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Business Intelligence

The Business Intelligence dashboards provide you with summary Income and Expenditure data for the Department(s) / Budget Centre(s) to which you have access. The tabs in the dashboard are designed to provide this information at various organisational levels:

- Department
- Budget Centre
- Project

Navigation

On any page, data can be updated for any year or month. Also, the organisation level (Department, Budget Centre or Project) can be changed as appropriate. However, if you select an area that you don’t have access to, the page will not return the amounts.

Note that the refresh button needs to be clicked to retrieve the new information.

Where data appears as a blue hyperlink, this indicates that more information is available by clicking on the hyperlink – this is referred to as “drill down” in this document.

Note: Drill down is also available from any dials displayed on a page.

By clicking on a drill down, in most cases you will be taken to an “Enquiry” page (example below). An exception to this is the drill down from the first page of the Budget
Centre summary. The drill down from this page goes to a page showing an Income and Expenditure summary for the Budget Centre selected from the initial page.

An enquiry page allows you to continue drilling down by clicking on the blue hyperlinks on that page or by using the Explore panel.

All enquiries have a predefined drilldown path. However, there are some tricks to enhance the usability of the system.

By clicking on the '+' sign in the Explore panel you can open up the drilldown path.

Where alternative drill down paths have been defined, a different view of the data can be accessed by clicking on the “Design” tab and then “Change Drilldown Path” as shown below. An alternative drill down path can then be selected from the pop-up box.
When you are on a grid display, you can opt to download the data to Excel, print the data, or send to Word by using the icons down the side of the grid.

On the button bar, the key navigation buttons are:

- Back and Close will return you to the original page;
- Windows to navigate between your “open” pages.

The final level of drill down will provide a list of transactions they make up the “YTD Actual” amount shown on the previous page. It is not possible to drill further into these transactions. To obtain further information a standard FinanceOne enquiry should be used.