BI Finance General How-to Dashboard Training

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Albany, NY
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How to Sign-in to BI
Sign-on to BI

Click on ‘SUNY Portal’
Click on ‘Reports’ near top right
Click ‘Dashboard’ button
Sign-on to BI, con’t

Or set up a bookmark:

suny.edu/analytics
Overview: BI – Finance Dashboards
Available BI - Finance Dashboards
### BI Home Page:

- Home
- Dashboards
- My Account
- Recent
- Most Popular

**Recent Dashboards:**
- Account Summary - Account S...
- Account Summary - Pending E...

**More Dashboards:**
- Account Summary - Introduction
- Account Summary - Actual Alloc/E...

**Others:**
- PO Summary Daily count 2-14...
- End Cash Balance by Campus

**Most Popular:**
No recommendations are currently available. Most Popular items will be displayed here when results become available.

Download BI Desktop Tools ↓
When logging into BI the defaults start page is your home page, to change your default start page to a frequently used dashboard:

1. Top right corner, click your user ID>My Account

2. In the My Account dialog box> preferences tab> Starting page drop down you can select your preferred start page

3. Click ‘ok’

4. When you launch BI, this page will open first
Overview: Account Summary/ General Dashboard How-to
• Click on the Tab or Link to dashboard page you would like to use.

• Defaults are set to account “000000” so the query doesn’t run when it is first opened and fiscal year
  • Be sure to delete or change the default account “000000” to run query
• Selection fields are case sensitive
• Must always click “Apply” to run query
Account Number, Fiscal Year and Campus fields are “linked” selections, once you input into one of these fields the other fields will filter for the applicable attributes that relate to the original field input.

For example, when there is no account indicated all fiscal years are available to select, but when you add an account that is only related to FY 13-14, only that FY is available to select.

To Select “all” items in a selection, leave the field blank. For example if you want every account within the Revenue Offset fund, leave the account field blank (i.e., “--Select Value--“)
Input appropriate selection criteria based on the query you want to run.

This example: Account 900837, Fiscal Year 19-20

Click “Apply”, results will display below.

<table>
<thead>
<tr>
<th>Year</th>
<th>Beginning Cash Balance</th>
<th>Prior Yr Deductions</th>
<th>Prior Yr Encumbrances</th>
<th>Adjusted Beg Cash</th>
<th>Revenue</th>
<th>Fringe &amp; O/H Assessments</th>
<th>Expenditures</th>
<th>Ending Cash Balance</th>
<th>Encumbrances</th>
<th>Fringe &amp; O/H Encumbrances</th>
<th>Cash Bal less Encumbrances</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>335,239.82</td>
<td>3,252.24</td>
<td>0.00</td>
<td>935,776.00</td>
<td>472,911.79</td>
<td>82,432.08</td>
<td>180,701.91</td>
<td>765,953.92</td>
<td>51,935.84</td>
<td>0.00</td>
<td>713,017.08</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Assessments</th>
<th>Rate</th>
<th>Expenditure Encumbrance Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>19-20</td>
<td>Administrative O/H</td>
<td>6.0%</td>
<td>29,932.19</td>
</tr>
<tr>
<td></td>
<td>Fringe Benefits</td>
<td>30.74%</td>
<td>53,113.63</td>
</tr>
<tr>
<td></td>
<td>Maintenance O/H</td>
<td>0.00%</td>
<td>0.00</td>
</tr>
<tr>
<td>19-20 Total</td>
<td></td>
<td></td>
<td>83,045.82</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td></td>
<td>82,432.08</td>
</tr>
</tbody>
</table>

Account begins with 900837-99
and Fiscal Year is equal to 19-20
and ("Cost Center Time","Cost Center Year 4" >= 2008)
Basic Dashboard Information:
• Maximum rows of data = 500,000

• Blue values = drillable for more detailed info
The user can include columns or exclude columns to customize their view.

To **include** a column:
- Right click on a column heading
- Hover over the ‘include column’
- Click on the column you wish to include
- The column will be added to the right of the column where you clicked

To **exclude** a column:
- Right click on the column heading
- Click on ‘Exclude Column’
To move column click, hold, and drag to rearrange columns, section by attribute, or to create prompt

The blue highlight shows where the column is being moved to

<table>
<thead>
<tr>
<th>Charge Agency Name</th>
<th>Fiscal Year</th>
<th>Major Object</th>
<th>Originating Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cortland Total</td>
<td>16-17</td>
<td>OTPS</td>
<td>Cortland</td>
</tr>
<tr>
<td>Downstate Medical Total</td>
<td>16-17</td>
<td>OTPS</td>
<td>Downstate Medical</td>
</tr>
</tbody>
</table>

Column moved to Pivot Table Prompt Area: creates a drop down box of the accounts

Column moved to Sections Area: creates separate displays by account
How to Save Customizations

When you have a customization format you use frequently, you can save it to apply in the future:

1. Top right corner, click on the three lines below your user id.
2. Click on “Save Current Customization”
3. Name the Customization, click ok
   You can also save as default customization for dashboard here
4. Or apply as needed next time you are on the dashboard page, click the three lines, click ‘Apply Saved Customization’, select from saved customizations you want to apply.
BI Questions and Support
If you have questions on how to use BI or notice a reporting error, please call/email Stephanie or Kari directly

Stephanie Raven
Tel: 518-320-1231
Email: Stephanie.raven@suny.edu

Kari Coleman
Tel: 518-445-4128
Email: Kari.coleman@suny.edu
Join our List Serve!
Get BI update notifications and Tips and Tricks

How to Join:

1. Email: 
   **LISTSERV@LS.SYSADM.SUNY.EDU**
2. Do NOT write anything in subject line
3. Write “Subscribe SUNY-Finance-BI *your name here*” in email body
4. Wait be to approved