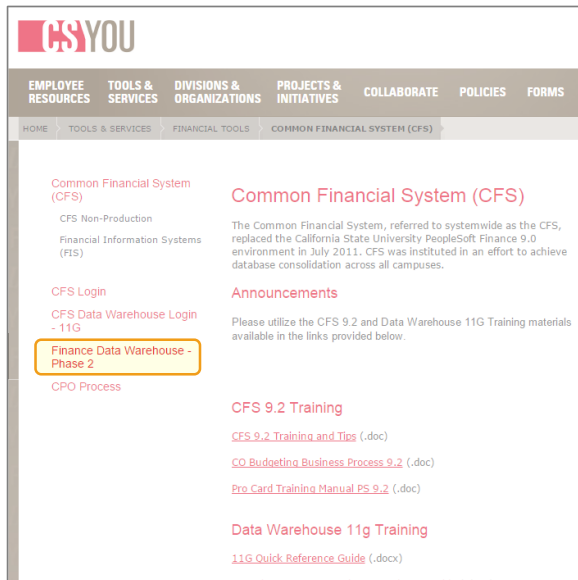




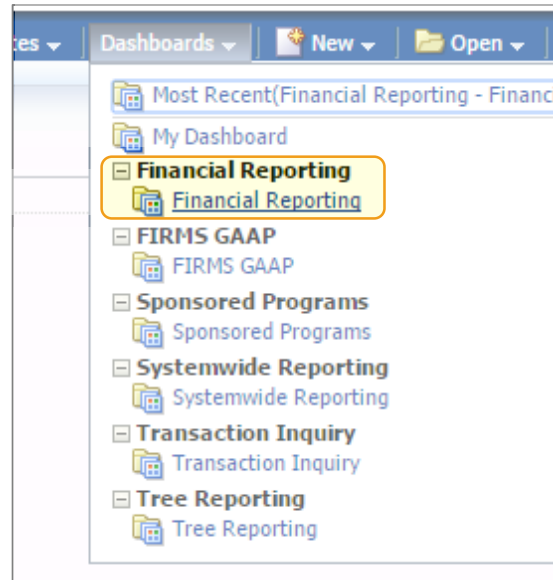
Data Warehouse Phase II Tutorials

How to access and log-in to Data Warehouse:

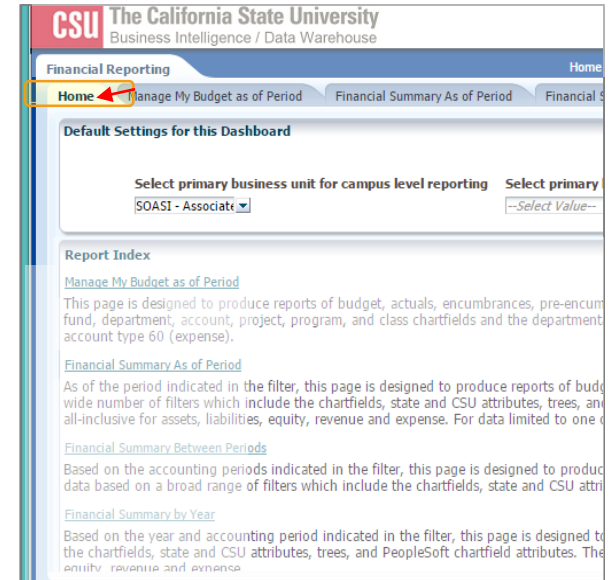
Step 1: Log into Finance, then click on Phase 2



Step 2: Select the Financial Reporting Dashboard

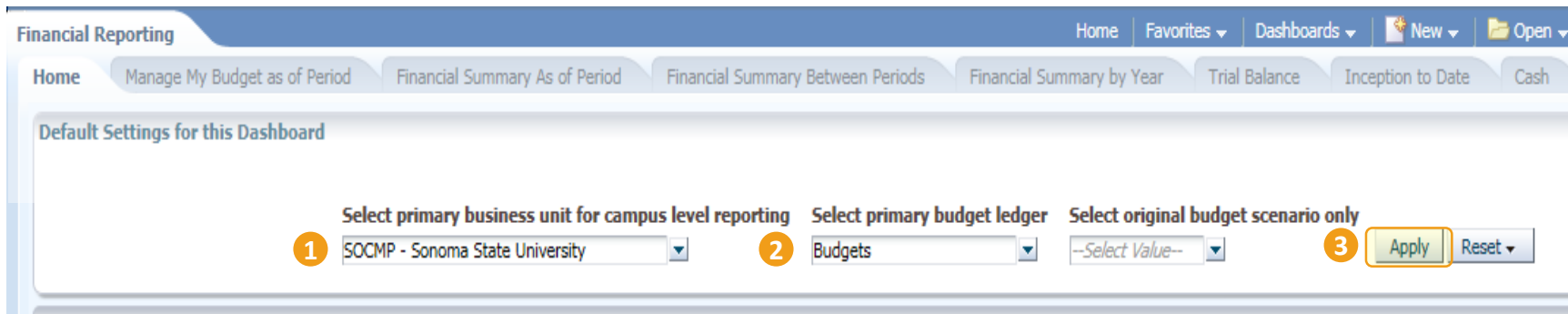


Step 3: Choose "Home" Page



Setting up your default settings:

Step 1: After logging into the Financial Reporting Dashboard, set-up Business Unit SOCMP – for Sonoma State Campus



Financial Reporting

Home | Favorites | Dashboards | New | Open

Home | Manage My Budget as of Period | Financial Summary As of Period | Financial Summary Between Periods | Financial Summary by Year | Trial Balance | Inception to Date | Cash

Default Settings for this Dashboard

Select primary business unit for campus level reporting: 1 SOCMP - Sonoma State University

Select primary budget ledger: 2 Budgets

Select original budget scenario only: 3 --Select Value--

Apply | Reset

Step 2: Select the primary ledger you will be pulling your reports from, which should be “Budgets” to account for both actual and budget totals.

Step 3: Click “Apply Filters”. This will allow you to run reports in Data Warehouse without resaving your default parameters every time. You are now ready to begin extracting reports from the Data Warehouse.