Tips for Using BI (Budget and Transaction, Transaction Details, HR – GL Detail):
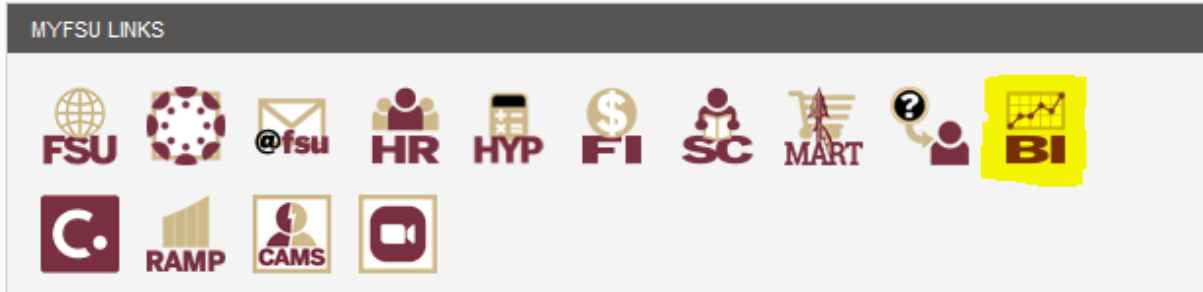
myFSU Florida State University

MYFSU LINKS

FSU | @fsu | HR | HYP | FI | SC | MART | BI

C. | RAMP | CAMS

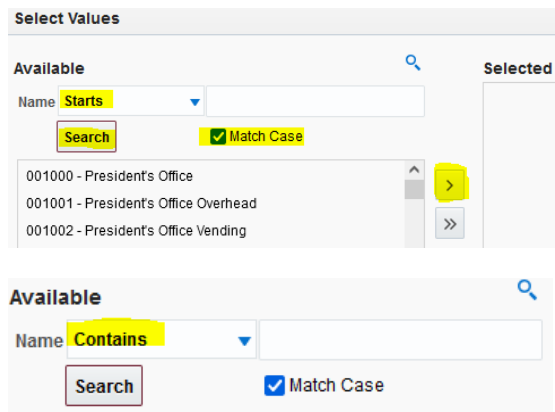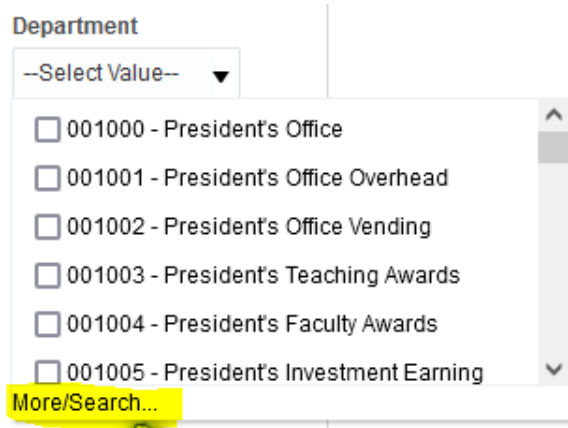Dashboards ▼　　New ▼　　Open ▼　　Signed In As

∧

⊞ Most Recent(Budget and Transaction - Executive Overview)

⊞ My Dashboard

◢ **Financial Reports**

　⊞ Available Balance

　⊞ Budget & Avail Bal PDF Reports

　⊞ **Budget and Transaction**

　⊞ Concur Expense Report Details

　⊞ Construction Ledger

　⊞ Contract & Grant Available Balance

　⊞ Departmental Ledger Review

　⊞ Dept Cash Balance Trend 12 Pd

　⊞ E&G Allocations (Recurring)

　⊞ E&G Allocations (Total)

　⊞ Encumbrance Period Balance

　⊞ Expense Data Mining

　⊞ Financials Central

　⊞ **Transaction Details**

　⊞ Trend Ledger Report

　⊞ Year End Reports

Dashboards ▼　　New ▼　　Open ▼　　Signed In As

⊞ Most Recent(Budget and Transaction - Executive Overview)

⊞ My Dashboard

▸ Financial Reports

◢ **HR Reports**

　⊞ Active Employees

　⊞ Cost Center

　⊞ Daily Wellness Check

　⊞ Employee Time Verification

　⊞ Encumbrances

　⊞ **HR - GL Detail**

　⊞ HR Average FTE

　⊞ Partial Telework Request Report

　⊞ Position Detail

　⊞ Timesheets

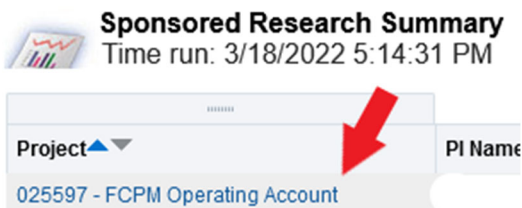# Dashboards > Financial Reports > Budget and Transaction

- Used for seeing a comprehensive list of projects in which you are the lead PI/Co-PI in your department, or searching another department ID where you are Co-PI and viewing your project.
- When selecting Department ID:
  - **Use the More/Search button** in the Department drop down field to enter the six-digit number or type the name (switch to "contains" to search by name).


  - *This list is not comprehensive, please ask for assistance if you cannot locate your project.

- 162000 - FL Public Affairs Ctr
- 162001 - FL Public Affairs Ctr Auxil
- 163000 - Pepper Inst on Aging & Pub Pol
- 163003 - Pepper Auxiliary General
- 163900 - Pepper Inst Aging FSUF
- 164000 - Economics
- 164900 - Economics FSUF
- 164901 - Economics BRIM FSUF
- 164902 - Economics QUINN FSUF
- 164903 - Hilton Cntr in Economics FSUF
- 164904 - App Master in Economics FSUF
- 165000 - Claude Pepper Center
- 166000 - Geography
- 166900 - Geography FSUF

- 167000 - Urban & Regional Planning
- 167001 - Urban & Regional Plan Auxil
- 167900 - Urban & Regional Planning FSUF
- 168000 - Political Science
- 168900 - Political Science FSUF
- 170000 - Public Administration
- 170001 - FL Center for Public Managment
- 170900 - Public Administration FSUF
- 171900 - DeVoe Moore Center FSUF
- 172000 - Sociology
- 174000 - Demography & Population Health
- 174001 - Demog & Population Health Aux
- 215000 - Civil & Environmental Engineer
- 089009 - Psychology Sponsored Projects
- 069000 - Earth, Ocean & Atmospheric Sci

- Click on the Hyperlink to view a snapshot of your project. (Allow-pop ups).

- Here you can see **active employees** on your project, **start and end dates**, **current balance** and **encumbrances**, and a **monthly trend** (near bottom of page).
- Change the view to "Accounting Period (Salary Detail)" to view expenses per month.
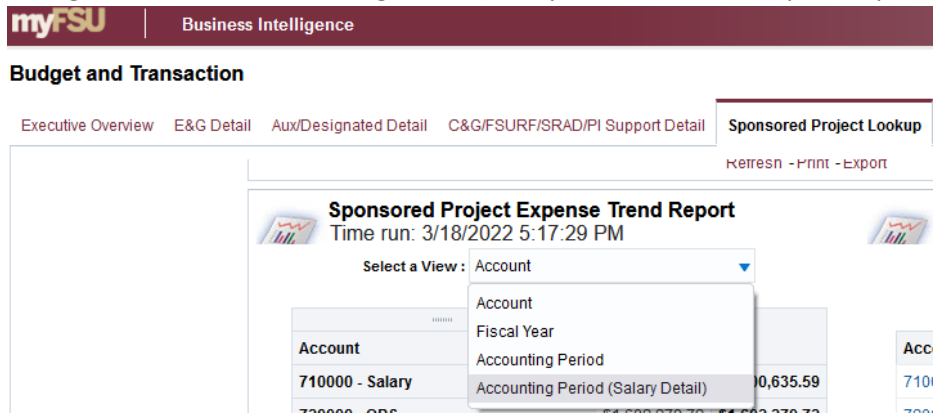
- Write down your project numbers to enter in the Transaction Details & HR-GL Detail screens.
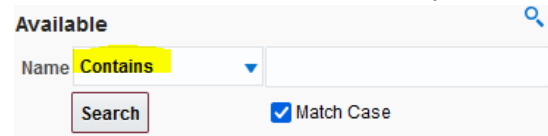
Dashboards > Financial Reports > **Transaction Details**

- Used to see individual level data for transactions such as "salary categories," travel, subcontracts, subawards, purchase orders, etc.
- Downloadable for the current month, for the duration of the project, specific periods, etc.
- When selecting Fiscal Year and Accounting Period:
  - FY 2021 Period 12 = June 2021
  - FY 2022 Period 1 = July 2021
  - FY 2022 Period 6 = December 2021
  - FY 2022 Period 12 = June 2022, etc.
  - You can select as many periods as you would like, however **do not use the (All Column Values Button).** Doing so will pull up months labeled 0 and 999. This data will not be beneficial to you.
- *Always* enter a Department ID and your project ID before searching.
  - Reference searching instructions above.
- *Failing to do so will result in long query times and an overabundance of data.*
- Can be exported to CSV and sorted. **Scroll to the bottom** of the query to find the Export Button.
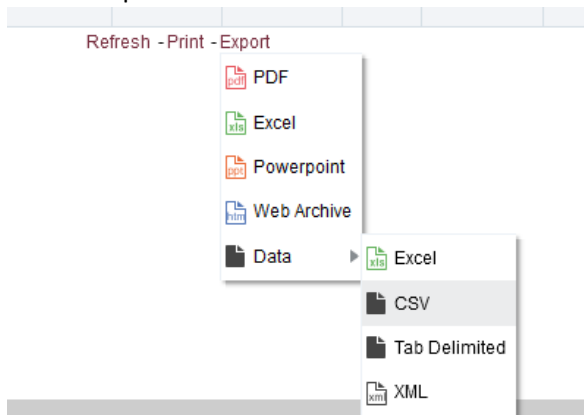
Dashboards > HR Reports > **HR - GL Detail**

- Used to view personnel contained in "salary categories." Helpful if you have multiple paid personnel or if you want to double check that yourself / your GA / undergrad, etc was paid / how much during a specified length of time.
- When selecting Journal Id:
  - PAY0XXXXXX - Q_021722 - 22-FEB-22 = A single letter indicates a regular payroll cycle.
  - PAY0XXXXXX - RDF0XXXXXX - DD-MMM-YY = Correction
  - PAY0XXXXXX - REF0XXXXXX - DD-MMM-YY = Correction
  - PAY0XXXXXX - OFF0XXXXXX - DD-MMM-YY = Off-cycle paycheck (employee did not make payroll)
  - You can select as many periods as you would like.
- *Always* enter either:
  - *A Department ID and your project ID before searching.*
    - Reference searching instructions above.
    - *-and/or-*
  - *Your Name, Your GAs Name, etc.* (Use the **"Contains"** field to search by **last name**).

  - *Failing to do so will result in long query times and an overabundance of data.*
- Can be exported to CSV and sorted. **Scroll to the bottom** of the query to find the Export Button.
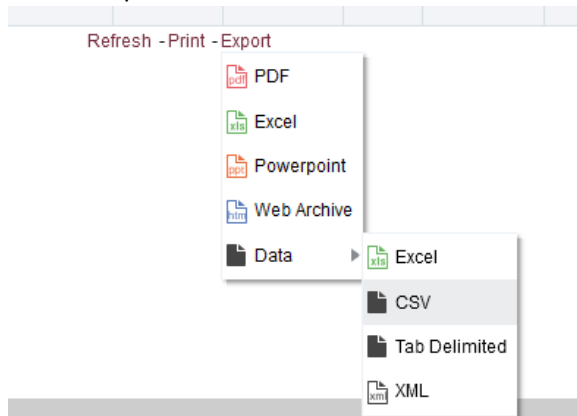
The data contained in BI should be viewed for your research purposes only. Please search for and use all data responsibly.

Contact your Post-Award Department staff or Laura Kitchens, lkitchens@fsu.edu for additional questions concerning using BI.