CSUSM CFS Data Warehouse
Reporting Training Manual
Campus Programs

Last Revised: **2/09/16**

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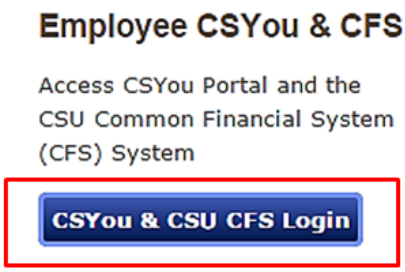
Introduction

Refer to CSUSM CFS Data Warehouse Reporting Training Manual All Business Units for detailed instructions on accessing the CFS Data Warehouse. Please visit the Finance DW page for these guides.

This guide is intended as a quick reference for Campus Programs reporting.

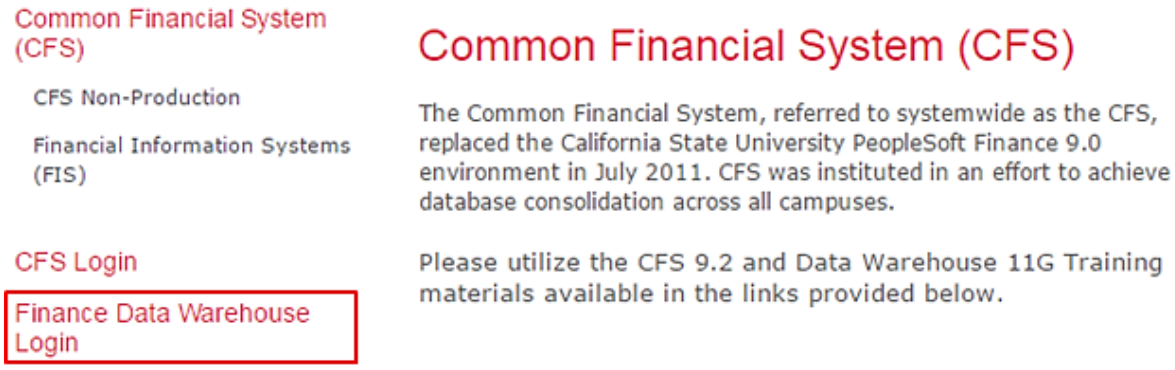
1.0 Logging into the CFS Data Warehouse System

1. Access your default browser window. Enter the URL – https://my.csusm.edu.
2. Click on the "CSYou & CSU CFS Login."



3. Enter your campus username and password and click **Login**.
4. Once you have successfully logged in, you will be directed to the Common Financial System (CFS) page.

   Click the **Finance Data Warehouse – Phase 2** link to access CFS Data Warehouse.



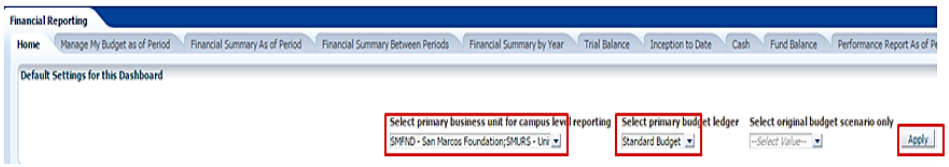
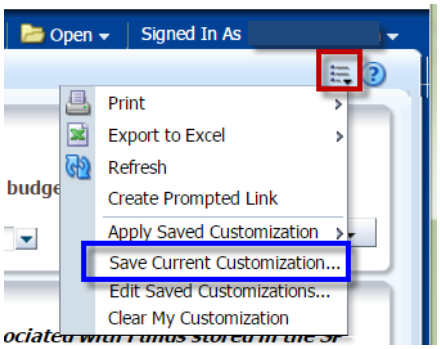
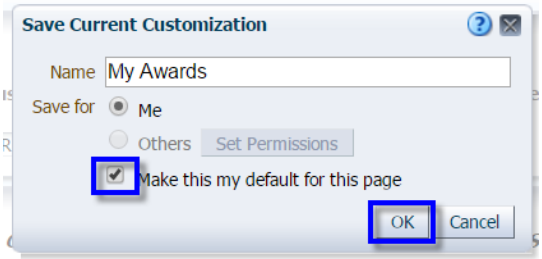
2.0 Financial Reporting Dashboard

Reports for Campus Programs are available through Data Warehouse Financial Reporting dashboard.

2.1 Accessing the Sponsored Programs Dashboard

Processing Steps / Field Name	Screenshot / Description
From the Dashboards dropdown menu, select the blue link to **Financial Reporting.**	

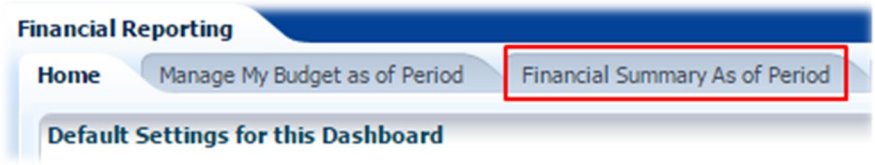
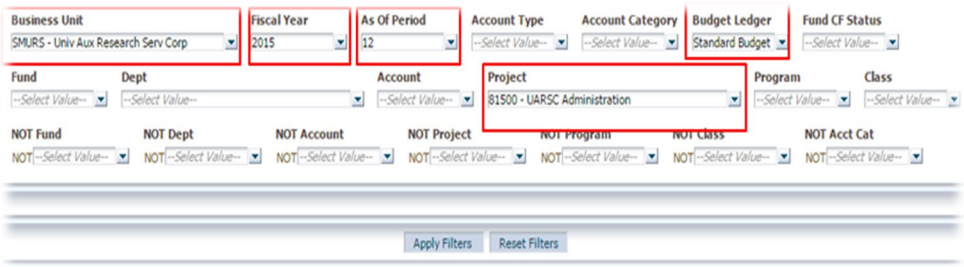
2.2 Selecting the Business Unit

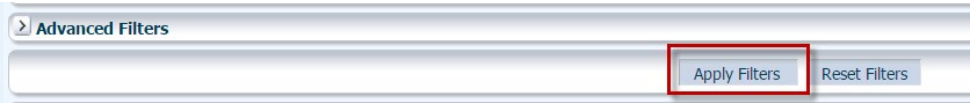
Processing Steps / Field Name	Screenshot / Description
1. Set the Business Unit to **SMURS or SMFND** on the Home Tab of the dashboard. 2. Select primary budget ledger = **Standard Budget** 3. Original Budget Scenario only = **leave blank** 4. Click the **Apply** button.	
1. Select the Page Options icon (located in the upper right hand corner). 2. Select **Save Current Customization**. 3. Enter the name you wish to call your default page (e.g. My Awards). 4. Check the "Make this my default for this page." 5. Select OK.	 

Processing Steps / Field Name	Screenshot / Description
6. Your defaults will be recognized in future sessions.	

3.0 Financial Summary as of Period - Filters

3.1 Report Filters

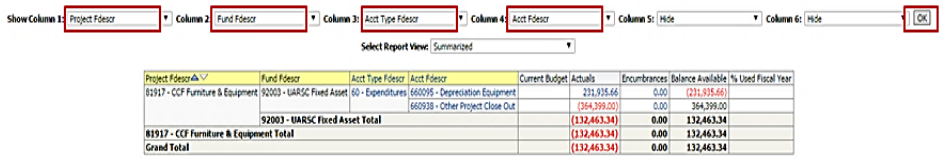
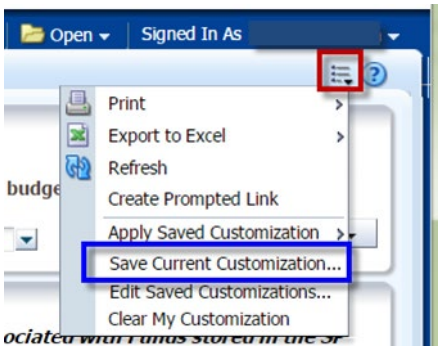
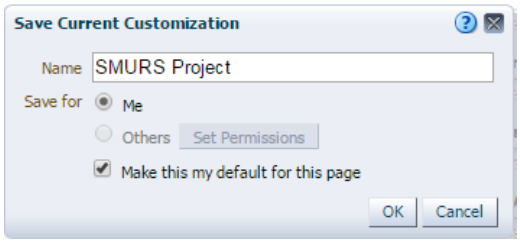
Processing Steps / Field Name	Screenshot / Description
From the Financial Reporting Home tab, select **Financial Summary As of Period** from the tab or the list of options.	
1. Report Filters section defaults to open status. Advanced is collapsed. 2. Business Unit and Budget Ledger defaults from saved Home customization. 3. Fiscal Year defaults to *current fiscal year*. 4. As of Period - select period ***12***. 5. Account Type – leave blank 6. Select the project number.	
Remove X from **Fund**. Click in Fund box and press delete key.	

Processing Steps / Field Name	Screenshot / Description
Select **Apply Filters** to retrieve report results.	

4.0 Financial Summary as of Period – Report Results

Report results are retrieved after filters are applied.

4.1 Report Results

Processing Steps / Field Name	Screenshot / Description
Modify the default report view. 1. From the **Column 1** dropdown menu, scroll down to select **Project Fdescr**. 2. **Column 2** – Select **Fund Fdescr**. 3. **Column 3** – Select **Acct Type Fdescr.** 4. **Column 4** – Select **Acct Fdescr.** 5. **Click Ok.**	
1. Save filters and report format by selecting the Page Options icon. 2. Select **Save Current Customization**. 3. Enter a report name (e.g. SMURS Project). 4. Check the "**Make this my default for this page**." 5. Select **OK**. 6. The next time the **Financial Summary As of Period** tab is accessed, report results will be generated automatically.