



# AnalyzeNY User Guide

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## Purpose

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This document highlights high level information about how to use AnalyzeNY and the type of data reportable in this system. All reports have been developed in Oracle Business Intelligence Enterprise Edition (OBIEE). Common user practices for OBIEE, instructions and tips are outlined below.

## AnalyzeNY Overview

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### 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. In the future, LATS – NY will be incorporated into AnalyzeNY.

AnalyzeNY was implemented and supported by Administrative and General Service (AGS) Cluster of Office of Information Technology Services (ITS). AnalyzeNY - Financials is sponsored by the Division of the Budget (DOB). AnalyzeNY - Workforce Analytics is sponsored by Department of Civil Service (DCS).

AnalyzeNY utilizes Oracle Business Intelligence Enterprise Edition (OBIEE) as the reporting tool off the data warehouse.

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### Data Source

#### Financials

Data is extracted from SFS and loaded into the data warehouse. General Ledger reports rely on all posted data from Cash, Modified Accrual or Agency Accrual ledgers. Budget reports rely on all successfully budget checked transactions in the Commitment Control Module of SFS.

Main causes of variance from SFS are timing issues. SFS reports are typically relying on a live data set while AnalyzeNY – Financials is loaded overnight and is “as of” prior business day.

#### 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.

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## Frequency of Data Updates

### Financials

Data is as of the prior business day and will typically be loaded after SFS batch processing is completed overnight. AnalyzeNY will load data as of 3:30AM if batch processing has not yet completed.

### Workforce Analytics

Data is as of the last paid pay cycle. Administrative and Institution pay checks in a pay cycle will always be loaded together. Data is loaded every two weeks when the Administrative and Institution pay checks in a pay cycle have been paid.

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## Report Functionality

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### Prompts

Every tab of the report will have a prompting section. 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
- Your choices made on one tab will carry through to all available tabs.

#### 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 adjust your results. Use the Reset Button to make it easier.
- If you know the code or description of the chartfield, 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
- Financials Reporting Trees: If you do not know where a summary node falls on the reporting tree, make selections at each level of the tree, starting at the top-most level. Your choices will filter subsequent choices. Work your way down the tree until you find the node you are interested in. Or, navigate to the tree tab you're

interested in filtering on and then utilize the 'Exportable' view. The column headers of this view will say "...Level 1", "...Level 2" and so on.

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## 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.

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## Tabs

Some reports have different reporting dynamics which can be utilized by clicking different tabs at the top of the dashboard. An example of this is the DW438 – Ad Hoc General Ledger report Ad hoc and Advanced tabs. Functionality is similar but there are more reporting options within the Advanced tab. Please see user guides for more report-specific information.

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## Financials: How to See Daily Data

All reports display monthly data by default. You have the ability to drill down to the journal date of the transaction.

1. Click on the column header of the month you would like to drill down to daily detail. A column for each date with data will now be displayed.
2. To return to a monthly view, scroll to the bottom of the report.
3. Click on the '**Return**' hyperlink.

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## Financials: How to Locate Tree Levels

If you do not know where a summary node falls on the reporting tree, make selections at each level of the tree, starting at the top-most level. Your choices will filter subsequent choices. Work your way down the tree until you find the node you are interested in. Or, navigate to the tree tab you're interested in filtering on and then utilize the 'Exportable' view. The column headers of this view will say "...Level 1", "...Level 2" and so on.

## Financials: How to Flatten a Tree for Excel

All Tree tabs have the ability to flatten a tree for better experience manipulating data in Excel.

1. In the Choose View drop down box, select '**Exportable**'.

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## 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.

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## 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.

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## 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.

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## How to Pivot Values of a Field

In addition to rearranging the order of columns, you have the ability to pivot a field's values into columns. By default, month is pivoted on all reports. Instead of month, you may have the need to have Transactional Fund or Transactional Departments listed across as columns rather than rows. Or, you may want to show years side by side.

1. Hover over a column header until a handle with arrows appears.
2. Click on header with handle and drag above or below the existing Month columns until a gray bar appears. Release click. If you chose above Month, your selected column will now span all months. If you chose below Month, month will now span all values from the new, pivoted column.
3. If you no longer want to see Month as a column:
  - a. Drag this field to the left as a regular column OR right click and Exclude month.

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## How to Add Subtotals

As you add new columns, there may be a need to subtotal on screen.

1. Right click on the column header you would like to add a subtotal.
2. Navigate to the '**Show Subtotal**' menu

3. Select where you would like the subtotals to be displayed, After Values, Before Values, At the Beginning or At the End.

**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.

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## How To Add Sections

You have the ability to section your dashboard based on the values in a selected column. For example, you may want to add Transactional Department to your Account report but don't want to see repeating values in a column. Instead, you can create sections which will add a subtitle and total for each Transactional Department in your dashboard.

1. Hover over a column header until a handle with arrows appears.
2. Click on header with handle and drag above table into the '**Sections**' area.

Here is an example of sectioning Personal Service accounts within the Division of Criminal Justice:

1090200 - DCJ-Executive Direction

	Grand Total	April	May	June	July	August	September	October
Transactional Account								
50101 - Regular Employee - Base Salary	<b>277,029</b>	40,259	40,273	40,411	62,290	33,254	39,517	21,024
50107 - Regular Employee - Lump Sum	<b>3,228</b>						3,228	
50108 - Reg Employee-Additional Comp	<b>1,323</b>	232	232	232	348	81	81	116
<b>Grand Total</b>	<b>281,580</b>	<b>40,491</b>	<b>40,505</b>	<b>40,643</b>	<b>62,639</b>	<b>33,335</b>	<b>42,827</b>	<b>21,140</b>

1090201 - DCJ-Public Information Office

	Grand Total	April	May	June	July	August	September	October
Transactional Account								
50101 - Regular Employee - Base Salary	<b>199,025</b>	29,096	28,321	28,321	42,482	28,321	28,321	14,161
<b>Grand Total</b>	<b>199,025</b>	<b>29,096</b>	<b>28,321</b>	<b>28,321</b>	<b>42,482</b>	<b>28,321</b>	<b>28,321</b>	<b>14,161</b>

1090204 - DCJ-Administrative Services

	Grand Total	April	May	June	July	August	September	October
Transactional Account								
50101 - Regular Employee - Base Salary	<b>483,299</b>	75,618	73,436	71,775	101,157	67,364	62,450	31,498
50103 - Regular Employee-Overtime	<b>61</b>			61				
50105 - Regular Employee - Standby Pay	<b>4,410</b>		1,470		1,470	717	753	
50107 - Regular Employee - Lump Sum	<b>2,914</b>							2,914
50108 - Reg Employee-Additional Comp	<b>16,500</b>	16,500						
<b>Grand Total</b>	<b>507,184</b>	<b>92,118</b>	<b>74,906</b>	<b>71,836</b>	<b>102,627</b>	<b>68,081</b>	<b>63,204</b>	<b>34,412</b>

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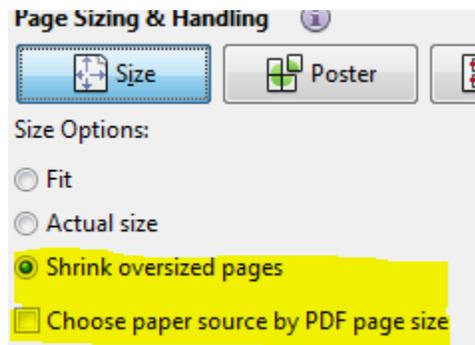
## How to Print

To print your report:

1. Click on the **Page Options** icon () in the upper right hand corner of the OBIEE 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.



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## How to Export to Excel

It is recommended to remove trees and subtotals from your report prior to exporting to Excel. To do this, select the **‘Exportable View’** on your report. This will be available via drop down box or a separate tab of the dashboard.

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.

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## 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 at this time. 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:

2. Click on the '**Page Options**' icon (  ) in the upper right hand corner of the dashboard.
3. Select '**Save Current Customization**' from the menu.
4. In the pop-up window, give your customization a name and click '**OK**'.
5. 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.

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## 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.

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## 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.

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## 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**'.

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## 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.

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## Support

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For questions, general feedback or new report requests, contact AnalyzeNY staff: [its.dl.analyzeny@its.ny.gov](mailto:its.dl.analyzeny@its.ny.gov)