What is AnalyzeNY?

AnalyzeNY is the Statewide Data Warehouse combining data from multiple sources to improve the State's analytical reporting capabilities. The current data sources include the Statewide Financial System (SFS), NYS Personnel System (NYSTEP) and Payroll (PayServ Master File). AnalyzeNY – Financials is reporting on SFS data and Workforce Analytics is a combination of NYSTEP and Payroll.

How do I access AnalyzeNY?

You can navigate several different ways:

- analyzeny.ny.gov
- My.ny.gov
- SFS Homepage (www.sfs.ny.gov) or SFS Secure. – If you have access to SFS Financials

AnalyzeNY utilizes NY.Gov user ID and passwords for authentication. These are the same credentials for SLMS.

Workforce Analytics

Data from NYSTEP is joined to data from the PayServ Masterfile every two weeks as the pay cycle is complete. The data will not reflect retroactive changes to an employee's personnel record which were not in place when the pay check was paid. If there are differences between the systems both records are recorded. The employee FTE(Full Time Equivalent) is carried only on the record coming from the PayServ Masterfile.

What reports are available?

Report	Data Available	Report Description	Security
WF146 – Workforce Profile	Workforce Analytics – Personnel	Snapshot of the workforce for an agency or group of agencies for a selected pay period. This can be run for one or multiple agencies, including statewide. Users with detail data access have the ability to drill down their agency's employee listing.	NY.Gov = Workforce Analytics, All access types; Users with Detailed data access have the ability to drill down to employee listing for their agency.
WF280 – FTE - Employee Count	Workforce Analytics – Personnel	Aggregate FTE and employee counts for user selected groupings by one or more agencies and by pay period(s). Users have the ability to change the display of the column groupings. Users with Detailed data access can drill down their agency's employee listing.	NY.Gov = Workforce Analytics, All access types; Users with Detailed data access have the ability to drill down to the employee data of their agency.
WF326 – Employee History	Workforce Analytics – Personnel	An employee's history displayed across multiple pay periods, which enables the user to see when employees had personnel movements. Users have the ability to add/remove/reorder columns.	NY.Gov = Workforce Analytics; Users with Detailed data access will have access to employees in their agency.

Report	Data Available	Report Description	Security
WF373 – Position History	Workforce Analytics – Personnel	Displays a positions detail across multiple pay periods; Includes information on Incumbents of the position and an indicator of when a position was vacant. Users have the ability to add/remove/reorder columns.	NY.Gov = Workforce Analytics; Users with Detailed data access will have access to positions in their agency.
WF402 – Employee Listing	Workforce Analytics - Personnel	An agency listing based on multiple selections including a selected pay period. Users have the ability to add/remove/reorder columns.	NY.Gov = Workforce Analytics; Users with Detailed data access will have access to their agencies data.
WF662 – Payments and Hours	Workforce Analytics - Payroll	Displays aggregate payments and/or hours based on selections. Users can define the column groupings on the report. Users have the ability to change the display of the column groupings. Users with Detailed data access can drill down their agency's employee listing. Users have the ability to change the display of the column groupings.	NY.Gov = Workforce Analytics, All access types; Users with Detailed data access have the ability to drill down to the employee data of their agency.
WF811 – Employee Payments and Hours Listing	Workforce Analytics - Payroll	An agency listing, including payment codes, amounts and hours, based on multiple selections by a selected pay period. Users have the ability to add/remove/reorder columns.	NY.Gov = Workforce Analytics; Users with Detailed data access will have access to their agencies data.
WF883 – Retirement Planning	Workforce Analytics - Personnel	A count of retirement eligible employees based on different time frames. Retirement eligibility is calculated based on an employee's years of service credit in the Employee Retirement Service and their age. Users have the ability to change the display of the column groupings. Users with Detailed data access can drill down their agency's employee listing.	NY.Gov = Workforce Analytics, All access types; Users with Detailed data access have the ability to drill down to the employee data of their agency.

What else is coming in AnalyzeNY?

- **Workforce Analytics**: reporting on NYSTEP attrition data. This will assist agencies (DOB and executive agencies) in succession planning.

  We are open to suggestions for new reports, feel free to email the WFA email address (CS.sm.WorkforceAnalyticsSystem@cs.ny.gov) or ITS AnalyzeNY email (its.dl.analyzeny@its.ny.gov) with suggestions.

- **Financials:** improving contract and vendor management. This will assist agencies (DOB and executive agencies) to better manage their procurement contracts. Ten agencies, including DOB, have participated in three requirements sessions. Over 40 report requirements gathered.

- **LATS-NY:** reporting on time and attendance data for agencies in the BSC hosted LATS-NY system. This will assist BSC hosted agencies on better understanding how their staff is not only using their accruals but also hours worked in different areas.

Landing Page: Brief intro to what is on the page.

Highlight the 4 sections:

Data Sets: Financials and LATS- Under Construction

Submit a Request

Help

About

Road Map

Workforce Analytics Tile

Same as ion Landing Page: Submit a Request and Help

Help – Documents under this tab:

- AnalyzeNY User Guide
- Report User Guides
- Report Catalog
- Data Dictionary
- Training – recorded Demonstration
- Webinar and training material are also available on the Civil Service website: https://www.cs.ny.gov/businesssuite/Publications-and-Forms/Manuals/

Employee Reports:

- How access level will affect what you see:

- **Report descriptions**
- **Breadcrumbs**

Payroll Reports:

Payroll Reports

WF662 - Payments and Hours **All**

WF811 - Employee Payments/Hours Listing
Detail

- **Breadcrumbs**

Workforce Profile

Prompts

This section is used to filter your results based on the specific criteria pertaining to your data request.

- Most prompts will limit the values in other drop-down boxes based on agency
- After in any change in the Prompt section the **Apply** button must be hit to have changes reflected in the report.

Suggested Tips:

- Use the '*Reset'* button to apply default values. Since all prompt choices filter other drop-down boxes, it can be cumbersome to de-select choices as you want to adjust your results. Use the Reset Button to make it easier.
- If you know the code or description of the field, you can scroll through the choices listed OR use the '*Search'* function in the prompt drop down:
    - Enter the code or description
    - De-select '*Match Case'*
    - In the '*Name*' drop down, choose '*Contains*'
    - Hit **'Enter'** to start the search
  - Potential matches will be listed below. To choose from the list:
    - Click to highlight your selection
    - Click the right arrow
        - This will move your selection to the '*Selected'* pane
    - Continue searching for values you need
    - When all selections are made, click '*OK'*
    - Selections will now be displayed in the prompt area

Required prompts:

Agency vs Individual Agency
Pay Period: Naming Convention, Multiple on aggregate reports

Collapse the Prompt Section

It is recommended to collapse the prompt section when printing your report. Also, it allows more viewing space for report content.

1. Click the small minus sign in the top right corner of the prompt area
2. This will collapse the prompt section.
3. To view prompts again, click on the small plus sign to expand the section.

How to Print

To print your report:

1. Click on the Page Options icon ( ) in the upper right hand corner of the dashboard
2. Select Print > Printable PDF.
3. Print the document in Adobe Reader.

IMPORTANT:

In the Adobe Reader print dialog box, ensure that "Shrink Oversized Pages" is selected and "Choose paper source by PDF page size" is unselected.
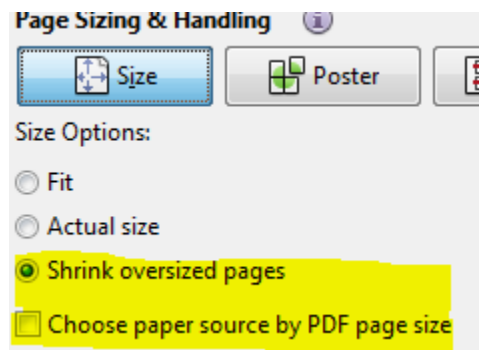
How to Export to Excel

All reports are exportable to Excel.

1. Scroll to the bottom of the report.
2. Click on the 'Export' hyperlink.
3. Click 'Open' in your browser.
4. In Excel, a pop-up message will appear informing you that the file types do not match. Click 'Yes' to open the file.
5. For the **Workforce Profile**, you can export an individual report following the above direction.

   To export the full report, including charts:

   1. Click on the '***Page Options***' icon ( ) in the upper right hand corner of the dashboard.
   2. Select Print > Export to Excel > Export Entire Dashboard.
   3. Print the document in Adobe Reader.

Drill downs

If you have access to detail level data, the FTE and the Number of Employee fields will have links to an Employee Listing.

   1. Click on number

2. Click on View Employee Listing

Employee Listing will filtered by the prompts and the cell data you drilled down from.

- **Breadcrumbs**

FTE – Employee Count

Prompts

- Refer to WF Analytics Data Dictionary for help on prompt fields
- Always remember that the Apply button must be hit for changes in the prompt section to be reflected in the report.

How to Work with Column Selectors

Available columns are in alphabetical order. Refer to the WF Analytics Data Dictionary for addition information on available columns.

1. Select Columns to add to the report.
2. Apply **OK** button on far right
3. If you have selected multiple pay periods they will appear in descending order

Report Display Options

Can select FTEs Only, Number of Employees Only or Both FTEs and Number of Employees.

How to Rearrange Columns

1. Select new columns through the Column Selectors.
2. Apply **OK** button on far right
   OR
1. Hover over a column header until a handle with arrows appears.
2. Click on header with handle and drag to desired position
   OR
1. Right click in a column.
2. Navigate to the 'Move column' menu.

Drill downs

If you have access to detail level data, the FTE and the Number of Employee fields will have links to an Employee Listing.

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Employee Listing will be filtered by the prompts and the cell data you drilled down from.

- **Breadcrumbs**

How to Add Additional Columns

1. Right click on a column header.
2. Navigate to the '***Include column***' menu. A list of available columns will be displayed.
3. Select the column you would like to add to your dashboard

Note: If you right click on a row rather than the column header, you will need to navigate to the last item in the menu: the name of that column. From here, you will see the menu displayed above.

How to Exclude Columns

1. Right click on the header of the column you would like to exclude.
2. Navigate to the '***Exclude column***'

Note: If you select '***Remove***' rather than '***Exclude column***', you will be filtering out *specific values* of that column rather than the column in its entirety.

How to Rearrange Columns

1. Hover over a column header until a handle with arrows appears.
2. Click on header with handle and drag to desired position

Customizations

Customizations allow the user to save prompting choices or manipulated report outputs. This is beneficial when running a report often and selecting the same prompts or when configuring the report output in a personalized way. A customization is saved at that point in time and will need to be updated when any report changes are made on the back-end. Users will be notified of such report changes when they occur.

How to Save Customizations

Customizations are any filter choices and/or manipulation that you have made within the dashboard page. These customizations are specific to the dashboard page (tab) you are on, not the entire dashboard. Saved customizations are saved for your user ID only. Sharing a customization requires administrative privileges. Any shared customization will show up below the line in the Apply Saved Customization menu; these customizations cannot be deleted.

Important: Customizations are saving a version of the dashboard **at that point in time**. Therefore, you will need to maintain and update your customizations as enhancements (for example, additional data sets are available, new filters are included in the prompt section, etc.) are made to the report because these updates **will not be picked up when you apply your saved customization**. The development team will keep users informed about changes to the dashboards and when/if customizations will be affected.

To save a customization:

1. Click on the '***Page Options***' icon ( ) in the upper right hand corner of the dashboard.
2. Select '***Save Current Customization***' from the menu.
3. In the pop-up window, give your customization a name and click **'OK'.**
4. If desired, check the "***Make this my default for this page***" to have apply this customization automatically each time you visit the dashboard page (tab). Multiple customizations can be saved per dashboard.

How to Apply Saved Customization

1. To apply a saved filter selection, also called "*customization*", click on the '*Page Options*' icon ( ) in the upper right hand corner of the OBIEE dashboard.
2. Select '*Apply Saved Customization'* from the menu.
3. From the fly out menu, select your saved customization. This customization will then be applied to your dashboard report.

How to Delete a Customization

1. Click on the Page Options icon.
2. Click on '*Edit saved customizations…*' A window will appear.
3. Click on the customization you would like to delete.
4. Click on the red '**X**' in the right hand corner of the window to delete.

How to Set a Saved Customization as Your Default View

A saved customization can be set as your default view each time you visit the dashboard tab.

1. Click on the Page Options icon.
2. Click on '*Edit saved customizations…*' A window will appear.
3. Click on the radio button in the 'My Default' column of the customization you would like as your default.
4. Click '*OK*'.

How to Share a Saved Customization with Others

A saved customization can be shared with other users. To share a customization, please email the AnalyzeNY support team (its.dl.analyzeny@its.ny.gov) with this information:

1. Your user ID
2. The user ID(s) of the individual(s) receiving your shared customization
3. Name of customization(s) you would like to share. Including the name of the report is helpful.

How to Clear Your Choices

Due to the flexible nature of OBIEE dashboards and reporting, it may be necessary to return to the default view of the dashboard page (tab).

1. Click on the '*Page Options'* icon ( ) in the upper right hand corner of the OBIEE dashboard.
2. Select '*Clear My Customization*' from the menu. This will action will remove any applied customization(s) and reset all dashboard prompts to default values.

Additional Reports:

Payments and Hours

- **Breadcrumbs**

Employee History and Position History

- Prompt requirements
- Limitations

- **Breadcrumbs**

  Retirement Planning Report

- **Breadcrumbs**

As new reports are developed we will a broadcast message on the main dashboard.

Need Help?
Refer to training materials on the Help tile:

Email its.dl.analyzeny@its.ny.gov

Need Access?
Click on Get Access at top of AnalyeNY dashboard

Access to Workforce Analytics shall be requested only for users who are substantively and regularly engaged at a professional level in workforce management.

To request access, agencies should submit an Access Request Form (one for each user), approved by the agency's data access officer and the HR director, to: CS.sm.WorkforceAnalyticsSystem@cs.ny.gov. The Access Request Form can be obtained on the Department of Civil Service's website at:
http://www.cs.ny.gov/businesssuite/docs/forms/Workforce%20Analytics%20Access%20Request%20Form.pdf