DW for Sponsord Programs
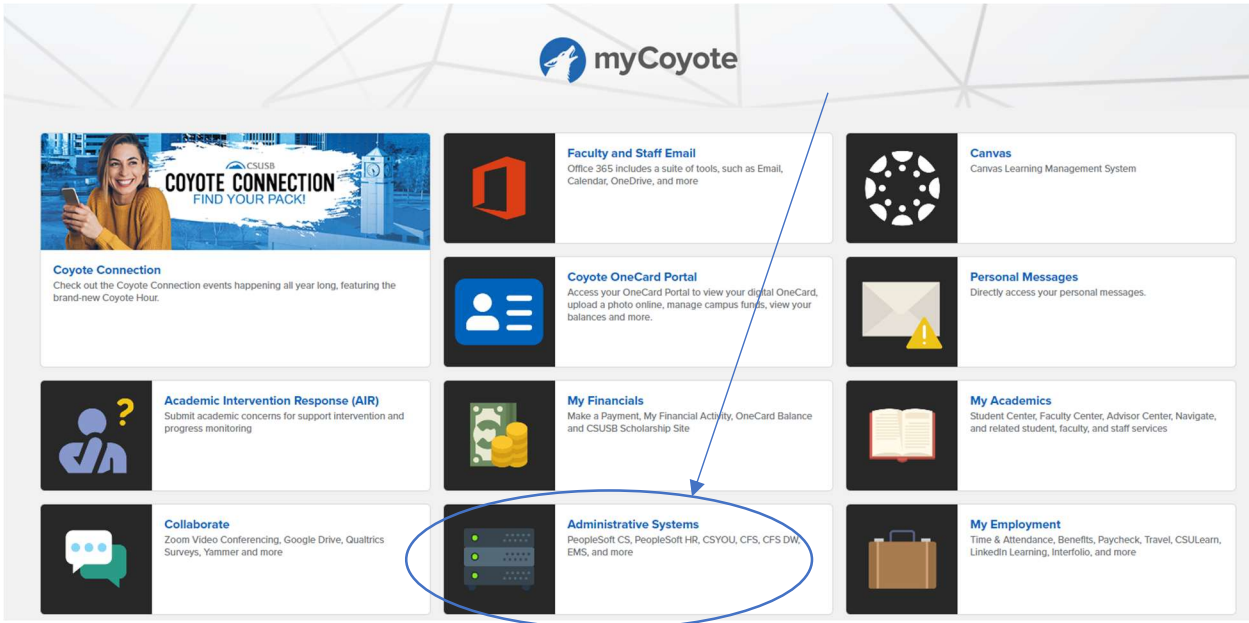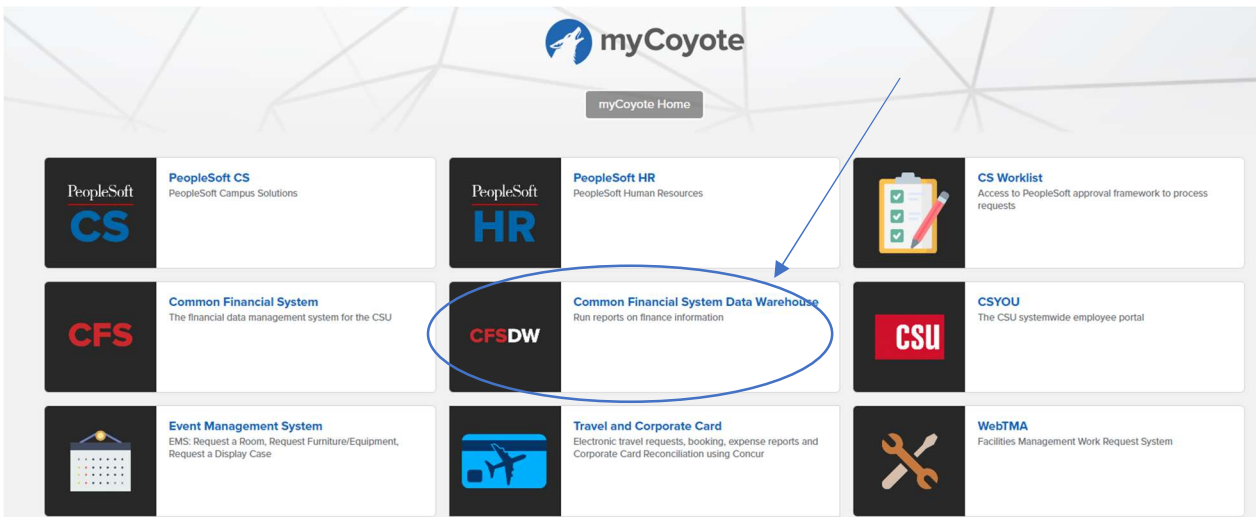
Start in myCoyote home→ Administrative Systems

After clicking on Administrative systems, the below icons should appear (please note you may not have all of the icons shown on screen shot)→ Common Financial System Data Warehouse (CFSDW)

The CSU Business Intelligence/ Data Warehouse web page will open up. From here you will click on the Sponsored Programs icon.

Once in the home page you will need to select **SBFDN- University Enterprises Corp.** for the primary business unit, and Standard Budget Group for the primary budget ledger. → Now click on the page options wheel on the top right corner → Save Current Customization as Grants default.

Now click on Manage My grant → you will now enter the different filters that apply to pull your grant information.

The main filters that you will need to fill in are Business Unit, Fiscal Year, Period, Account Type (usually you should only need 60-Expenditures), Fund, Dept., and project. If you want to see all the grants under you can choose to filter for your name under PI Name and use all of the previously listed filters except Fund, Dept, and Project. This will allow you to all your grants under one report.

Refresh - Print - Export

You can print or export the data results, by clicking on the icons the bottom center of the page.

Helpful Terminology

Fiscal Year/Year—The period of time from July 1 through June 30. Referred to by the year of July 1

- ➢ Ex: July 1, 2015—June 30, 2016 is Fiscal year 2015

Periods—Each fiscal year is broken into Periods (calendar months), beginning in July.

- ➢ July = Period 1, August = Period 2, …December = Period 6, …June = Period 12.
- ➢ Fiscal year and Period are required on all DW reports, as well as Fund and other chartfields as needed.
- ➢ Period 0 contains the sum of previous years of activity. Exp or Rev Roll forward.

Drilldown—Process of going from high level summary financial information to detail transactions within a Data Warehouse report.