BI Finance General How-to Dashboard Training

April 2020

SUNY System Administration
Albany, NY
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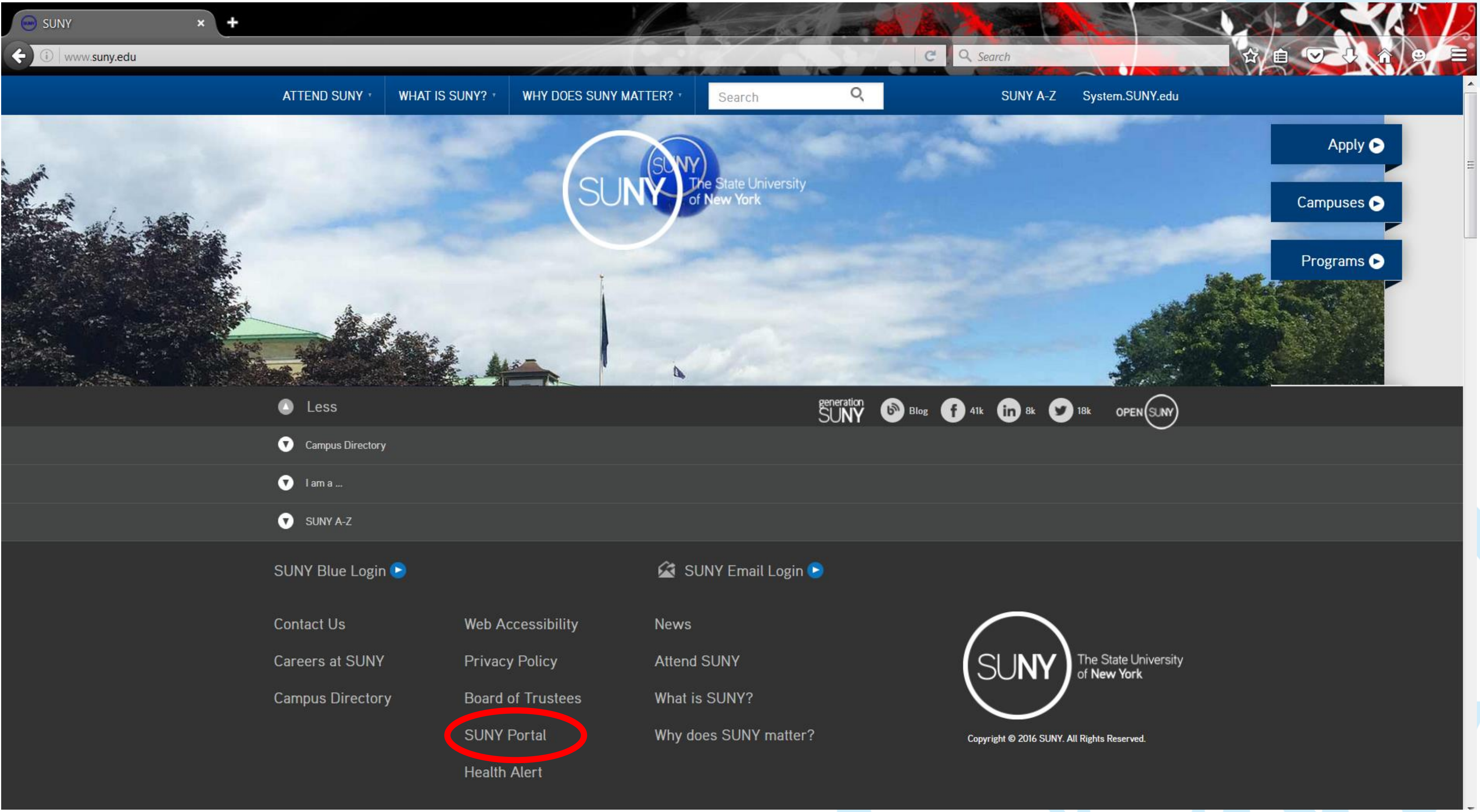
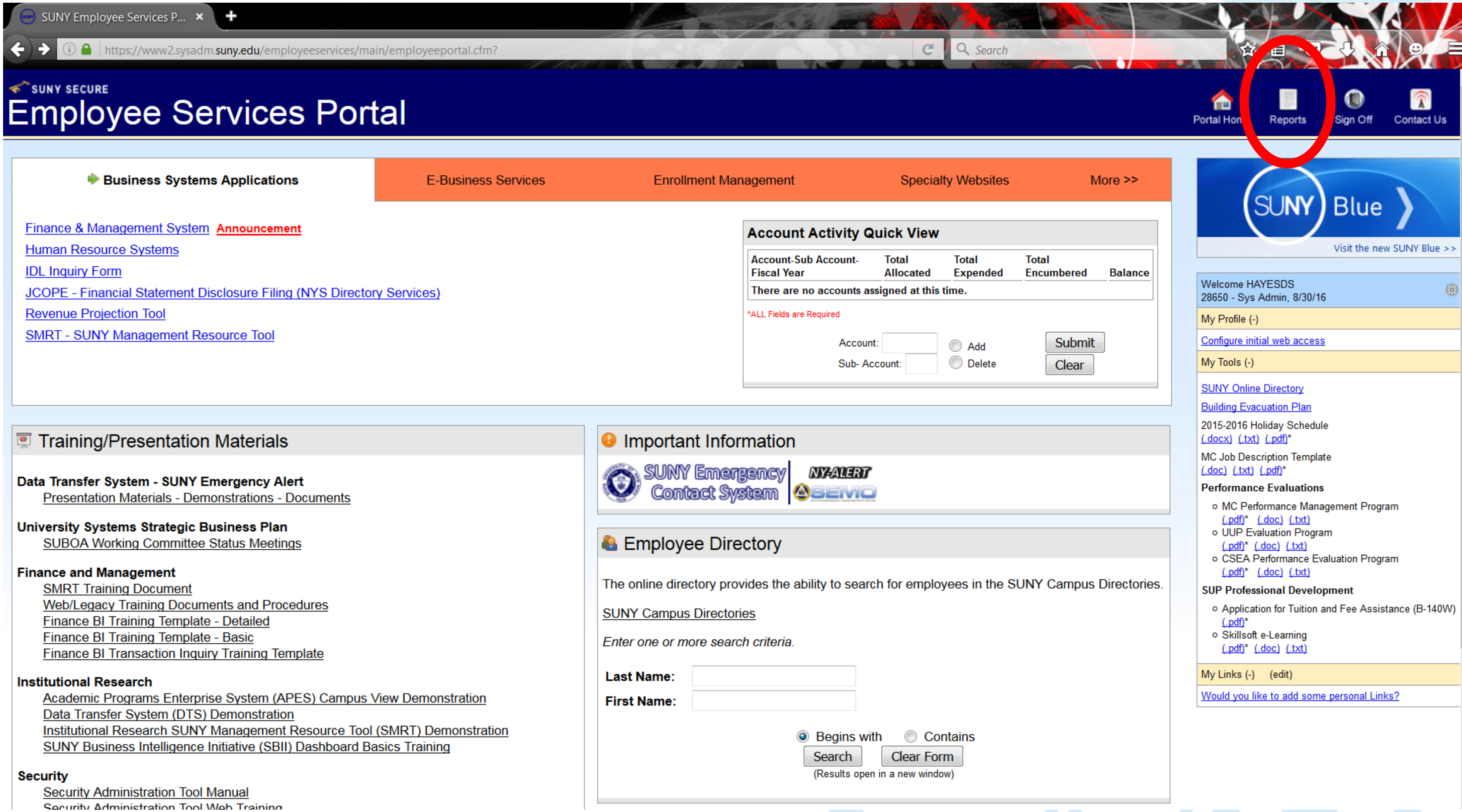
How to Sign-in to BI

Sign-on to BI



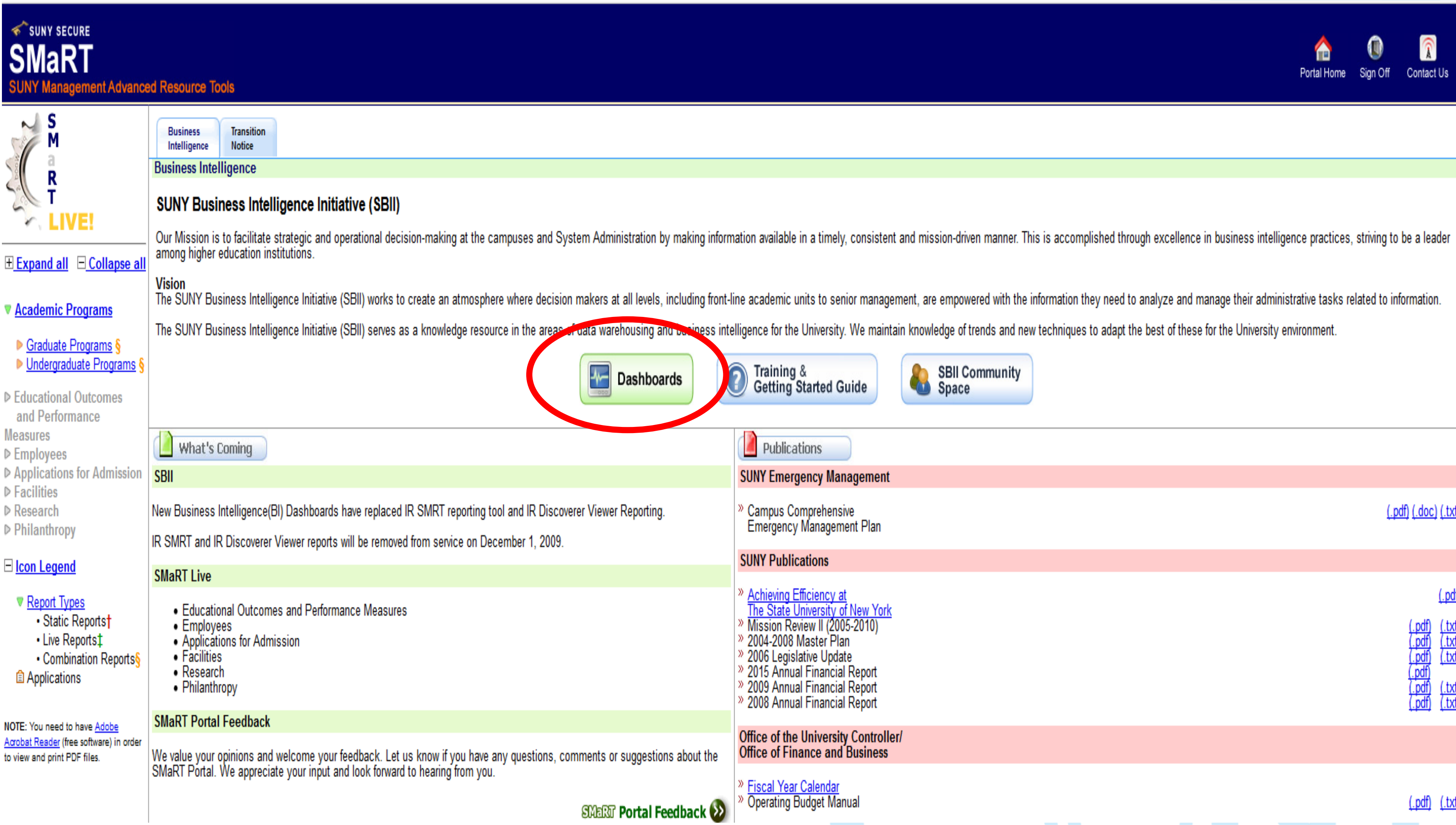
Click on 'SUNY Portal'

Sign-on to BI, con’t



Click on ‘Reports’ near top right

Sign-on to BI, con't



Click 'Dashboard' button

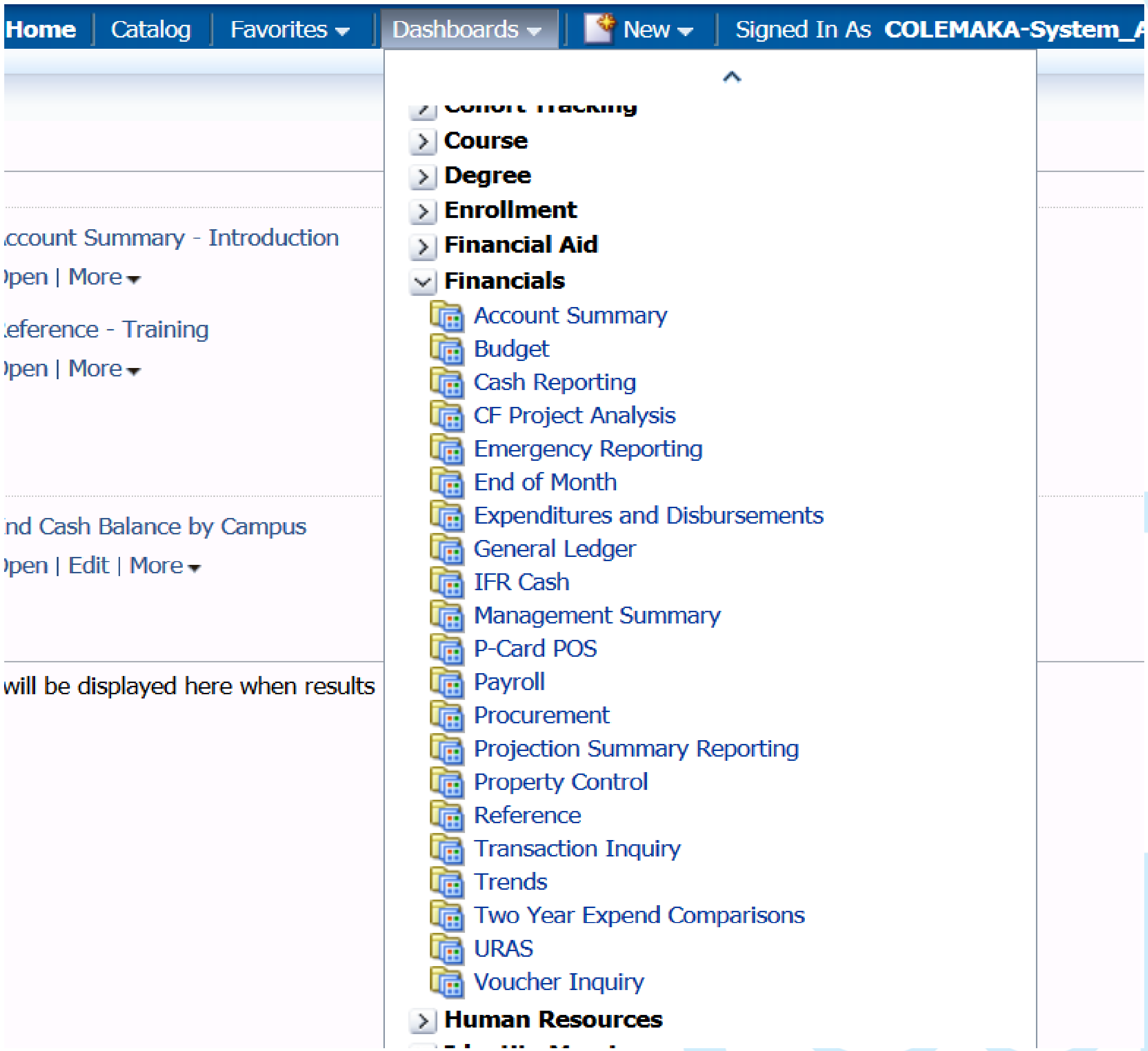
Sign-on to BI, con't

Or set up a bookmark:

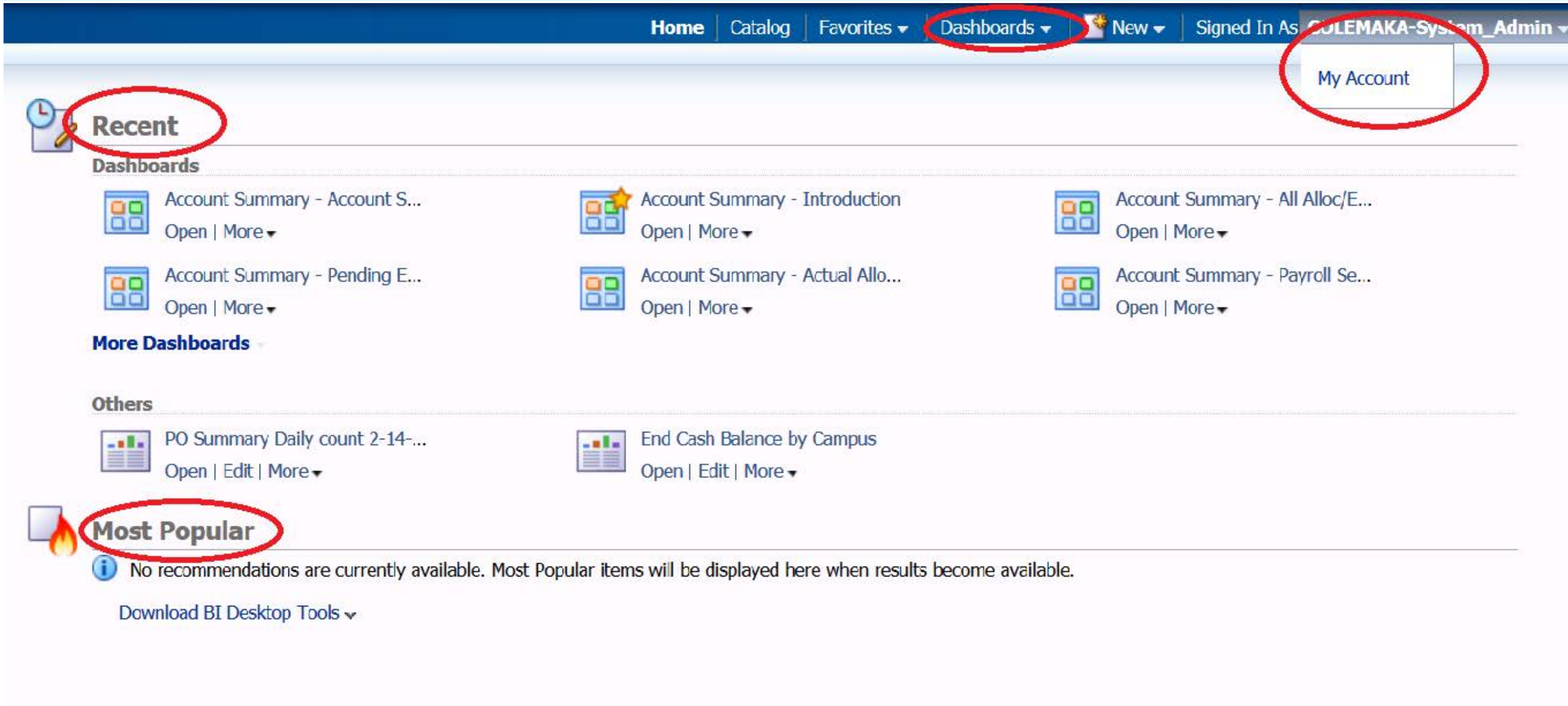
suny.edu/analytics

Overview:
BI – Finance Dashboards

Available BI - Finance Dashboards



BI-Finance Dashboards Access on Home Page



BI Home Page:

Home, Dashboards, My Account, Recent, and Most Popular

BI-Finance Dashboards Access on Home Page

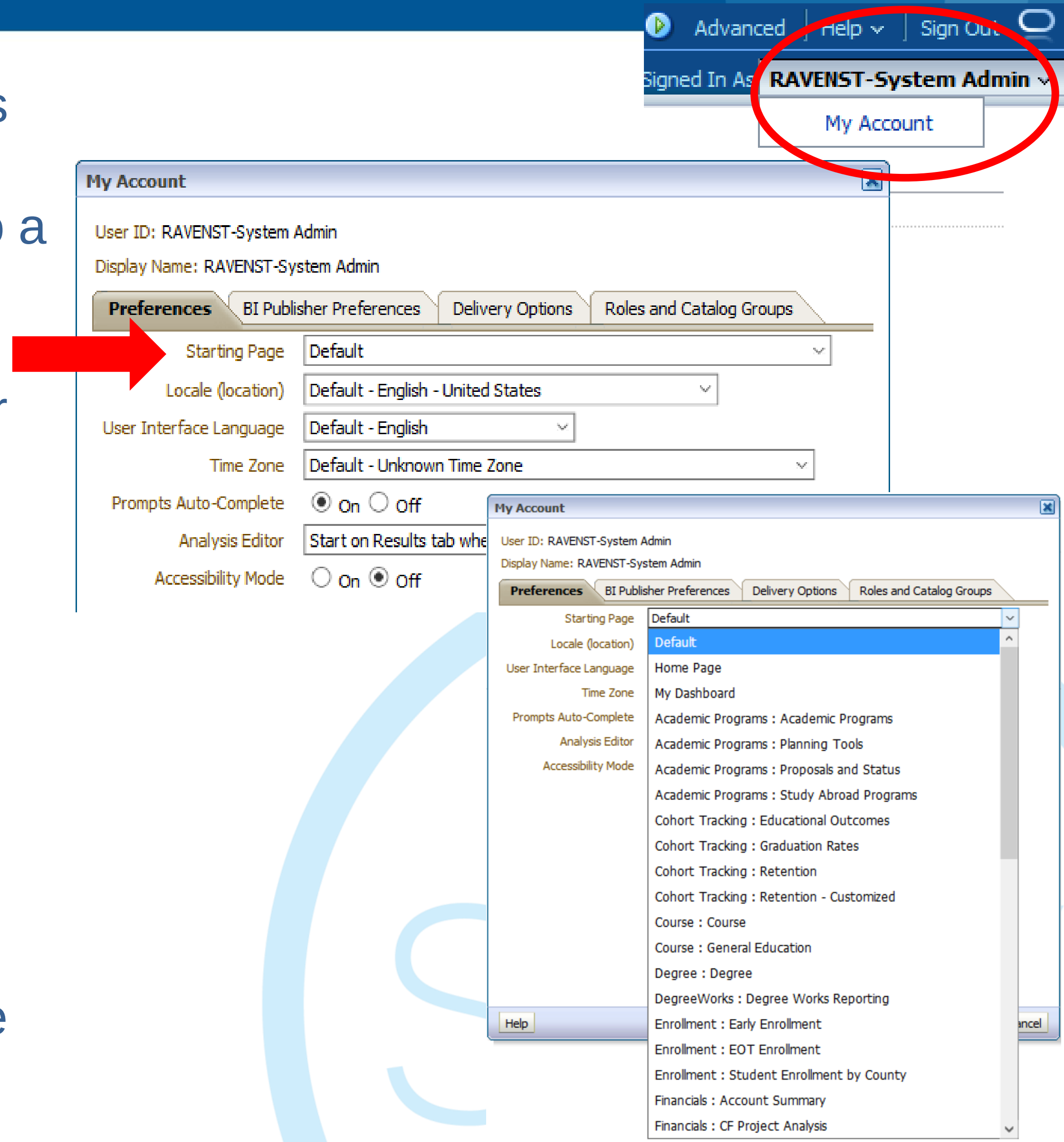
When logging into BI the defaults start page is your home page, to change your default start page to a frequently used dashboard:

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

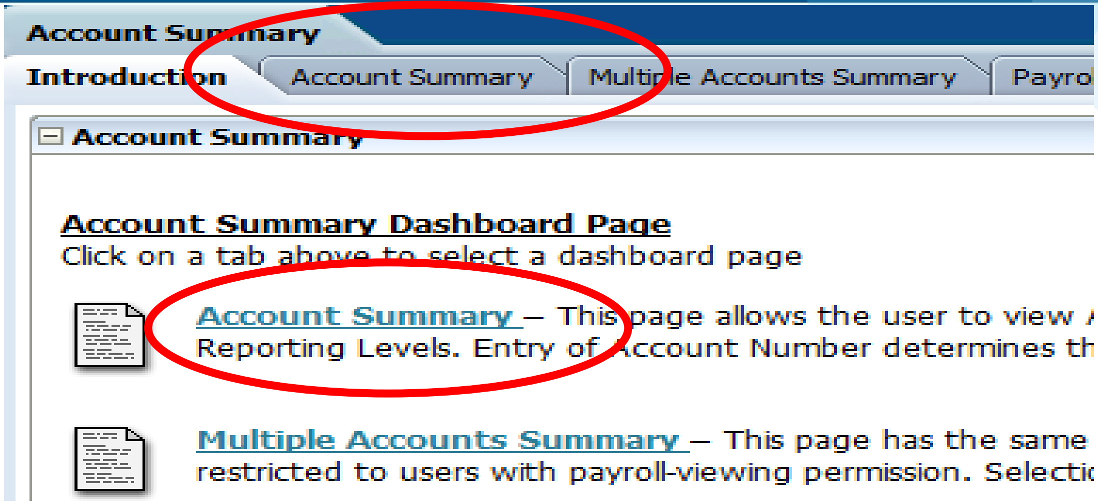


The State University of New York

Overview: Account Summary/ General Dashboard How-to

Account Summary/ General Dashboard How-to

- Click on the Tab or Link to dashboard page you would like to use.

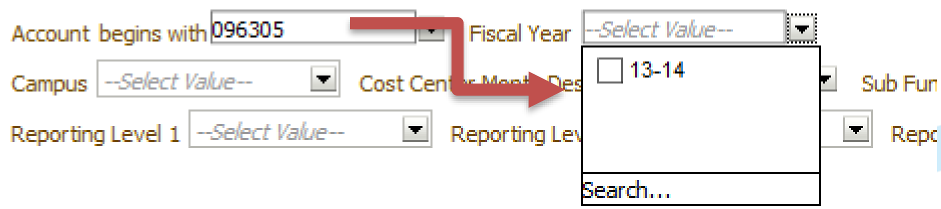


- Defaults are set to account "000000" so the query doesn't run when it is first opened and fiscal year
  - Be sure to delete or change the default account "000000" to run query
- Selection fields are case sensitive
- Must always click "Apply" to run query

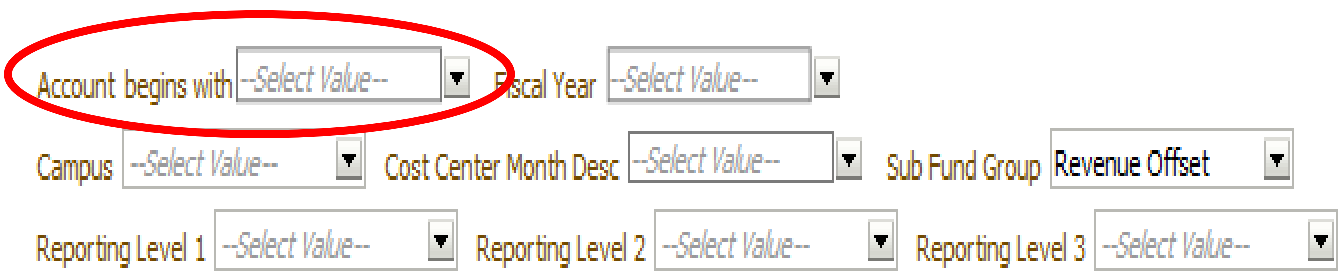
Account Summary/ General Dashboard How-to

- 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—“)



Account Summary/ General Dashboard How-to

- 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.

Account	Account Local Desc	Cost Center	Account Manager
900837-99	COMPUTER CENTER STRATEGIC PLAN	28-777908-0R-19	
	ECATALOG	28-328288-0R-19	
	GENERAL CAMPUS EQUIP OP ACCT	28-324242-0R-19	VP Administration & Finance
	PARKING GARAGE	28-665656-0R-19	

Analyze - Refresh - Print - Export

l Year	Beginning Cash Balance (+)	Prior Yr Disbursements (-)	Prior Yr Encumbrances (-)	Adjusted Beg Cash	Revenue (+)	Fringe & O/H Assessments (-)	Expenditures (-)	Ending Cash Balance (=)		Encumbrances (-)	Fringe & O/H Encumbrances (-)	Cash Bal less Encumbr (=)
0	559,209.32	3,233.24	0.00	555,976.08	472,811.73	82,432.08	180,791.91	765,563.82		51,955.84	0.00	713,607.98

Analyze - Refresh - Print - Export

Fiscal Year	Assessments	Rate	Expenditure	Encumbrance	Total
19-20	Administrative O/H	6.00%	29,919.45	0.00	29,919.45
	Fringe Benefits	38.74%	52,512.63	0.00	52,512.63
	Maintenance O/H	0.00%	0.00	0.00	0.00
19-20 Total			**82,432.08**	**0.00**	**82,432.08**
Grand Total			**82,432.08**	**0.00**	**82,432.08**

Analyze - Refresh - Print - Export

Select View: Summary by Major Object

Charge Agency Name	Fiscal Year	Major Object	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used	
Grand Total			**207,202.00**	**180,547.46**	**244.45**	**7,995.00**	**43,960.84**	**-25,545.75**	**112.33**	
System Admin Total			**207,202.00**	**180,424.32**	**244.45**	**7,995.00**	**43,960.84**	**-25,422.61**	**112.27**	
System Admin	19-20	PSR	202,202.00	140,140.14	0.00	0.00	43,960.84	18,101.02	91.05	
		TS	5,000.00	0.00	0.00	0.00	0.00	5,000.00	0.00	
		OTPS	0.00	40,284.18	244.45	7,995.00	0.00	-48,523.63		
U-Wide Programs Total			**0.00**	**123.14**	**0.00**	**0.00**	**0.00**	**-123.14**		
U-Wide Programs	19-20	OTPS	0.00	123.14	0.00	0.00	0.00	-123.14		

Account begins with **900837-99**
and Fiscal Year is equal to **19-20**
and ("Cost Center Time"."Cost Center Year 4" >= 2008) or ("Fund Identifier"."Sub Fund Group" IN ('Res Hall Rehab and Repair Project', 'Capital Projects Bonded', 'Comm. Projects Fund')) or ("Charge Agency"."Campus" = 'Construction Fund')

Analyze - Refresh - Print - Export

Analyze - Refresh - Print - Export

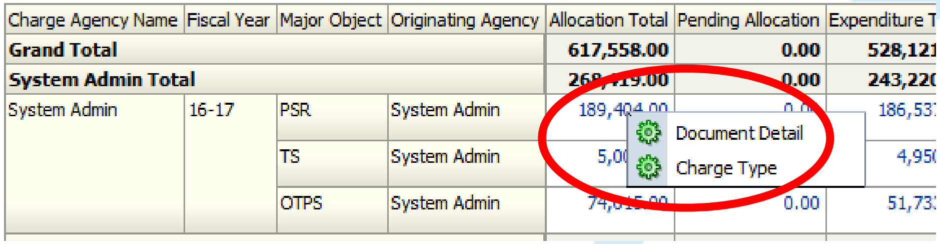
Account begins with **900837-99**
and Fiscal Year is equal to **19-20**
and ("Cost Center Time"."Cost Center Year 4" >= 2008) c

Account Summary/ General Dashboard How-to

Basic Dashboard Infromation:

- Maximum rows of data = 500,000

- Blue values = drillable for more detailed info



Charge Agency Name	Fiscal Year	Major Object	Originating Agency	Allocation Total	Pending Allocation	Expenditure T
Grand Total				**617,558.00**	**0.00**	**528,121**
System Admin Total				**26[illegible]19.00**	**0.00**	**243,220**
System Admin	16-17	PSR	System Admin	189,404.00	0.0[illegible]	186,53
		TS	System Admin	5,00[illegible]	[illegible]	4,950
		OTPS	System Admin	74,0[illegible].00	0.00	51,73

Account Summary/ General Dashboard How-to

The user can include columns or exclude columns to customize their view.

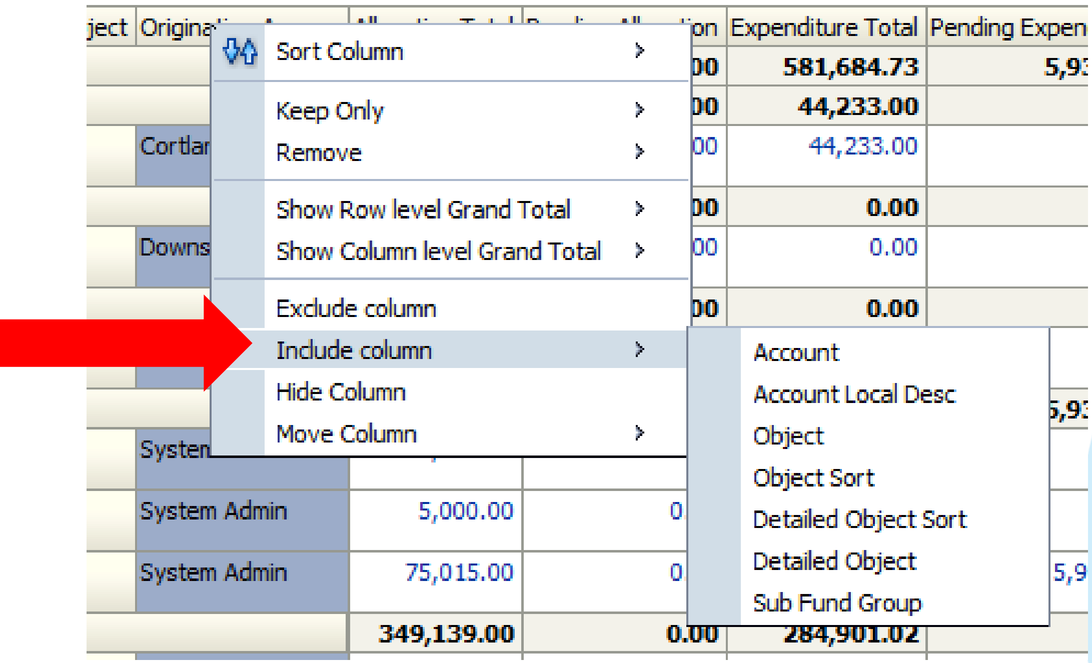
To include a column:

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

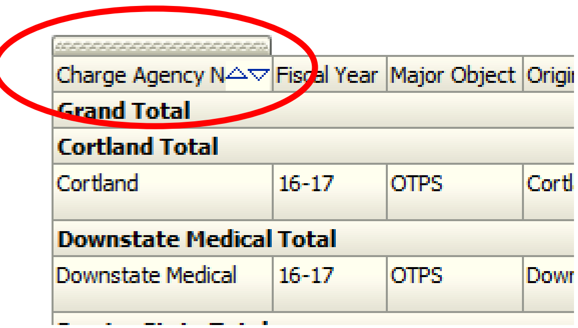
Right click on the column heading

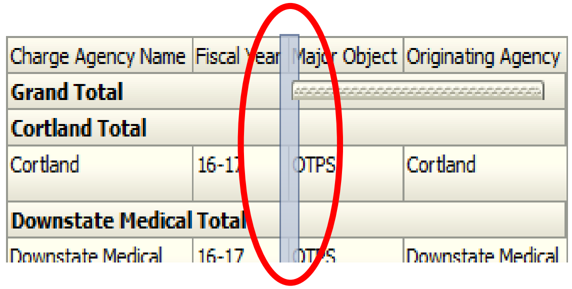
Click on 'Exclude Column'

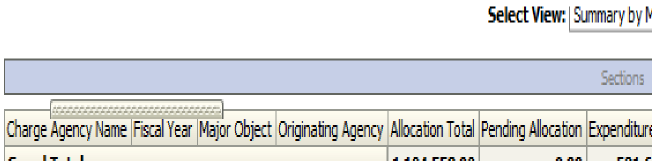
Account Summary/ General Dashboard How-to

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

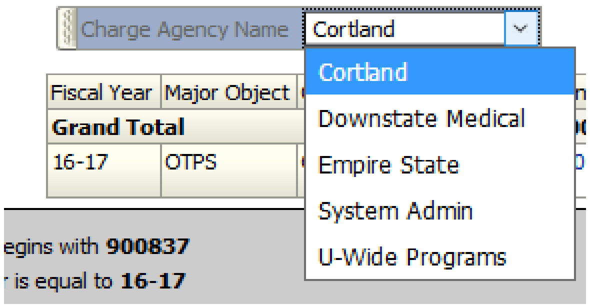


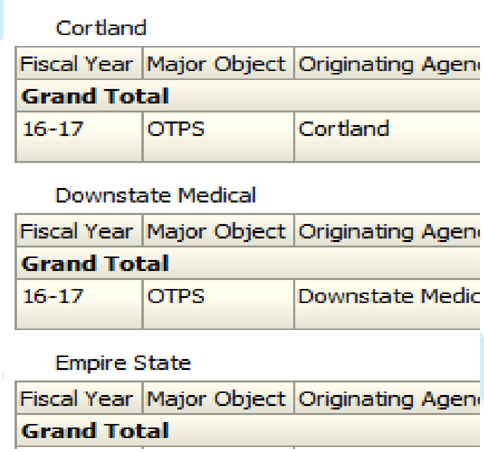




Column moved to Pivot Table Prompt Area: creates a drop down box of the accounts

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:

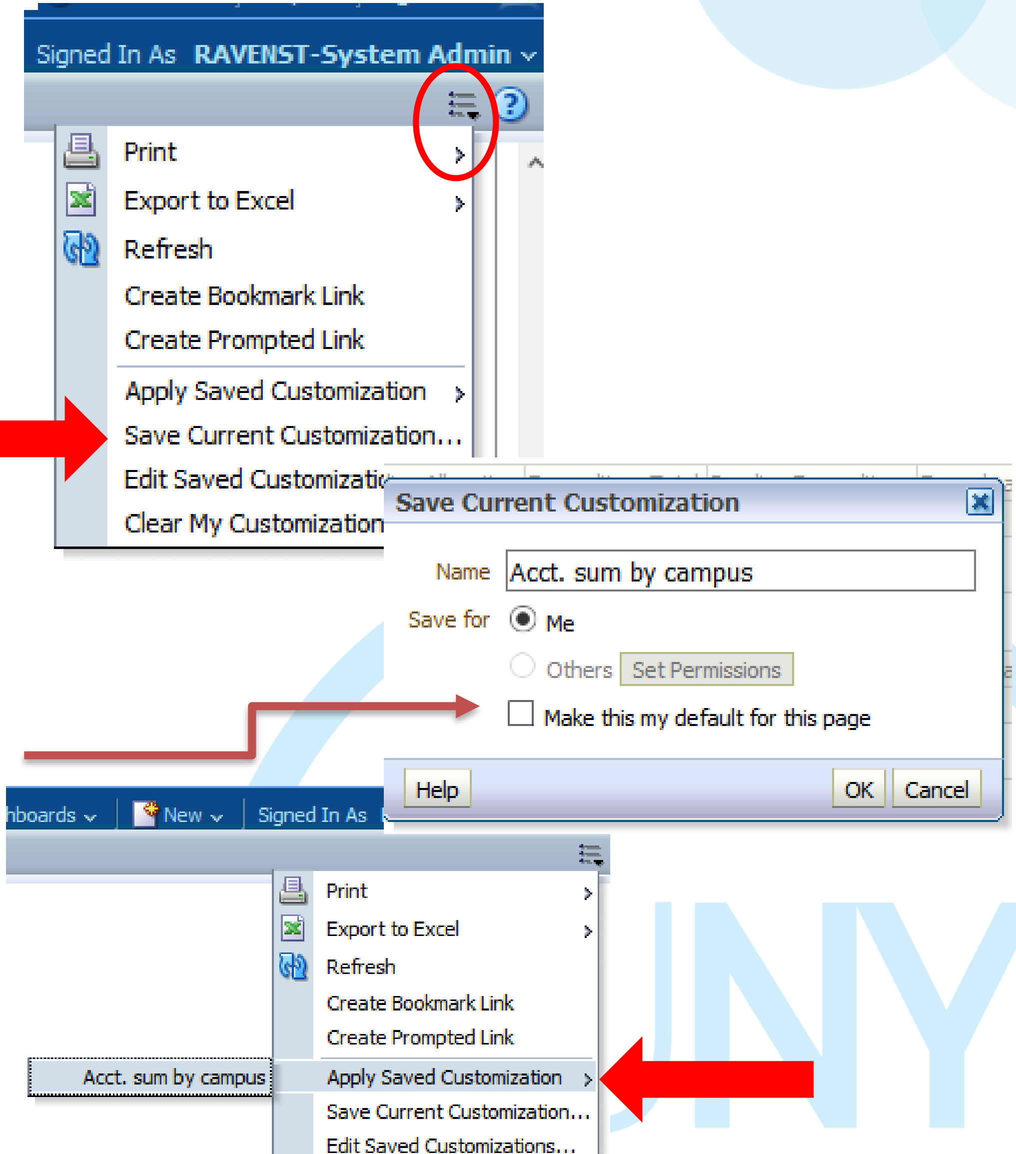
1. Top right corner, click on the three lines below your user id.

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

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4. Wait be to approved

Thank you