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”
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.
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.

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