



BUFFALO STATE
The State University of New York

Human Resource Management Business Intelligence Reporting



User Guide

What is business intelligence?

Business Intelligence (BI) is a tool that uses dashboards (compilation of reports) for reporting and trend analysis over payroll periods or years.

SUNY created a BI tool to help campuses facilitate strategic and operational decision-making at the campus level by providing access to information to enable the effective and efficient management and utilization of resources. BI dashboards exist for human resources, financials, enrollment, academics, etc.

BI HR (human resources) provides **administrators** access to human resource information in the **HR Admin Employees Exec** dashboard to plan, forecast, and manage their employees.

Quick Steps to Run a Report in BI HR:

1. Select a payroll period
2. Select a report
3. View or edit report in dashboard, export, or export and edit externally (using Excel)

Analyzing Data

If you have any questions on interpreting or analyzing the data contained in the reports, please contact Lydia Kawaler, Human Resource Management Office, for assistance at ext. 4822 or kawalel@buffalostate.edu.

Human Resource Management information and resources is available in the **Human Resource Management Procedures Manual**, <http://hr.buffalostate.edu/hrm-procedures-manual>, and includes details on:

- appointment types
- budget titles
- bargaining (negotiating) units
- renewal/non-renewal notice requirements (UUP)
- salary schedules
- leaves
- separations

Types of BI HR Reports Available to Administrators

Appointments

List of current employees and their appointment information:

name, budget title, campus title, salary grade, department, line number, appt eff date, appt end date, campus date, negotiating unit, appt type, pay basis, FTE, salary, supervisor, email, search waiver indicator, account, account description, NYS ID, SUNY ID

Salary

List of current employees and their salary and additional salary information:

name, budget title, salary grade, department, line number, negotiating unit, pay basis, FTE, salary, account, sub account, account description, fund code, chair stipend, also receives, geographic amount, shift differential amount, NYS ID, SUNY ID

Title / Dates

List of current employees and their various employment dates:

name, budget title, campus title, salary grade, line number, FT/PT indicator, department, SUNY date, state date, title date, grade date, campus date, years at campus, notice date, continuing or permanent date, appt type, supervisor, NYS ID, SUNY ID

Appointments by Account

List of current employees and their primary and secondary account information:

name, line number, budget title, pay basis, FTE, appt type, department, instructional indicator, accounts, fund codes, segregation code, funded/unfunded indicator, SUNY ID

Temp / Term Appointments

List of current temporary and term employees:

name, budget title, department, line number, FT/PT indicator, appt eff date, appt end date, campus date, notice date, negotiating unit, appt type, pay basis, supervisor, salary, SUNY ID

New Hires

List of employees who are new hires within the specified payroll periods:

name, action code, reason code, appt eff date, budget title, salary grade, pay basis, line number, negotiating unit, department, salary, FTE, SUNY ID

Terminations

List of employees who have separated within the specific payroll periods:

name, action code, reason code, separation date, justification (reason), budget title, campus title, pay basis, line number, negotiating unit, department, salary, accounts, SUNY ID

Leaves

List of employees who are on paid or unpaid leave for the specified payroll period:

name, action code, reason code, leave date, leave end date, leave percent, justification (reason), line number, budget title, campus title, pay basis, negotiating unit, department, salary, SUNY ID

Sign In

1. Open a web browser (Chrome or Firefox is preferred) and enter www.suny.edu/hrportal. The dashboard may also be accessed via www.suny.edu/analytics.
2. Select Buffalo State from the dropdown menu and select Log In.
3. Enter your Buffalo State NT Username and Password and select Sign In.
4. Select the BI Reports icon.
Note, some users may then need to select the BI tab and dashboards box.
5. Mouseover Dashboards, select Human Resources, then select the dashboard **HR Admin Employees Exec**.



The dashboard will appear and contains an introduction page that lists all available reports.

HR Admin Employees Exec

Introduction | Appointments | Salary | Title/Dates | Apt by Account | Temp/Term Employees | New Hires | Terminations | Leaves

HR Admin Employees Exec Dashboard Tabs Summary

HR Admin Employees Exec Dashboard Tabs
Click on a tab above to select a dashboard page

Appointments
Current Employee appointment information including name, title, department, line and supervisor.

Tips:

- If you are experiencing problems, **clear your browser cache**. For guidance, visit <https://commons.suny.edu/opensunysupport/how-to-clear-web-browser-cache-and-cookies/>
- If BI stops working due to inactivity, hit F5 to refresh or click the clockwise circular arrow at the top of the screen.

Run a Report

All data is stored by payroll periods. To run a report, users must first select a payroll period for the source of the report. Payroll period data is typically available a few days after the payroll period's check date. For example, 2017-2018 payroll 21 data is available after February 7. To identify a payroll period, view the administration payroll calendar available at <http://hr.buffalostate.edu/payroll>.

If you do not see the payroll dropdown fields as pictured below, click any report tab.

- Prompts with an asterisk (*) are required.
- Payroll Year defaults to current year and can be changed.
- Payroll Year format is yyyyyyy – e.g., 20182019
- Payroll Number defaults to zero so a report is not run when the dashboard is first opened.

Select a payroll year and number, then click **Apply**.

The screenshot shows a web form with three dropdown menus. The first is labeled 'Campus Code' and contains the value '28160'. The second is labeled '* Payroll Year' and contains the value '20172018'. The third is labeled '* Payroll Number' and contains the value '20'. The '* Payroll Number' dropdown is open, showing a list of numbers from 13 to 20. The number 20 is selected and has a checkmark next to it. An orange arrow points to the number 20. The 'Apply' button is circled in orange.

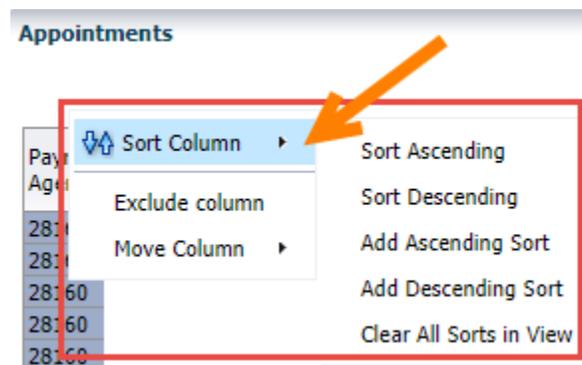
Select a **report** tab and the data output will appear.

Edit a Report in the Dashboard

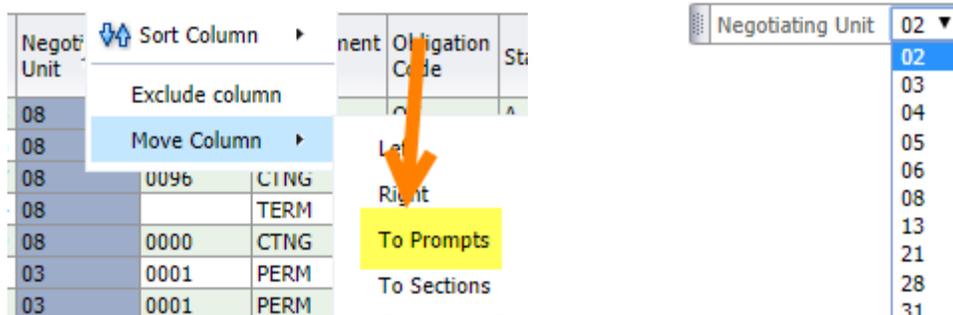
Reports can be viewed or edited in the dashboard, exported, or exported and edited externally (e.g., Excel).

The columns in a report can be sorted, excluded, or moved several ways:

- Hover over a column and right mouse click, or
- To sort ascending or descending, select the triangles on the heading.
- To move a column, click on the header until you see a double cross arrow, then drag and drop the column.



You can create a **prompt** to pull data by a value in a data field by right mouse clicking a column to view the pop-up menu, then select **To Prompts**.



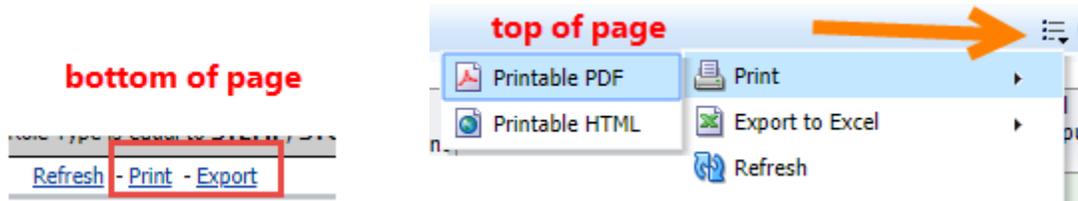
Tips:

- Select the up/down arrow at the end of a list to return all rows. 
- Click return to get back to the previous page after you have drilled down. Do not use the back button as it will take you out of BI.

Print or Export Reports

Select the desired option at the bottom of the page **OR** select the 3 lines at the top of the page. Exports can be in .PDF, Excel, CSV, or printable HTML, etc. To retain all formatting, select Excel. To obtain data only, select CSV. **Note, the Print option will only print the current page.**

To export the entire report, select Export on the bottom of the page. It will export the entire report even if only the first 25 rows appear on the screen.



Sign Out

When you are finished, select **Sign Out** in the upper right-hand corner of your screen.