

Quick Guide to Business Intelligence (BI)

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

Log onto myRedDragon to get started

The screenshot shows the SUNY Cortland myRedDragon website. The top navigation bar includes the SUNY Cortland logo, the text "myRedDragon", and menu items for Home, Tech Help, Library, Academics, Faculty/Staff, and Campus Life. A user greeting "Welcome Stephanie Harvey" is visible in the top right corner, along with Home and Sign Out links.

The main content area is divided into several sections:

- About Me:** Displays the user's profile for Stephanie Harvey, including contact information (Miller Building, Room 335, 607-753-2304), a photo, and a title of Financial Assistant in the Budget Office. It includes a "Select a scope of view" dropdown set to "Public" and a link to "Update/Edit Your Directory".
- Faculty/Staff Directory:** Features a search box with "Search" and "Clear" buttons. A note states: "Note: You can search by part or all of a person's last name, or department."
- The Cortland eLearning System:** Lists several links: Blackboard Courses and Organizations, Blackboard Tutorials, Blackboard Help, Blackboard Organizations Request Form, Blackboard Course Retention, Design Help, Section Merge Form, and Course Teacher Evaluations (CTE).
- Important Links:** Contains "SUNY Resources" (SUNY Portal Logon, HR Services/TAS, Confluence) and "myRedDragon Resources" (Self Service Banner, Online Employment System, Welcoming Team Signup, Online Training, Information Security Training, Advertise Rental Property). A large arrow points to the "SUNY Portal Logon" link with the text "Click on SUNY Portal Logon".
- Campus Parking:** Includes a "Parking Department" section with a link to the "Parking Management System" and a list of actions: Manage/Purchase a parking permit, Pay/Lookup a parking violation, and Appeal a parking violation.
- Search Information:** A section for campus invited candidate letters and resumes, with a note that personal information has been redacted.
- Associate Vice President for Institutional Advancement Candidates:** Lists "Brando, Elizabeth" (Nov. 28, 2016).

A vertical "myRedDragon Feedback" button is located on the right side of the page.

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

Business Systems Applications

E-Business Services

Enrollment Management

Specialty Websites

More >>

[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

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?](#)

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

(Results open in a new window)



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

Fixed Reports Menu

- [\(+ Expand All](#) [\(-\) Collapse All](#)
- [Accounting Reports \(+\)](#)
- [Budget Reports \(+\)](#)
- [Human Resources \(+\)](#)
- [IPEDS HR Reports \(+\)](#)
- [RRC Data Download Center \(+\)](#)

Click Business Intelligence

Fixed Reports Details

Accounting Reports

CORTLAND COLLEGE

:: Daily Batch Control List

This report name has no reports at this time.

:: CER Reports

	Date
>> F1516_NOV16.pdf	12/05/2016
>> F1617_NOV16.pdf	12/05/2016
>> F1617_OCT16.pdf	11/03/2016
>> F1516_OCT16.pdf	11/03/2016

:: Campus Managerial Reporting System

	Date
>> WEEKLY_D102716.pdf	10/31/2016
>> WEEKLY_D102716.txt	10/31/2016
>> WEEKLY_D102016.txt	10/24/2016
>> WEEKLY_D102016.pdf	10/24/2016
>> WEEKLY_D101316.txt	10/17/2016

more Reports >>

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 >>



Expand all Collapse all

Academic Programs

- Graduate Programs
- Undergraduate Programs

Finance

- SMRT - SUNY Management Resource Tool

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- Report Types
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- 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.



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SMaRT Portal Feedback

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SUNY Publications

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- 2015 Annual Financial Report [\(.pdf\)](#) [\(.txt\)](#)
- 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 [\(.pdf\)](#) [\(.txt\)](#)
- Operating Budget Manual [\(.pdf\)](#) [\(.txt\)](#)

more Publications >>

Click Dashboards



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

The screenshot shows the Business Intelligence home page. At the top left is the SUNY logo with the text 'The State University of New York' and 'Business Intelligence'. On the top right, there are links for 'Help', 'Sign Out', and a user profile 'Signed In As STEPHANIE.HARVEY-Cortland'. Below the header is a navigation bar with 'Home', 'Dashboards', and 'Signed In As STEPHANIE.HARVEY-Cortland'. The main content area is divided into several sections:

- Create...:** Contains a 'Published Reporting Report Job' link.
- Browse/Manage...:** An empty section.
- Get Started...:** Contains links for 'Introduction to Oracle BI', 'Oracle BI EE Documentation', 'Download BI Desktop Tools', 'Help Contents', and 'Oracle Technology Network'.
- Recent:** A section with a clock icon, containing three sub-sections:
 - Dashboards:** A grid of dashboard cards, each with an icon, title, and 'Open | More' link. Titles include 'Account Summary - Account Su...', 'Account Summary - Introduction', 'Account Summary - Payroll Sea...', 'Management Summary - Manag...', 'Management Summary - Introd...', and 'Account Summary - Pending All...'.
 - More Dashboards:** A dropdown menu.
 - Others:** A grid of report cards with titles like 'Accounting Journal - Expenditu...', 'Payroll Transaction Summary-1', 'Expenditure by Line', 'Distribution by Line', 'Accounting Journal - Pending E...', and 'Accounting Journal - Pending E...'.
- Most Popular:** A section with a flame icon, containing a grid of report cards with titles like 'Account Summary - Account Su...', 'Account Summary - Introduction', 'Accounting Journal - Expenditu...', 'Account Summary - Multiple Ac...', 'Accounting Journal - Allocation-1', and 'Payroll Transaction Summary-1'.

Create...

- Published Reporting Report Job

Browse/Manage...

Get Started...

- Introduction to Oracle BI
- Oracle BI EE Documentation
- Download BI Desktop Tools
- Help Contents
- Oracle Technology Network

Recent

Dashboards

- Accour Open |
- Manag Open |

More Dashbo:

Others

- Accour Open |
- Distrib Open | More

Most Popular

- Account Summary - Account Su... Open | More
- Account Summary - Introduction Open | More
- Account Summary - Multiple Ac... Open | More
- Accounting Journal - Allocation-1 Open | More

Select the drop down arrow next to Dashboards

Then

Select Account Summary

Most Recent(Account Summary - Account Summary)

- Academic Programs
- Cohort Tracking
- Course
- Degree
- Enrollment
- Financials
 - Account Summary
 - CF Project Analysis
 - IFR Cash
 - Management Summary
 - Payroll
 - Reference
 - Transaction Inquiry
 - Trends
- Human Resources
 - HR Admin Employees
 - HR Admin Payroll
 - HR Audit Reports
 - HR CWS Employees
 - HR Employment Trends
 - HR Position Distribution
 - HR Salary Statistics
 - HR Student Employees
 - HR Support Tables
 - HR U-Wide Salary Comparison
 - HR UUP Service
 - HR Workforce Statistics/Demographics
- Identity Mgmt
- Legislative Data
- Procurement
- SIRIS Submissions
- Training
- Transfer
- Transfer Mobility

Account Summary

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

Account Summary

Account Summary Dashboard Page
Click on a tab above to select a dashboard page

Account Summary – This page allows the user to view Account Summary information by Account and Fiscal Year with the ability to drill down to the detail record level. Selections are provided by Account Number, Fiscal Year, Campus, Sub Fund Group and Reporting Levels. Entry of Account Number determines the selection list of Fiscal Years and campuses.

Multiple Accounts Summary – This page has the same functionality as the preceding page except it allows multiple, explicit Account Numbers to be entered. Summary information by Accounts and Fiscal Year with the ability to drill down to the detail record level. Payroll detail is restricted to users with payroll-viewing permission. Entry of Account Numbers determines the selection list of Fiscal Years and campuses.

Payroll Search - This page is restricted to users with payroll-viewing permission. It allows the user to view Payroll information by Account and Fiscal Year. Selections are provided by Employee Name, Pay Period, Payroll Agency, Subobject and Reporting Levels.

Open PO's – This page allows the user to view Open PO's. Selections are provided by Account Number, Fiscal year and Campus.

Actual Alloc/Exp/Enc - This page allows the user to view Actual Transactions by Transaction Category (Allocations, Expenditures, and Encumbrances). Selections are provided by Month, Campus, Cost Center, Transaction Date range, Charge Type, Sub Fund Group, Subobject Range, Sub Object Group, Vendor Name, Transaction Code, Procurement Number, Requisition Number, Check Number and Reporting Levels.

Pending Alloc/Exp/Enc - This page allows the user to view Pending Transactions by Transaction Category (Allocations, Expenditures, and Encumbrance). Selections are provided by Month, Campus, Cost Center, Pending Transaction Date range, Charge Type, Sub Fund Group, Subobject range, Object levels, Pending Vendor Description, and Reporting Levels.

All Alloc/Exp/Enc – This page allows the user to view All Transactions by Transaction Category (Allocations, Expenditures, and Encumbrances). Selections are provided by Campus, Transaction Date, Charge Type, Sub Fund Group, Subobject, Object levels, Transaction Desc, Transaction Code, Document Number, Procurement Number, and Reporting Levels.

Tips and 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
- When searching by Account Number, always use the 6 digit Account Number unless you want to view a specific Sub Account, then enter 6 + 2 digits in form: XXXXXXX-XXXX
- It is not necessary to populate every parameter before clicking *Apply*

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.

Selections

Account begins with Fiscal Year

Campus Cost Center Month Desc Sub Fund Group

Reporting Level 1 Reporting Level 2 Reporting Level 3 Reporting Level 4 Reporting Level 5

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 specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.

Fiscal Year is equal to 16-17
and Account begins with 000000

[Refresh](#)

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

[Analyze](#) - [Refresh](#) - [Print](#) - [Export](#)

Select View: Summary by Detailed Object [dropdown]

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	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	3,500.00	0.00	0.00	0.00	3,500.00	0.0	
			Contractual	Cortland	17,000.00	0.00	7,756.27	0.00	0.00	0.00	9,243.73	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	42,075.91	1.88	0.00	0.00	24,422.43	63.3	

Document Detail
 Charge Type Document Detail

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](#)

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

Document Detail – Supplies

 The State University of New York **Business Intelligence** Search

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	Subsubject	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](#)

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

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

Including and Excluding Columns within Document Detail

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

- Sort Column [dropdown]
- Keep Only [dropdown]
- Remove [dropdown]
- Show Subtotal [dropdown]
- Show Row level Grand Total [dropdown]
- Show Column level Grand Total [dropdown]
- Exclude column [dropdown]
- Include column [dropdown]
- Move Column [dropdown]

- Batch Number
- Check Date
- Card Holder Name
- Document Number - no link
- Procurement Number - no link
- Requisition Number - no link
- Item Desc
- Journal Funding Desc
- Journal Justification
- Journal Name
- Originating Agency
- Transaction Type Desc
- Subject Desc
- Disbursement Amount

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

[Return](#) - [Analyze](#) - [Refresh](#) - [Print](#) - [Export](#) - [Create Bookmark Link](#)

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

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		
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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	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	4,680.36	88.0	●		
			Travel	Cortland	3,500.00	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	9,242.07	45.6	●		
			Equipment	Cortland	7,000.00	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

Reference Home Catalog Favorites Dashboards New Signed In

Introduction Training Tips and Tricks Transaction Codes Expenditure Fund Groups Sub-objects Revenue Fund Groups Revenue Classes Reporting Structure IFR Assessment Rates Chart of Accounts

Reference Dashboard

Finance Data Warehouse Reference Dashboard Page
Click on a tab above or a link below to select a dashboard page.

- [Training Modules and Documents](#) – You will find links to finance-oriented BI Training Documents here, created by System Administration. There are many Training Documents: Training Manual – General, Dashboard Training WebEx, Training Manual-Cash Re Manual- Property Control, BI Finance Data Dictionary, List of Available BI Finance Dashboards and Pages, BI Finance Stars and Dimensions in Subject Areas, HR Pending Payroll Encumbering Process.
- [Tips and Tricks](#) – This page (duplicated on the Account Summary Introduction page), provides general data, browser, editing, and exporting helpful hints.
- [Transaction Codes](#) – This is a reference page for Transaction Codes including Transaction Category and Charge Type.
- [Expenditure Fund Groups and Codes](#) – Expenditure Fund Groups by Fund Name with Fund Codes can be found here.
- [Sub-objects](#) – The Finance Data Warehouse uses various Support Tables. Included here is the Sub-object table with its various hierarchies and groupings.
- [Revenue Fund Groups and Codes](#) – Revenue Fund Groups by Fund Name with Fund Codes can be found here.
- [Revenue Classes](#) – This is a reference page for Revenue Classes and Descriptions as well as Receipt Groups for all campuses. Selections are provided for Revenue Fund Code, Revenue Class, and Receipt Group.
- [Reporting Structure](#) – This is a reference page for the Account Group Reporting Level structure for your campus. Selections are provided for Reporting Levels 1–5 (some campuses use 5 levels, others use less) and Account Number. The results will show t
- [IFR Assessment Rates](#) – This is a reference page for assessment rates (administrative overhead, fringe benefits, and maintenance and operations) for IFR accounts. Selections are provided for Account, Fiscal Year, Campus, and Sub Fund Group.
- [Chart of Accounts](#) – This is a reference page for a campus's Chart of Accounts. Selections are provided by Charge Agency Campus, Cost Center, Fiscal Year, Chart Status, Account Number and Description, Open Date, Modify Date, various flags, Sub Fund Gr

First, click Dashboards

Then, click Reference

Most Recent(Reference - Introduction
My Dashboard
Academic Programs
Campus Diversity and Academic Prc
Campus Diversity and Academic Prc
Cohort Tracking
Course
Degree
EM
Enrollment
Financial Aid
Financials
Account Summary
Budget
Cash Reporting
CF Project Analysis
Emergency Reporting
End of Month
Fixed Assets
Management Summary
P-Card POS
Payroll
Procurement
Reference
Transaction Inquiry
Trends
Voucher Inquiry
Human Resources
HR Accounting
HR Admin Employees
HR Admin Payroll
HR Audit Reports
HR Budget Information
HR CWS Employees
HR Discretionary Rosters
HR Employment Trends
HR Position Distribution
HR Salary Statistics

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.

<u>State Expenses</u>			
Vendor Name ▼	Invoice Amount ▼	Notes/Description ▼	Date Posted in BI ▼
<i>Ex. Vendor ABC</i>	<i>\$ 500.00</i>	<i>Ex. Conference DEF</i>	<i>6/5/2025</i>