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 -	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	•
SEFDN - Univer • Apply Reset • Apply	Refresh Create Prompted Link	
** All Filters/Prompts are Fdescr (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 information and grant attributes) to facilitate the financial imanagement of externally funded amarks. The report filter contains defaults to account management, proprint as of ficial provides and and the second and the	Edit Saved Customizations	
	Clear My Customization	s
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	nt 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 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, 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
Home Manage My Grant Grant Admin Award Attributes
Report Filters
Business Unit Fiscal Year Period (as of) Account Type Account Category Budget Ledger SBFDN = University Enterprises Corp. 2023 212 60 - Expenditu Select Value Standard Budg
Fund Dept Account Project Program Class Fund CF Status CSU Fund Select Value <t< th=""></t<>
PIName Post Awd Admin Project CF Start Date Project CF End Date Project CF Status Award Type Descr Agreement Type Cost Share Fig Select Value Selec
Sponsor Id Sponsor Name Award Start Date Award End Date Funding Source CFDA # SEFA Category Sponsor Type Select Value -
▶ Advanced Filters
Apply Filters Deset 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.