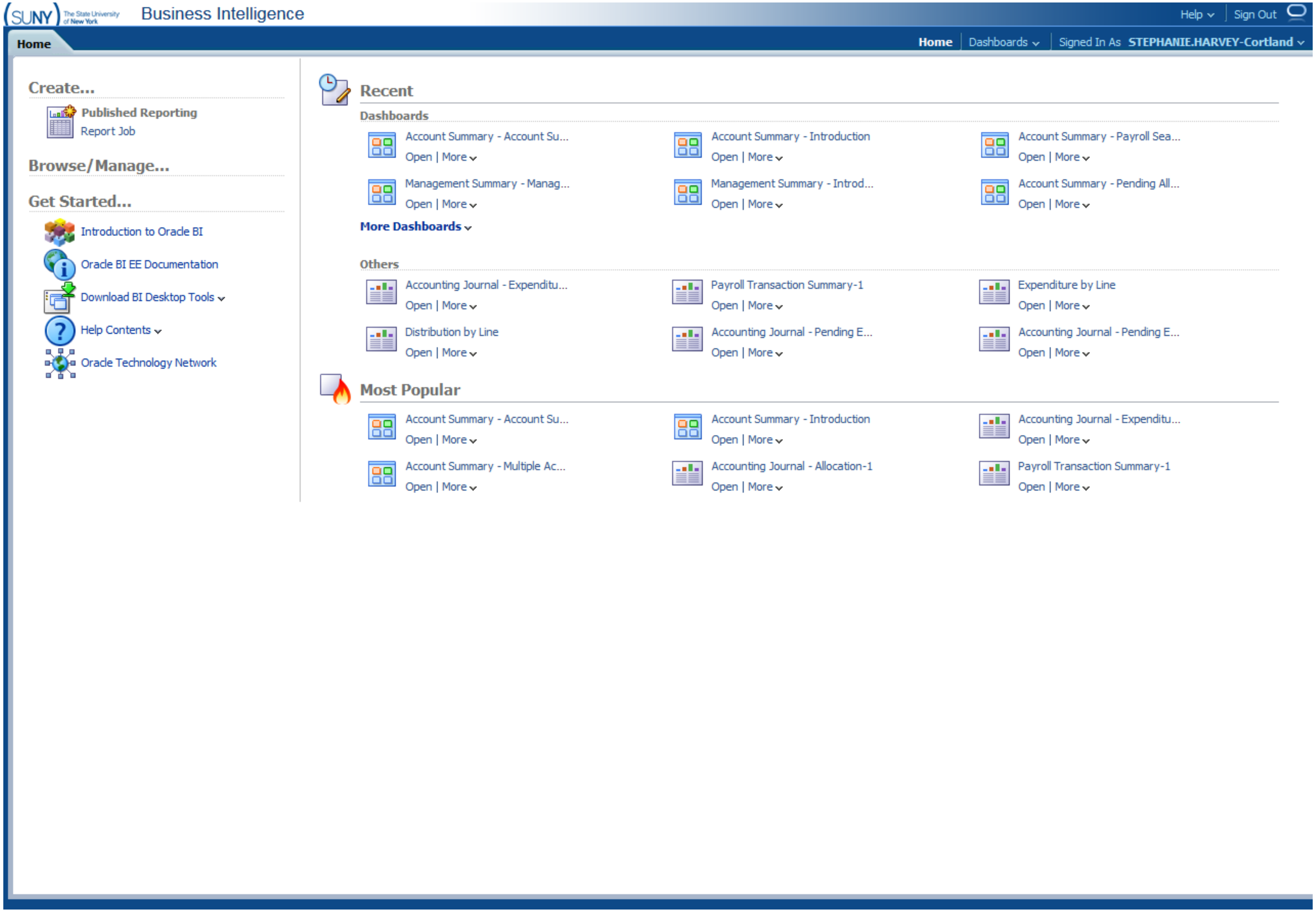
» Fiscal Year Calendar
» Operating Budget Manual (.pdf) (.txt)

more Publications

SUNY The State University of New York

Contact Us :: WEB ACCESSIBILITY :: Privacy Policy

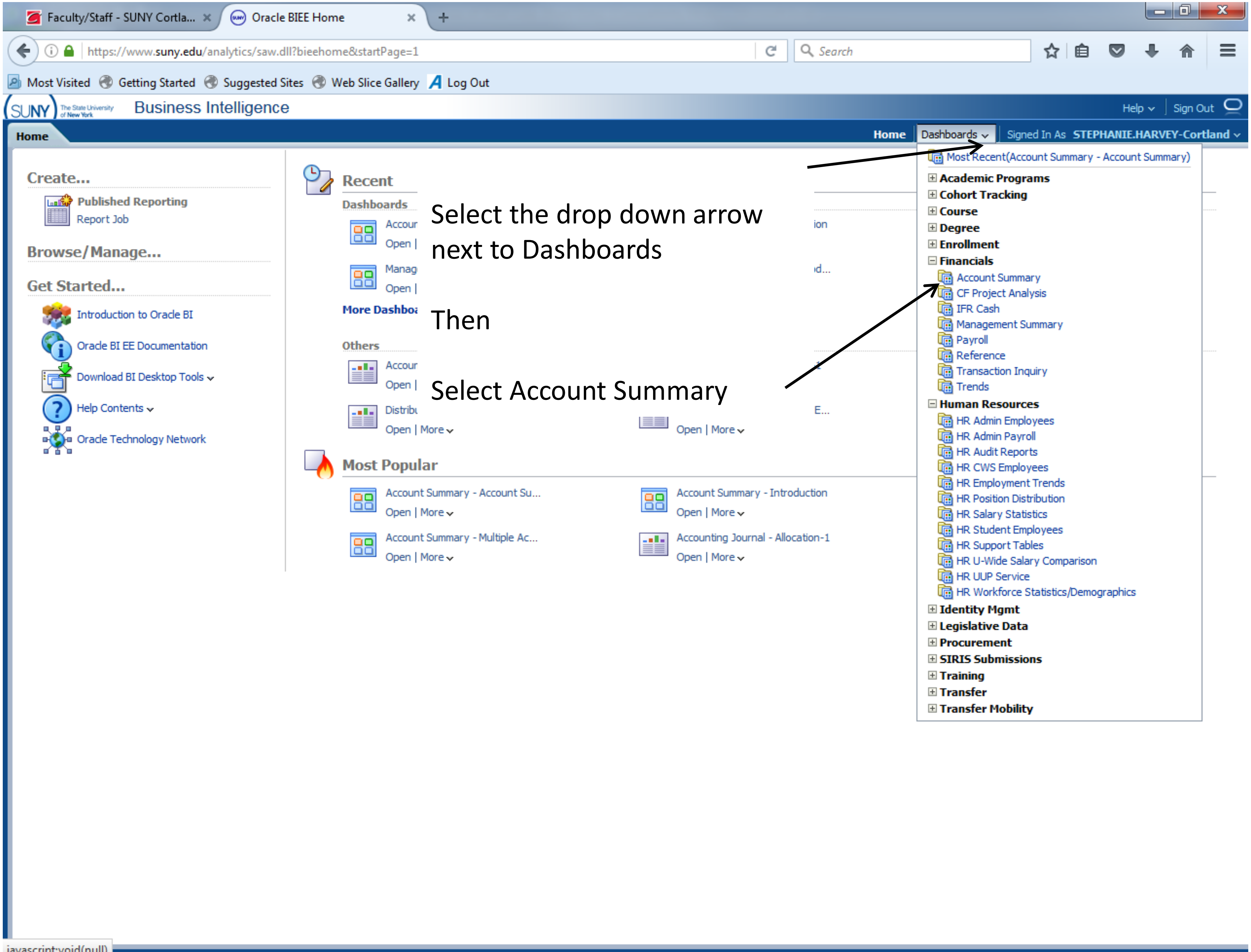
This is Business Intelligence’s (BI) home page.

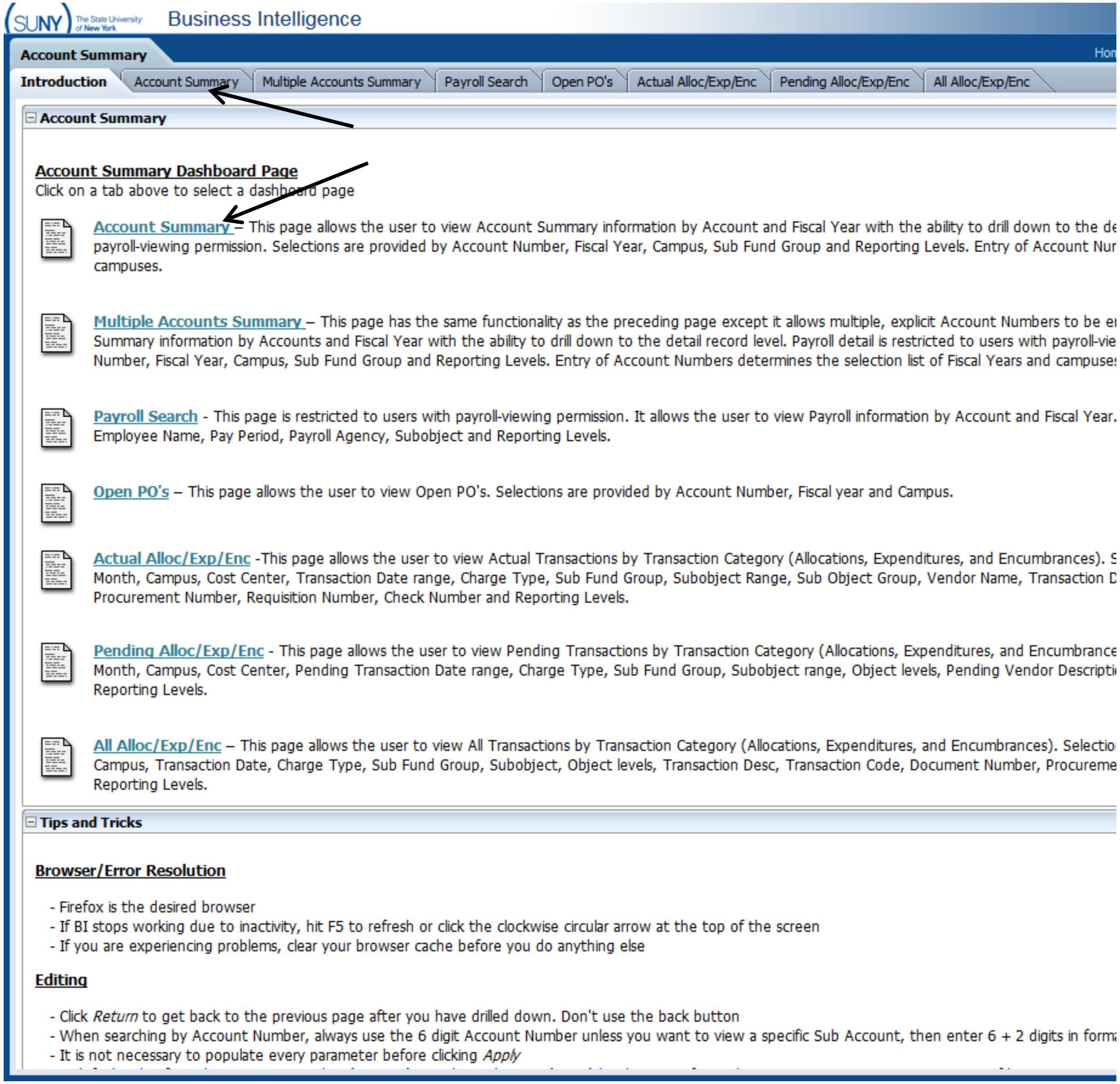


Select the drop down arrow next to Dashboards

Then

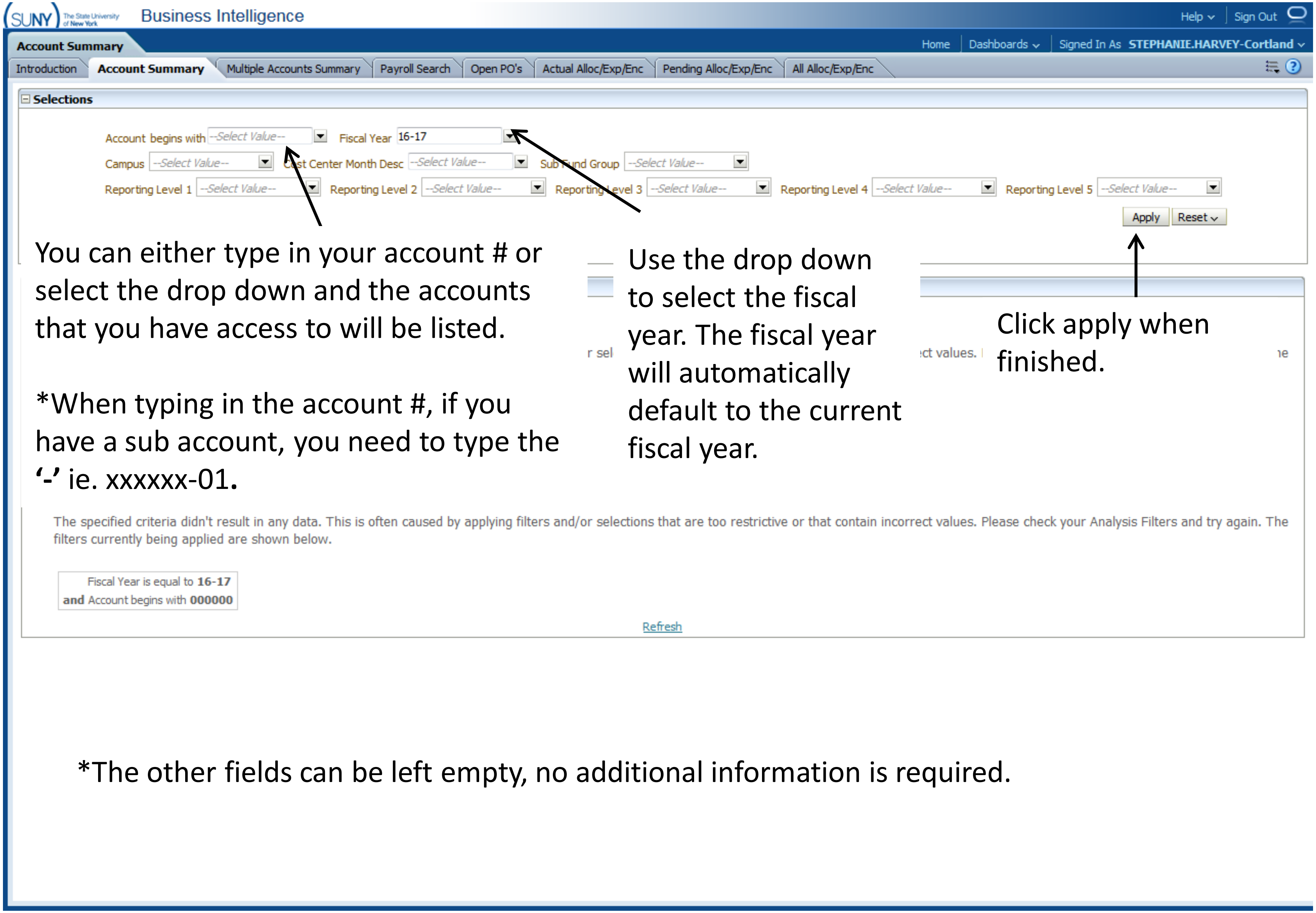
Select Account Summary





For Account Summary information you can click either the Account Summary tab or the Account Summary link.

The other tabs and links will give you additional account information.



You can either type in your account # or select the drop down and the accounts that you have access to will be listed.

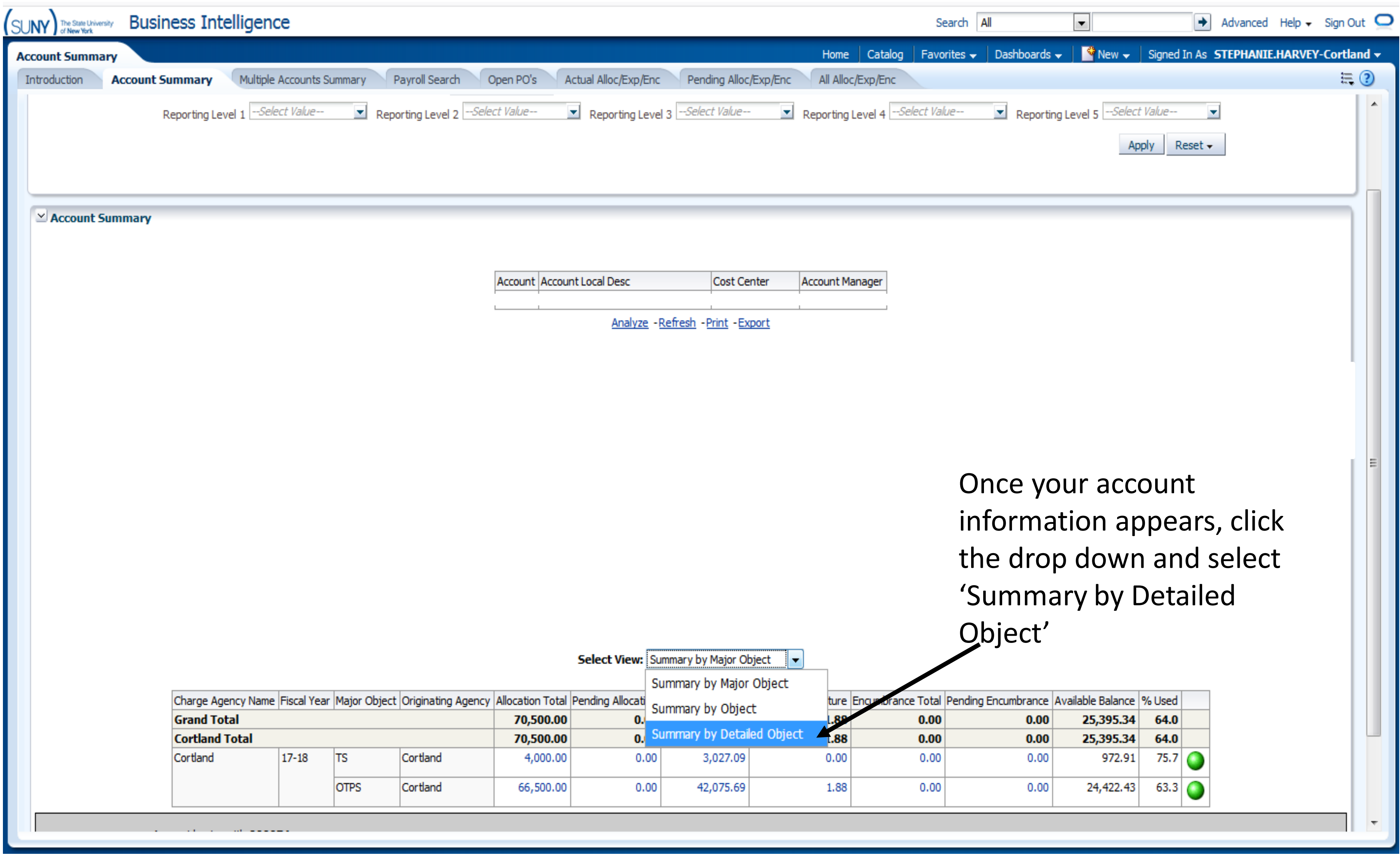
*When typing in the account #, if you have a sub account, you need to type the **'-'** ie. xxxxxx-01**.**

Use the drop down to select the fiscal year. The fiscal year will automatically default to the current fiscal year.

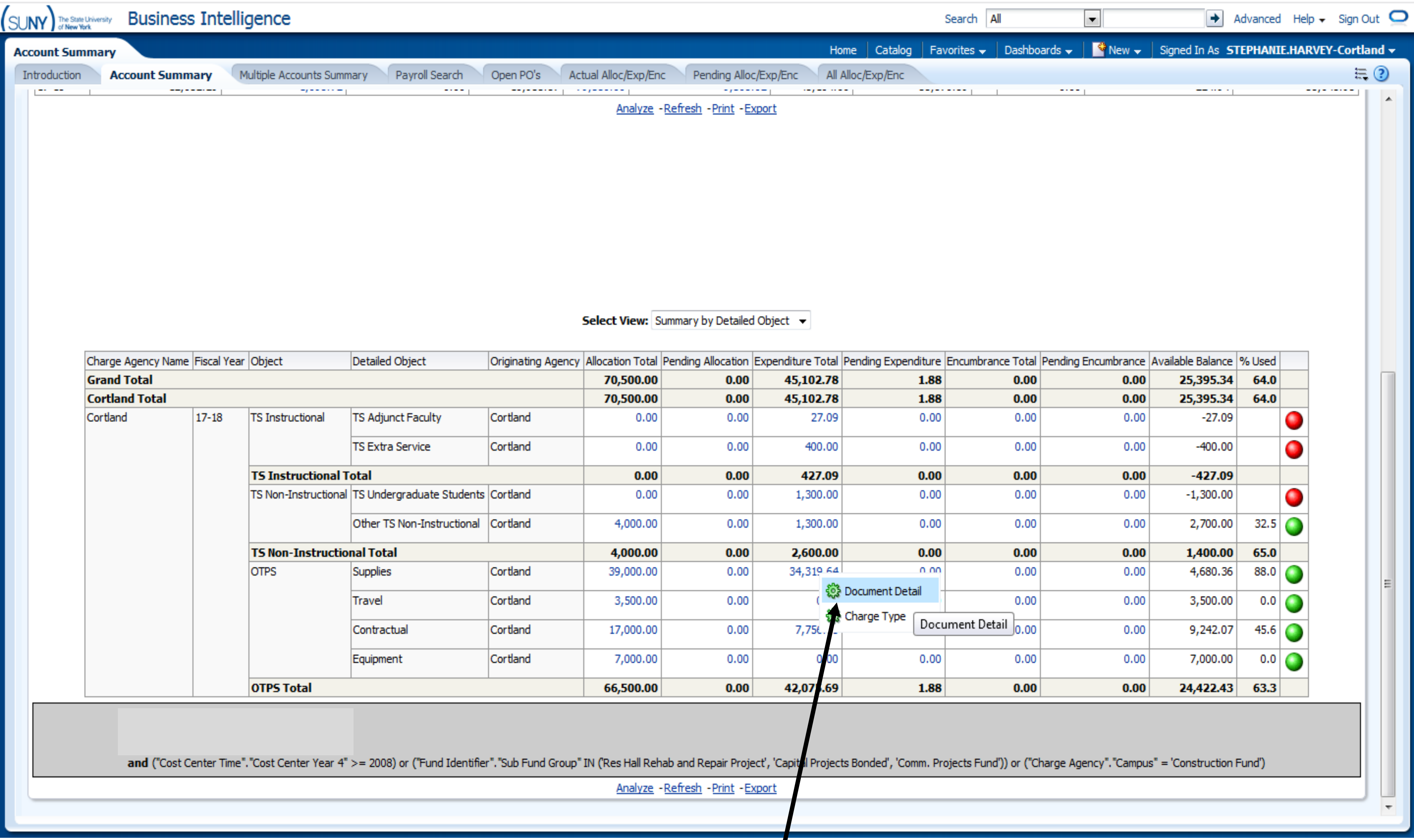
Click apply when finished.

*The other fields can be left empty, no additional information is required.

EXAMPLE:



Once your account information appears, click the drop down and select 'Summary by Detailed Object'



Charge Agency Name	Fiscal Year	Object	Detailed Object	Originating Agency	Allocation Total	Pending Allocation	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
Grand Total					**70,500.00**	**0.00**	**45,102.78**	**1.88**	**0.00**	**0.00**	**25,395.34**	**64.0**
Cortland Total					**70,500.00**	**0.00**	**45,102.78**	**1.88**	**0.00**	**0.00**	**25,395.34**	**64.0**
Cortland	17-18	TS Instructional	TS Adjunct Faculty	Cortland	0.00	0.00	27.09	0.00	0.00	0.00	-27.09	
			TS Extra Service	Cortland	0.00	0.00	400.00	0.00	0.00	0.00	-400.00	
		TS Instructional Total			**0.00**	**0.00**	**427.09**	**0.00**	**0.00**	**0.00**	**-427.09**	
		TS Non-Instructional	TS Undergraduate Students	Cortland	0.00	0.00	1,300.00	0.00	0.00	0.00	-1,300.00	
			Other TS Non-Instructional	Cortland	4,000.00	0.00	1,300.00	0.00	0.00	0.00	2,700.00	32.5
		TS Non-Instructional Total			**4,000.00**	**0.00**	**2,600.00**	**0.00**	**0.00**	**0.00**	**1,400.00**	**65.0**
		OTPS	Supplies	Cortland	39,000.00	0.00	34,319.64	0.00	0.00	0.00	4,680.36	88.0
			Travel	Cortland	3,500.00	0.00	[illegible]	[illegible]	0.00	0.00	3,500.00	0.0
			Contractual	Cortland	17,000.00	0.00	[illegible]	[illegible]	0.00	0.00	9,242.07	45.6
			Equipment	Cortland	7,000.00	0.00	[illegible]	0.00	0.00	0.00	7,000.00	0.0
		OTPS Total			**66,500.00**	**0.00**	**[illegible]**	**1.88**	**0.00**	**0.00**	**24,422.43**	**63.3**

To view more detail, click on the expenditure total and select document detail.

Document Detail – Supplies

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Search All

Account Summary

Home | Catalog | Favorites | Dashboards | New | Signed In As

Campus	Transaction Date	Transaction Code	Transaction Desc	Document Number	Vendor	Procurement Number	Requisition Number	Check Number	Account	Subobject	Amount
Grand Total											**34,319.64**
Cortland	10/05/2017	304A	AUXILIARY SERVICES CORPORATION	EB13096	AUXILIARY SERVICES CORPORATION	017314		05834957	900074	3400	12,012.00
Cortland	09/08/2017	319J	DOLLAR TREE	W598670	NO VENDOR				900074	3095	38.00
Cortland	09/08/2017	319J	STAPLES 00112359	W598670	NO VENDOR				900074	3001	17.75
Cortland	09/08/2017	319J	WM SUPERCENTER #1781	W598670	NO VENDOR				900074	3400	68.92
Cortland	09/08/2017	319J	WM SUPERCENTER #1781	W598670	NO VENDOR				900074	3400	2.24
Cortland	09/08/2017	319J	WM SUPERCENTER #1781	W598670	NO VENDOR				900074	3400	8.80
Cortland	09/05/2017	304A	AUXILIARY SERVICES CORPORATION	EA46292	AUXILIARY SERVICES CORPORATION	017143		05761195	900074	3400	462.00
Cortland	09/05/2017	304A	AUXILIARY SERVICES CORPORATION	EA46297	AUXILIARY SERVICES CORPORATION	017143		05761195	900074	3400	13,728.00
Cortland	09/05/2017	304A	AUXILIARY SERVICES CORPORATION	EA46301	AUXILIARY SERVICES CORPORATION	017143		05761195	900074	3400	7,150.00
Cortland	08/29/2017	319J	Science Vehicle Exp. - August. 2017	WA33062	NO VENDOR				900074	3563	100.05
Cortland	08/24/2017	319J	Vehicle Exp. July 2017	WA20263	NO VENDOR				900074	3563	731.88

Charge Agency Name is equal to / is in **Cortland**

Return - Analyze - Refresh - Print - Export - Create Bookmark Link

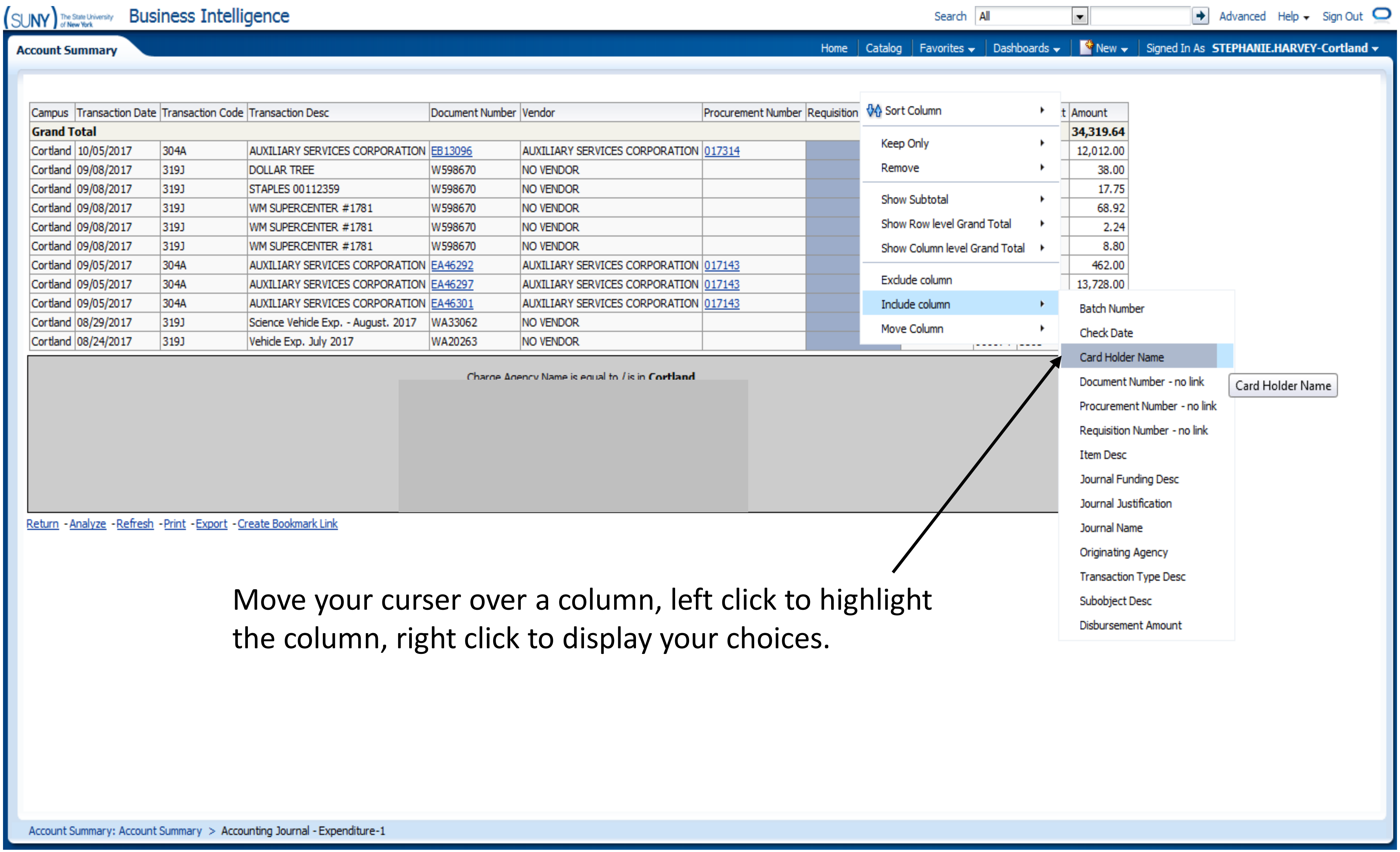
If a PO is listed you can click on the PO # to see the PO detail.

To return to the main account screen, use this return link instead of the back arrow at the top of the screen.
There is also a print link and an export link.

You can also use these links to go back to previous screens

Account Summary: Account Summary > Accounting Journal - Expenditure-1

Including and Excluding Columns within Document Detail



Move your curser over a column, left click to highlight the column, right click to display your choices.

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Search All Advanced Help Sign Out

Account Summary

Home Catalog Favorites Dashboards New Signed In As STEPHANIE.HARVEY-Cortland

Introduction | Account Summary | Multiple Accounts Summary | Payroll Search | Open PO's | Actual Alloc/Exp/Enc | Pending Alloc/Exp/Enc | All Alloc/Exp/Enc

Analyze - Refresh - Print - Export

Select View: Summary by Detailed Object

Charge Agency Name	Fiscal Year	Object	Detailed Object	Originating Agency	Allocation Total	Pending Allocation	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used	
Grand Total					**70,500.00**	**0.00**	**45,102.78**	**1.88**	**0.00**	**0.00**	**25,395.34**	**64.0**	
Cortland Total					**70,500.00**	**0.00**	**45,102.78**	**1.88**	**0.00**	**0.00**	**25,395.34**	**64.0**	
Cortland	17-18	TS Instructional	TS Adjunct Faculty	Cortland	0.00	0.00	27.09	0.00	0.00	0.00	-27.09		
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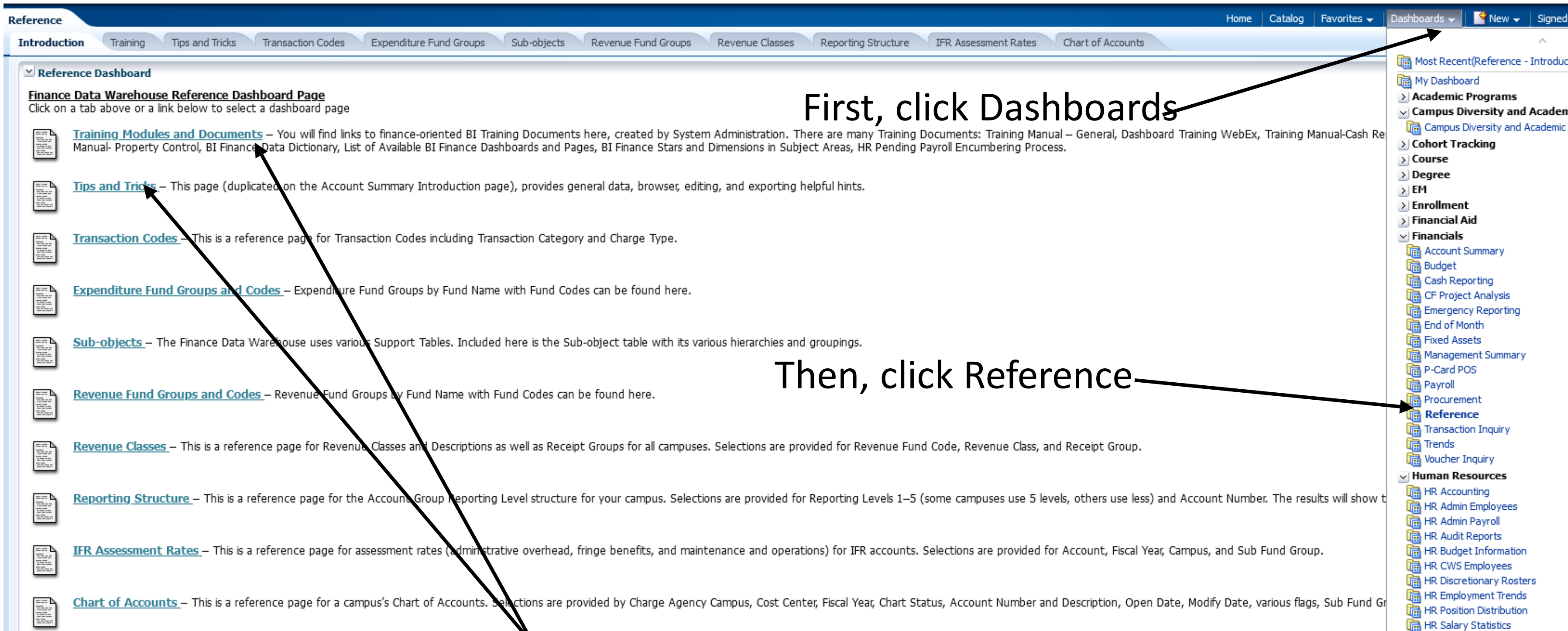
		TS Instructional Total			**0.00**	**0.00**	**427.09**	**0.00**	**0.00**	**0.00**	**-427.09**		
		TS Non-Instructional	TS Undergraduate Students	Cortland	0.00	0.00	1,300.00	0.00	0.00	0.00	-1,300.00		
			Other TS Non-Instructional	Cortland	4,000.00	0.00	1,300.00	0.00	0.00	0.00	2,700.00	32.5	
		TS Non-Instructional Total			**4,000.00**	**0.00**	**2,600.00**	**0.00**	**0.00**	**0.00**	**1,400.00**	**65.0**	
		OTPS	Supplies	Cortland	39,000.00	0.00	34,319.64	0.00	0.00	0.00	4,680.36	88.0	
			Travel	Cortland	3,500.00	0.00	0.00	0.00	0.00	0.00	3,500.00	0.0	
			Contractual	Cortland	17,000.00	0.00	7,756.05	1.88	0.00	0.00	9,242.07	45.6	
			Equipment	Cortland	7,000.00	0.00	0.00	0.00	0.00	0.00	7,000.00	0.0	
		OTPS Total			**66,500.00**	**0.00**	**42,075.69**	**1.88**	**0.00**	**0.00**	**24,422.43**	**63.3**	

and ("Cost Center Time"."Cost Center Year 4" >= 2008) or ("Fund Identifier"."Sub Fund Group" IN ('Res Hall Rehab and Repair Project', 'Capital Projects Bonded', 'Comm. Projects Fund')) or ("Charge Agency"."Campus" = 'Construction Fund')

Analyze - Refresh - Print - Export

This is where the current available OTPS balance is displayed. The available balance should never be negative. If your available is negative, review all expenditures to ensure they are true and accurate to the account.

Extra Training Modules, Tips and Tricks Dashboards



Lastly, this page will give you a variety of links with additional training modules, documents, tips and tricks, along with several other helpful links.

Extras & Tips

- Feel free to play around with BI and make it user friendly to you.
  - Please contact either Jody Maroney @x2371, Jody.Maroney@cortland.edu or Stephanie Harvey @x2304, Stephanie.Harvey@cortland.edu with any questions that you have in regards to Business Intelligence or to set up a virtual training.

- Recommended:
  - Use an Excel spreadsheet to track expenses and BI to help reconcile those expenses.

State Expenses

Vendor Name	Invoice Amount	Notes/Description	Date Posted in BI
Ex. Vendor ABC	*$ 500.00*	*Ex. Conference DEF*	*6/5/2025*