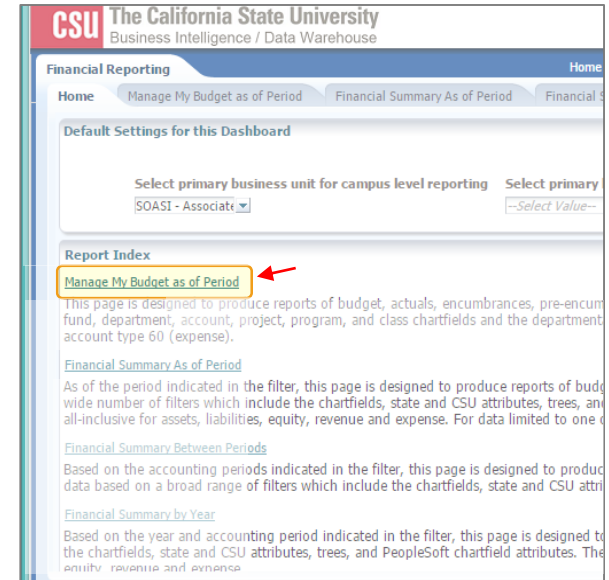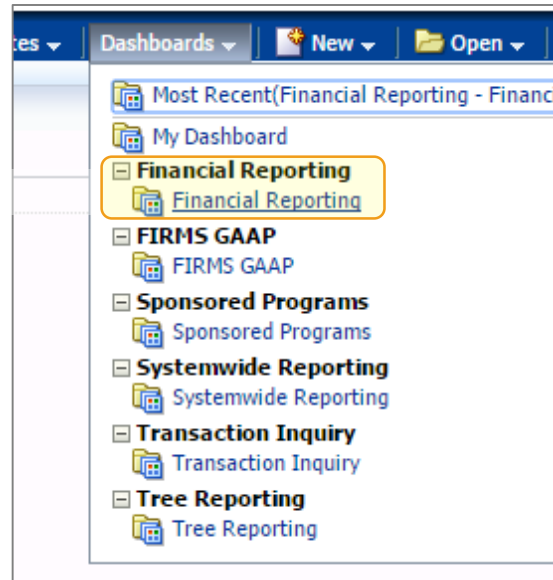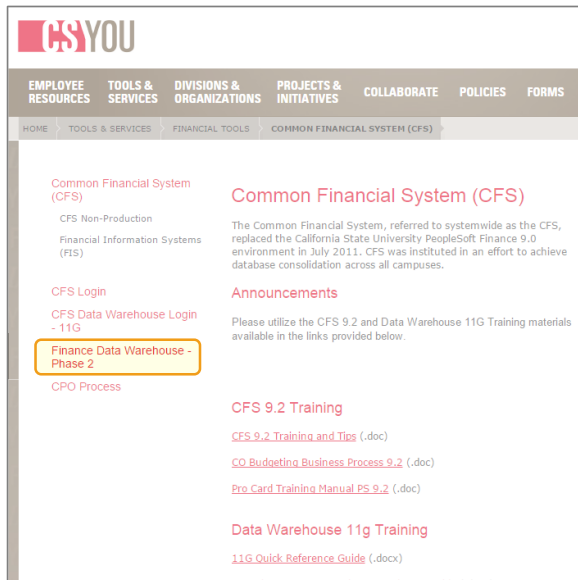# Data Warehouse Phase II Tutorial

How to Access Revenue/Expense Reports per Department:

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

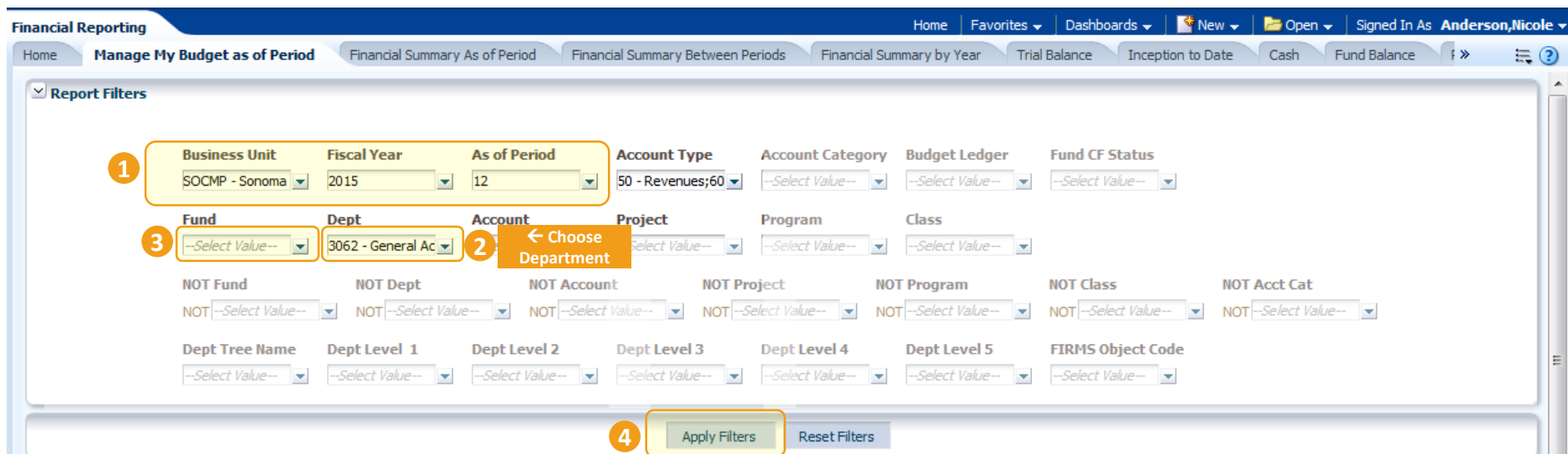**Step 2:** Select the Financial Reporting Dashboard

Step 3: Choose "Manage My Budget as of Period"

Data Warehouse Phase II Tutorial

How to Access Revenue/Expense Reports per Department:

Step 1: After logging into Manage My Budget, verify your Business Unit, Fiscal Year, and Period (leave period at 12 to get current data)

Step 2: Select the department you want to see. Just click the dropdown arrow and choose one or click more to search.

Step 3: Delete the "X" in the Fund field. Leave this box blank unless you want to include a specific Fund.

Step 4: Click "Apply Filters" and wait for the report to load.

Data Warehouse Phase II Tutorial

How to Export Report to Excel:

Step 1: After you apply filters, you will see a report appear at the bottom of your screen. Here you can review your revenues and expenses per period or current if you selected period 12.

Manage My Budget - As of Period

Business Unit = **SOCMP - Sonoma State University**, Fiscal Year = **2015**, Period = **12**

Time run: 11/12/2015 8:58:58 AM

Show Column 1: Fund Fdescr | Column 2: Dept Fdescr | Column 3: Account Fdescr | Column 4: Hide | Column 5: Hide | Column 6: Hide | OK

Select Report View: Summarized

Fund Fdescr △▽	Dept Fdescr	Account Fdescr	Current Budget	Actuals	Encumbrances	Balance Available	% Used Fiscal Year
RB001 - Trust_Perkins	3062 - General Accounting Unit	660885 - Other Coll Costs		162.00	0.00	(162.00)	
	3062 - General Accounting Unit Total			**162.00**	**0.00**	**(162.00)**	
RB001 - Trust_Perkins Total				**162.00**	**0.00**	**(162.00)**	
SO100 - CSU Operating Fund	3062 - General Accounting Unit	601201 - Management And Supervisory	236,412.00	78,109.05	0.00	158,302.95	33%
		601300 - Support Staff Salaries	118,140.00	57,052.00	0.00	61,088.00	48%
		603001 - Oasdi	7,274.55	7,274.55	0.00	0.00	100%
		603003 - Dental Insurance	2,264.80	2,264.80	0.00	0.00	100%
		603004 - Health And Welfare	25,512.72	25,512.72	0.00	0.00	100%
		603005 - Retirement	33,999.10	33,999.10	0.00	0.00	100%
		603011 - Life Insurance	138.00	138.00	0.00	0.00	100%
		603012 - Medicare	1,930.00	1,930.00	0.00	0.00	100%
		603013 - Vision Care	157.40	157.40	0.00	0.00	100%
		603014 - Long-Term Disability Insurance	46.56	46.56	0.00	0.00	100%
	3062 - General Accounting Unit Total		**425,875.13**	**206,484.18**	**0.00**	**219,390.95**	**48%**
SO100 - CSU Operating Fund Total			**425,875.13**	**206,484.18**	**0.00**	**219,390.95**	**48%**

Step 2: You can export these numbers to Excel by selecting "Export" at the bottom of the DW report selecting Excel.

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	Excel	← Choose Excel
	Powerpoint	▸
	Web Archive (.mht)
	Data	▸

Refresh - Print - Export