CSUF Data Warehouse
Budget Management Dashboard

presented by IT Training & Support

AGENDA

| Data Warehouse Overview | Available Reports | Training & Support | Demo | Checklist & Questions |

What is a Data Warehouse?

A data warehouse is an online repository for information. The CSUF Data Warehouse combines data from several different campus databases in one location and allows end users to view, filter, and search the information.

What is a Dashboard?

A Dashboard is a grouping of data warehouse information based on specific criteria. Dashboards are created by the campus for specific needs, such as the Purchasing Dashboard which allows users to query purchase requisition information.

How do I access the CSUF Data Warehouse?

Campus users can access the CSUF Data Warehouse by logging into their campus portal. Select the Titan Online tab and then select the OBIEE 11g - BI/Dashboards link.

Where can I find user guides and tutorials on Data Warehouse?

You can find all available Data Warehouse training materials on the Resource Planning training resources page at resourceplanning.fullerton.edu/pbps/

Baseline Position Budget

- Baseline Salary Budget Roster that pulls baseline salary budget and compares with official employee compensation rate that translates to annual salaries in support of a budget plan. Also referred to as Annual Position Roster.

Total Budget All Employees

- Position Roster for all employees, not just permanent ones funded from Baseline and One-Time funding. Although detailed position information is only available for salaried employees based on annual salary, you can see the allocated budget for temporary help (including fiscal year renewals), student assistants, and other non-permanent employees.

FY Salary Budget

- Identifies budget need from a Current Fiscal Year Planning Perspective (accounts for the impact of changes throughout the fiscal year) using actual YTD payroll (including stipends/lump sum payments and overtime). Shows detail of Department Position Budget for each position.

FY Salary Detail

- Same as FY Salary Budget but shows detail of YTD payroll per employee.

FY Salary and OEE Budget

- This report shows your current balance for all of your transactions (both salary and non-salary transactions) and projections for payroll expenses.

Financial Summary By Year

- This report groups together all revenue and expenditures by account type and category to give an overall summary for a single fiscal year or a range of fiscal years.

Budget Projection by Source

- This report shows expenditure projections through the end of the fiscal year for salaries, benefits, OE&E, and revenue, from all funding source(s) that may be applied to those line items, and the net difference.

Budget Projection by Category

- This report shows expenditure projections through the end of the fiscal year broken down by fund and program. It also breaks down the projections by expenditure category and shows the surplus/deficit.

Budget Transaction Details

- Detail report of all of your budget transactions (both salary and non-salary transactions) such as initial baseline budget load, benefits load, budget transfers, carry forward, etc.

Employee Salary Projection

- Shows salary projections for specific employees; similar to the Salary Expenditure (SEP) report.

Open Labs
By appointment; email larthur@fullerton.edu

Training Guides
resourceplanning.fullerton.edu/pbps

Technical Support
IT Help Desk
helpdesk@fullerton.edu
657/278-7777

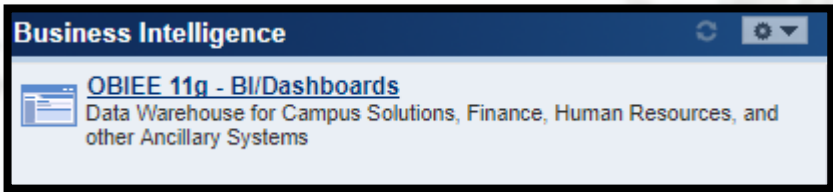**Budget Management Reports**
DL-Budget
budget@fullerton.edu

To access Data Warehouse:

1. Open web browser
2. Sign in to your campus portal
3. Select Titan Online
4. Click Titan Online button
5. Locate Business Intelligence section and click **OBIEE 11g – BI/Dashboards**

Business Intelligence

OBIEE 11g - BI/Dashboards
Data Warehouse for Campus Solutions, Finance, Human Resources, and other Ancillary Systems

Checklist

Questions?