

How to access and your research activity balances, via your Reporting Dashboard (LBI)

- 1) Open SMH Intranet Home page and click **My Business** tab.

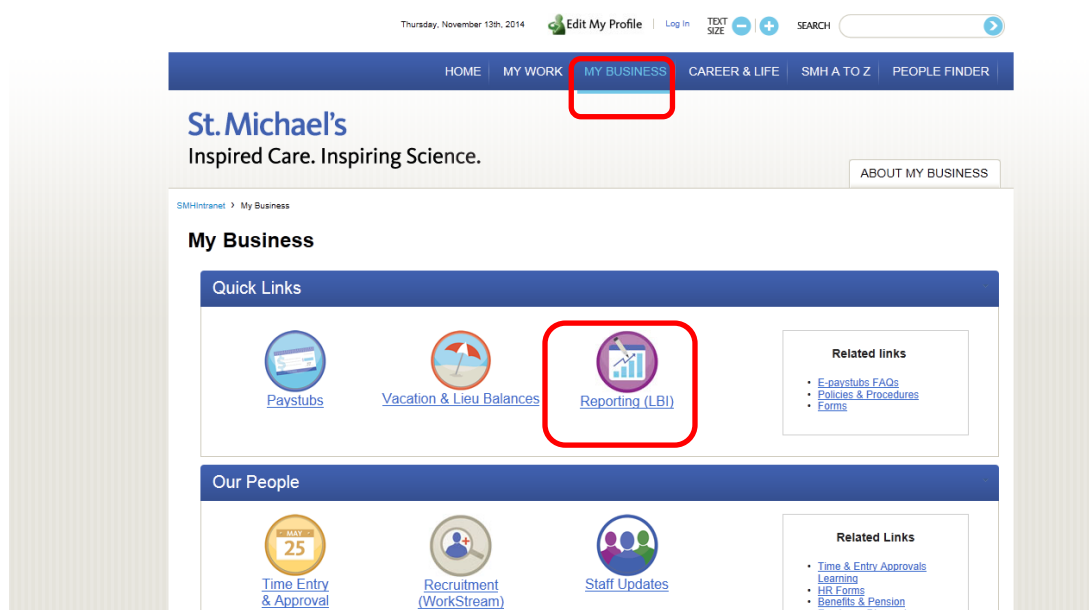
Note: Be sure to use Internet Explorer only as other browsers (e.g.: Firefox) may not support the Reporting Dashboard.

This will direct you to the My Business portal, which includes Quick Links to Reporting (LBI).

- 2) Click the **Reporting (LBI)** icon

A security window may appear. If so, enter your login credentials (your SMH network ID & password).

If you are accessing from home/remotely, be sure to add "smh\" before your user name. e.g.: "smh\LastnameA"



- 3) You will then be directed to your Dashboards. The Activity Financial Reports are available on the **My Manager Space** dashboard – within the **My Financials** section – under the **Activity Reports** grouping. Click **Activity Financial Reports**

Lawson Dashboards

My Manager Space | EFM-FST | EFM Report Validation | Inter-Department | GoLive-AccountsPayable | GoLive-Corporate Finance | Avaap Security Dashboard | GoLive-Activities

My Manager Space

My Manager Space

My Employees

- My Staff List
 - Performance Appraisal Reminder
 - Seniority Report
 - Staff Listing
 - Staff Sick Time
 - Staff Vacation and Bank Time

My Financials

- Hospital Reports
 - Financial Reports
 - Statistical Reports
 - Payroll Reports
 - R1-2011B GL Transaction Report
- Activity Reports
 - Activity Financial Reports**
 - Activity Payroll Reports
 - Physician Invoices
 - My Activities
 - Activity Transaction Query

Announcements

February 17 2015

Part Time Vacation Balance

As was communicated in May, part time employees will now be awarded a vacation balance and all vacation time will be tracked. Part time Vacation Balance information can now be found on the Vacation and Bank Time Report.

If you have any questions about this, please refer to the Vacation Policy located on the SMH Intranet.

Payroll Monthly Financials

We are pleased to announce that fiscal year-to-date financials will be available here in March, 2015.

February 18 2015

“Activity Financial Reports” is a parameter driven query which will allow you to view your up to date balances. Click here to view the balances of each activity.

R3-45 | LBI Information Center

- 4) You will then be directed to another screen where you will need to enter your query parameters. Once you have entered your parameters, click OK to run the report.

Reports - Internet Explorer provided by St. Michael's Hospital

AS-Dollars - Activity Summary Reports Historical Instances List

Welcome, ramprashada

1 - 2 of 2

Report Name
ActivitySummary_DollarsByStructure Daily [History]
ActivitySummary_DollarsByStructure [History]

Select "ActivitySummary_DollarByStructure Daily" to view the activity balances

5) Once you click the ActivitySummary_DollarByStructure Daily, you'll get the following page:

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Activity Summary

Report Description: Activity Summary Report Dollars by Structure

Report Parameters

Fiscal Year: FY 2018 - 2019 Per 9

Current Month: Dec 2018

Notations:

LTD - Life to Date

* - Contains Non CS Commitments

0408 - ORA - Infrastructure

Activity Description	Activity #	Current Actuals	Budget	Commitments	LTD Actuals (s surplus)/deficit	Budget Available
Research Projects	R0408	0.00	Total Revenues	Commitments	Revenues	LTD Revenue
Revenue		0.00	Total Expenses	Commitments	Expenses	LTD Expenses
Expenses		0.00	Total Budget	Commitments	Total	LTD Totals
Total		<u>0.00</u>				<u>Budget Total Available</u>

[Annual View](#)

Click on research projects - this will take you to the next page with detailed breakdown of different activities you have.

Activity Summary

Report Description: Activity Summary Report Dollars by Structure

Report Parameters

Fiscal Year: FY 2018 - 2019 Per 9

Current Month: Dec 2018

Drill Path (Level 2): 0408 - ORA - Infrastructure

This breakdown will allow you to see all the active projects. As you can see, The projects can be divided into one of the three categories:

1. Contract Research
2. Other Research
3. Peer Reviewed Research

Depending of what your project is categorized as from the initial start up will determine which link it will be in.

For this example, Contract Research

0408 - ORA - Infrastructure

Activity Description	Activity #	Current Actuals
Research Projects		
Contract Research	R0408	
Revenue		0.00
Expenses		0.00
Total		<u>0.00</u>
Annual View		
Other Research		
Other Research	R0408	
Revenue		0.00
Expenses		0.00
Total		<u>0.00</u>
Annual View		
Peer Reviewed Research		
Peer Reviewed Research	R0408	
Revenue		0.00
Expenses		0.00
Total		<u>0.00</u>
Annual View		
Totals for Research Projects		<u>0.00</u>

- 6) You can save and print this report. You are also able to export this report in Excel, export to a PDF file, or export this to a Comma Separated Value (.csv) format.

Activity Summary

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Report Description: Activity Summary Report Dollars by Structure					Notations: LTD - Life to Date * - Contains Non CS Commitments	
Report Parameters						
Fiscal Year: FY 2018 - 2019 Per 9						
Current Month: Dec 2018						
Drill Path (Level 3) 0408 - ORA - Infrastructure -> Research Projects						
0408 - ORA - Infrastructure						
Activity Description	Activity #	Current Actuals	Budget	Commitments	LTD Actuals (surplus)deficit	Budget Available
Contract Research						
<u>Project ABCDEF</u>						
Revenue	20200-24001	0.00	0.00	0.00	0.00	
Expenses		0.00	1.00	0.00	0.00	1.00
Total		0.00	1.00	0.00	0.00	1.00
Annual View						
<u>Project ABC</u>						
Revenue	R0408-20199	0.00	0.00	0.00	0.00	
Expenses		0.00	5.00	0.00	0.00	5.00
Total		0.00	5.00	0.00	0.00	5.00
Annual View						
Totals for Contract Research		0.00	6.00	0.00	0.00	

These values will provide you with the total balance in your activity.

If you would like more information on the balances, click the amount listed and it will redirect you to another page with more information.