Self-Service Training: Financial Business Intelligence (BI)

Below is information, including training videos, on accessing financial account information in BI.

All underlined items contain a link to a training video.

Additional information can be found at http://bifinancial.buffalostate.edu/training

Log in to SUNY's Business Intelligence (BI) Financial Dashboards at www.suny.edu

The **Account Summary Dashboard** has multiple pages available to users. They include:

- Account Summary
  Items covered in the Account Summary page include:
  Overview:
    - Selection Parameters
    - Views
  Financial Data:
    - Allocation
    - Expenditures
    - Encumbrances
  IFR Cash:
    - Overview
    - Revenue
    - Fringe Benefits & Overheads
- Multiple Accounts Summary
- Payroll Search
- Open PO's
- Actual Alloc/Exp/Enc (Advanced options – video forthcoming)
- Pending Alloc/Exp/End (Advanced options – video forthcoming)
- All Alloc/Exp/Enc (Advanced options – video forthcoming)

Users will also have access to the **Reference Dashboard**. Items covered in the Reference Dashboard include:

- Tips & Tricks
- Support Tables
- Funds
- Reporting Structure
- Training Modules & Documents

Other training information regarding the general use of BI:

- Arrows, Return & Breadcrumbs
- Print & Export
- Favorites & Customizations