## **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)  $\rightarrow$  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.  $\rightarrow$  Now click on the page options wheel on the top right corner  $\rightarrow$  Save Current Customization as Grants default.

Sponsored Programs	Home Dashboards <del>-</del>	Open 🗸 🙆
Home Manage My Grant Grant Admin Award Attributes	$\longrightarrow$	<mark>.</mark> 0
	Print	*
Select primary business unit for campus level reporting Select primary budget ledger Select original budget scenario only	Export to Excel	•
SBFDN - Univer V Standard Budg VSelect Value- V Apply Reset V	G Refresh	
	Create Prompted Link	
** All Filters/Frompts are Edescr (Field + Description) **	Apply Saved Customization	*
Manage My Grant	Save Current Customization	<u> </u>
This link takes the user directly to the "Budget-to-Actual" report which provides a grant/contract Budget-to-Actual report (financial information and grant attributes) to facilitate the financial imanagement of externally funded awards. The report filter contains defaults to account t management), reporting as of fiscal period 12 (ending June 30th of each FY) AND Active funds – so that the information returned for additional filters provided (like P) Name, Fund, etc.) is always up-to-date on all current (active) funds. All filters may be changed – defaults are provided (like P) Name, Fund, etc.) is always up-to-date on all current (active) funds. All filters may be changed – defaults are provided (like P) Name. Fund, etc.) is always up-to-date on all current (active) funds. All filters may be changed – defaults are provided (like P) Name. Fund, etc.) is always up-to-date on all current (active) funds. All filters may be changed – defaults are provided (like P) Name. Fund, etc.) is always up-to-date on all current (active) funds. All filters may be changed – defaults are provided (like P) Name. Fund, etc.) is always up-to-date on all current (active) funds. All filters may be changed – defaults are provided (like P) Name. Fund, etc.) is always up-to-date on all current (active) funds. All filters may be changed – defaults are provided (like P) Name. Fund, etc.) is always up-to-date on all current (active) funds. All filters may be changed – defaults are provided (like P) Name. Funds etc.)	d Edit Saved Customizations	
ant/contract budgets and expenditures. The default column headers for this report are designed with the Plend user in mind in the following order: Fund, Project, Project End Date, Department, Account w/full description (Fdescr). Of course column headers may be chan	E Clear My Customization	is is
Grant Admin		
Reports designed for the grant administrator or more seasoned report generator with a general knowledge of PeopleSoft and the SP Mod attributes. Provides another option for the Budget-to-Actual report at the summary level and additional administrative reports to facilitate gra	int administration including, trial bala	ance, billing
Award Attributes		
Reports on specific SP Mod attributes, including the Award-Project Attribute report fail of the SP mod attributes and reports D0 NOT include any financials and reports on other attributes including, awards, cost sharing, subrecipients, reporting, compliance, conflict of interest, etc. These reports D0 NOT include any financials and reports the source attributes including awards, cost sharing, subrecipients, reporting, compliance, conflict of interest, etc. These reports D0 NOT include any financials and reports the source attributes including.	I information from PeopleSoft GL. Th	he Award-

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

Sponsored Programs	Award Attributes
eport Filters	
	Business Unit     Fiscal Year     Period (as of)     Account Type     Account Category     Budget Ledger       SBEDN-University Enterprises Corp. <ul> <li>2023</li> <li>12</li> <li>60 - Expenditu</li> <li>Select Value</li> <li>Standard Budg</li> <li>Select Value</li> <li>Standard Budg</li> <li>Select Value</li> <li>Standard Budg</li> <li>Select Value</li> <li>Select Val</li></ul>
	Fund     Dept     Account     Project     Program     Class     Fund CF Status     CSU Fund      Select Value -
	PI Name       Post Awd Admin       Project CF Start Date       Project CF End Date       Project CF Starts       Award Type Descr       Agreement Type       Cost Share Flg        Select Value      Sele
	Sponsor Id     Sponsor Name     Award Start Date     Award End Date     Funding Source     CFDA #     SEFA Category     Sponsor Type      Select Value    Select Valu
Advanced Filters	
	Apply Filters Reset Filters

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

**<u>Periods</u>**—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.

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