What is OpenBook?
OpenBook is a data visualization tool that enables the University’s financial data to be shared more frequently with interactive charts and graphs.

What is the purpose of OpenBook?
OpenBook will increase clarity across campus by having financial information readily available for people to access when they need it.

How do I navigate OpenBook?
Please refer to the Navigation Guide section below.

What happened to the old Campus Budget Report?
In an effort to move to a more responsive and interactive platform, the reports on OpenBook will replace the old format of the Campus Budget Plan. However, pdf versions of the Campus Budget Reports for previous years can be found on our website at https://web.sonoma.edu/budget/campus-budget-plan.html.

Who can I contact if I have questions?
You can contact University Budget and Planning by emailing budget@sonoma.edu with any questions.
Glossary of Terms

**Base Budget:** A unit’s permanently allocated budget for each fiscal year.

**Campus Budget:** The Campus Budget is composed of the combination of the Operating Fund Budget and the Cost Recovery Budget.

**Contingency:** An ongoing, base budgeted source of funding that is not committed for a specific purpose. The contingency is used for annual unexpected costs or strategic needs.

**Cost Recovery:** Cost Recovery standards are set by Executive Order 1000, and requires campuses to “Ensure that costs incurred in the CSU Operating Fund for services, products and facilities provided to other CSU Funds and Auxiliary Organizations are properly and consistently recovered with cash and/or a documented exchange of value.” Allowable direct costs incurred by the campus shall be allocated and recovered based on actual costs incurred, such as chargebacks or billing requests. Allowable indirect costs shall be allocated and recovered according to a cost allocation plan.

**FTE:** Full-time equivalent count of campus employees.

**One-Time Budget:** Funding that is not a part of the base budget and is not a permanent allocation each year. Examples include roll-forward balances, one-time allocations from the Chancellor’s Office, and reserve distributions.

**Operating Fund:** The Operating Fund consists of funding from the state appropriation, and student fees, primarily tuition fee revenue.

**Reserve:** An accumulation of unused funds set aside for economic uncertainties, unexpected losses, or planning purposes. Reserve funds are one-time in nature.

**Revised Budget:** A unit’s revised budget is the base budget and any one-time budget allocations for the year. The revised budget is the total spending authority for the year.

**Year-End Balances:** Prior year unused balances that are shifted to the following year’s budget. Year-end balances may be used for one-time needs or set aside as reserves.

**Self-Support/Auxiliaries:** The units included under the Self-Support/Auxiliary report are Housing, Transportation and Parking Services, School of Extended and International Education, Campus Life Operations, Office of Research and Sponsored Programs, Lottery Funds, Instructionally Related Activities (including permanently funded programs: Athletics, Center for Performing Arts, and Library), Student Health Center, Counseling and Psychological Services, Green Music Center Presenting, Sonoma State University Foundation, Associated Students, and Sonoma State Enterprises, Inc.

**University Budget:** The University Budget is comprised of the Campus Budget and the Self-Support/Auxiliaries Budgets.
# Navigation Guide

## I. Accessing a Report

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To view OpenBook reports, go to [https://www.sonoma.openbook.questica.com](https://www.sonoma.openbook.questica.com)

Each report is a tile under the **Select a Visualization to Explore**

An example of these tiles is shown in the screenshot to the right, though may differ on your screen.

To view a report, select the tile you wish to view.

You can click anywhere within the tile, an example is highlighted in red on the screenshot to the right.
## II. Exploring a Report

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Once you have selected a report to view, the default screen will produce a bar graph. The screenshot to the right shows an example of this.

Each OpenBook report has multiple views. To flip between the bar graph, pie chart, and data table, use the tabs at the top of the screen (highlighted in red on the screenshot to the right).
The Summary View in OpenBook shows the data in table format.

Select reports have the functionality to drill down to multiple levels.
You can drill on any line that produces an underline when you hover the cursor over it.

Each level shows how the report is broken down (highlighted in red).
III. Navigating Back to Home Screen or Previous Report Levels

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|      | ![Image](image2.png) | To return to a previous level in a report, you can use the arrow bar, located under the Report title at the top of the screen (highlighted in red). |
You can select any of the options to return to the drill. An example is highlighted in red on the screenshot.

This will return you to the selected report level.
IV. Exporting Data

Should you want to export the data included in this report, at any screen you can select the **Data Export** button in the bottom left corner of the report (highlighted in red on the screenshot to the right).

The data file will provide everything for the report in one file as a CSV file.