CSUSM CFS Data Warehouse Reporting Training Manual Sponsored Projects Awards

Last Revised: **1/20/16**

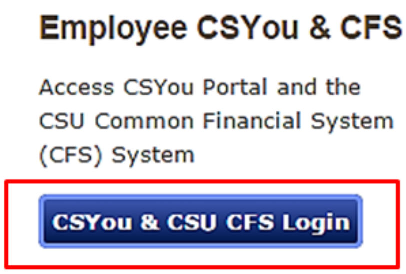
Table of Contents

Introduction

Refer to CSUSM CFS Data Warehouse Reporting Training Manual All Business Units for detailed instructions on accessing the CFS Data Warehouse. This guide is intended as a quick reference for Awards reporting in the Manage My Grant tab on the Sponsored Programs dashboard.

1.0 Logging into the CFS Data Warehouse System

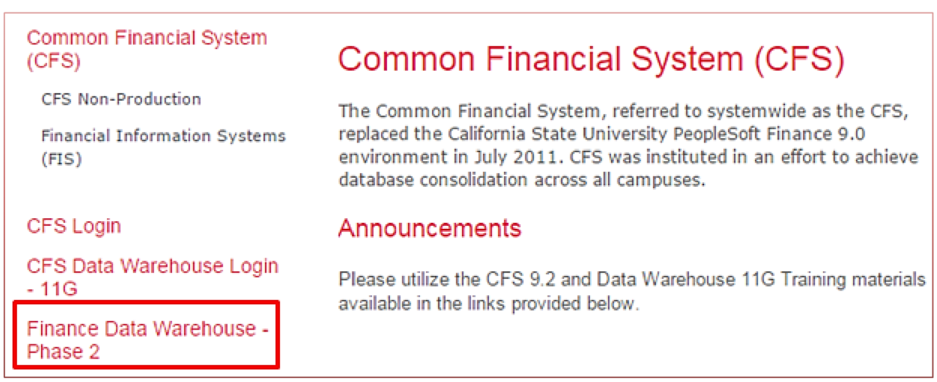
1. Access your default browser window. Enter the URL – https://my.csusm.edu.
2. Click on the “CSYou & CSU CFS Login.”



3. Enter your campus username and password and click **Login**.

4. Once you have successfully logged in, you will be directed to the Common Financial System (CFS) page.

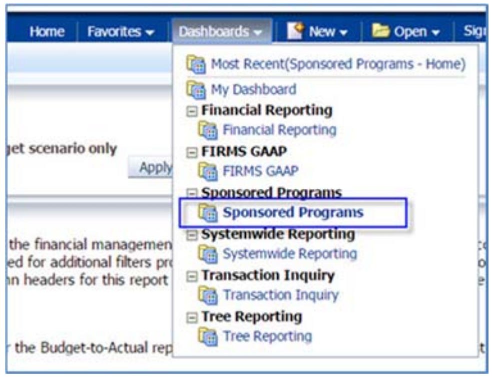
   Click the **Finance Data Warehouse – Phase 2** link to access CFS Data Warehouse.



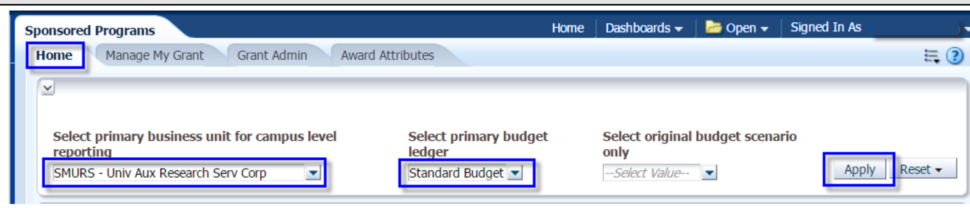
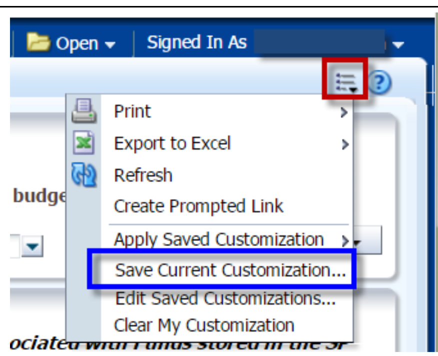
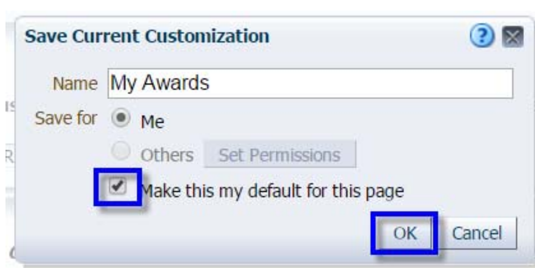
2.0 Sponsored Programs Dashboard

Grants are administered in the CFS Sponsored Programs module. Reports for grants are available through Data Warehouse Sponsored Programs Dashboard.

2.1 Accessing the Sponsored Programs Dashboard

Processing Steps / Field	Screenshot / Description
From the Dashboards dropdown menu, select the blue link to **Sponsored Programs.**	

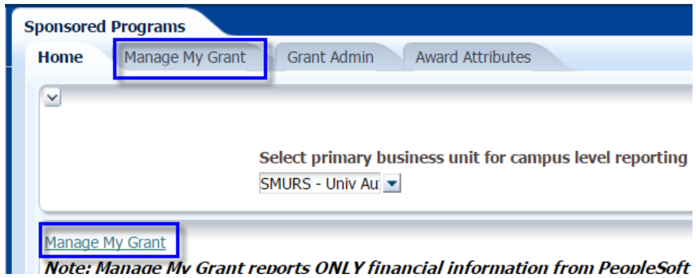
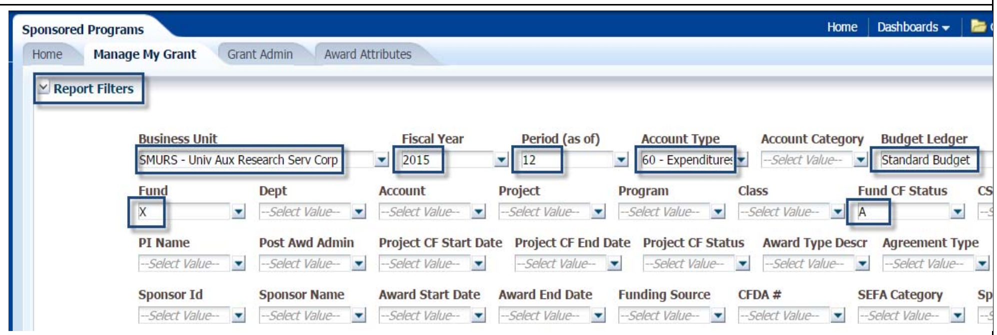
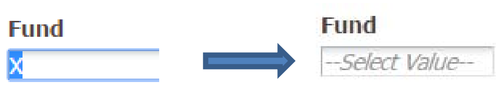
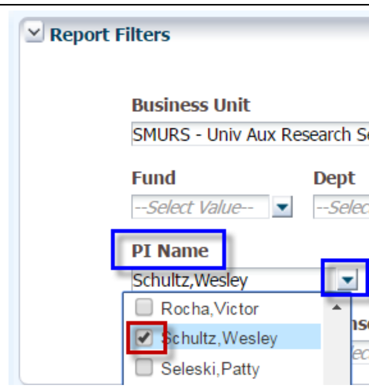
2.2 Selecting the Business Unit

Processing Steps / Field Name	Screenshot / Description
1. Set the Business Unit to **SMURS** on the Home Tab of the dashboard. 2. Select primary budget ledger = **Standard Budget** 3. Original Budget Scenario only = **leave blank** 4. Click the **Apply** button.	
1. Select the Page Options icon  (located in the upper right hand corner). 2. Select **Save Current Customization**. 3. Enter the name you wish to call your default page (e.g. My Awards). 4. Check the "Make this my default for this page." 5. Select OK. 6. Your defaults will be recognized in future sessions.	

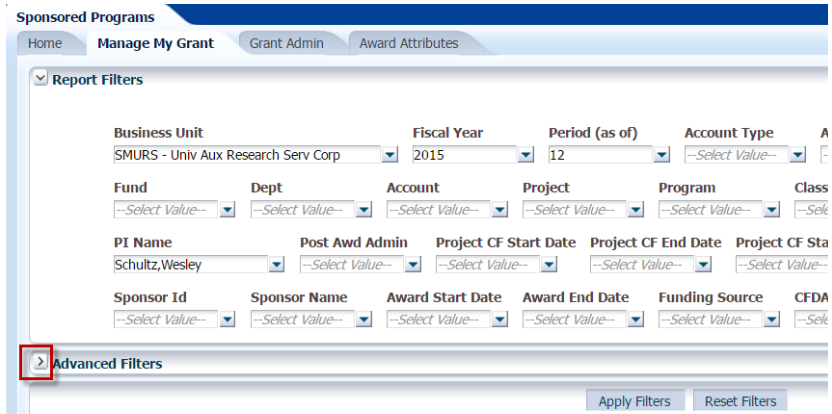
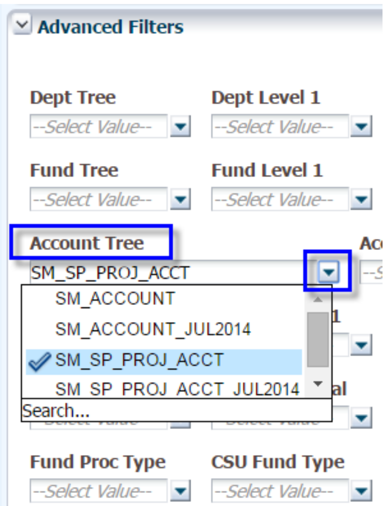
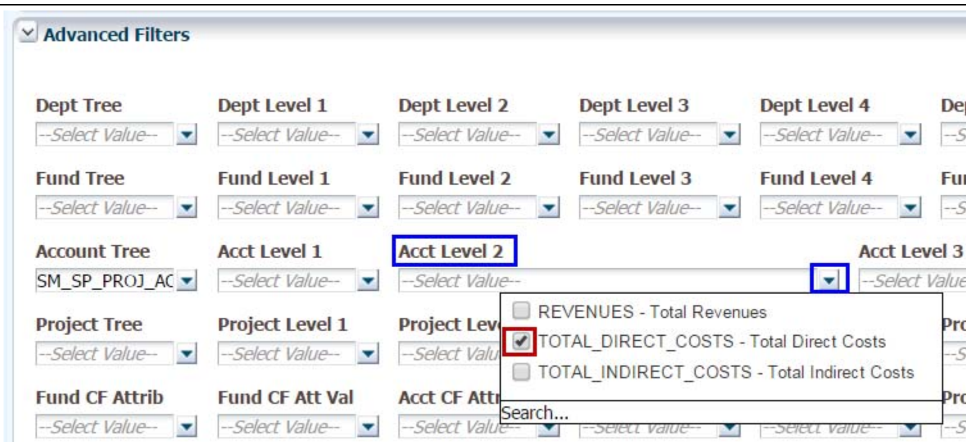
3.0 Manage My Grant - Filters

Award reporting parameters can be limited by PI Name.

3.1 Report Filters

Processing Steps / Field	Screenshot / Description
From the Sponsored Programs Home tab, select **Manage My Grant** from the tab or the list of options.	
1. Report Filters section defaults to open status. Advanced is collapsed. 2. Business Unit and Budget Ledger defaults from saved Home customization. 3. Fiscal Year defaults to *current fiscal year*. 4. As of Period defaults to end of year, period ***12***. 5. Account Type defaults to ***60 – Expenditures***. 6. Fund CF Status defaults to ***A****ctive*.	
Remove X from **Fund**. Click in Fund box and press delete key.	
Select your name from the **PI Name** dropdown box. Note: After selecting a value, click anywhere outside of the dropdown box to set selection and move to another field.	

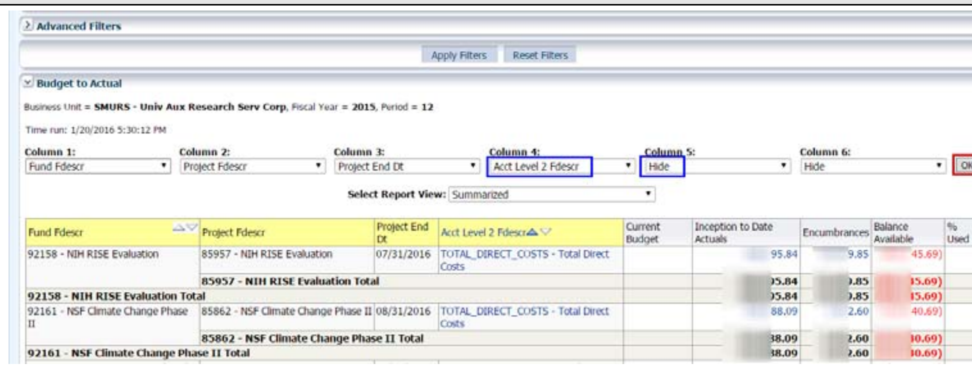
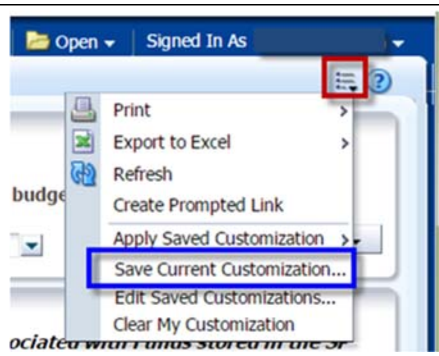
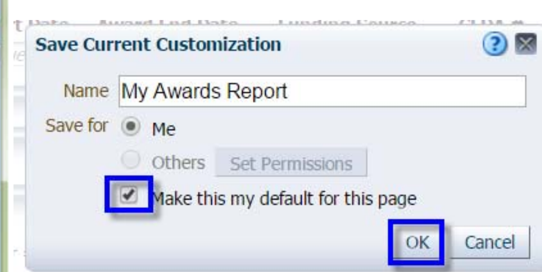
3.2 Advanced Filters

Processing Steps / Field	Screenshot / Description
Expand the **Advanced Filters** section by clicking the arrow. 	
From the **Account Tree** dropdown menu, select **SM_SP_PROJ_ACCT**	
From the **Acct Level 2** dropdown menu, select **TOTAL_DIRECT_COSTS**	
Collapse Advanced Filters section for a cleaner look by clicking the arrow.  Select **Apply Filters** to retrieve report results.	

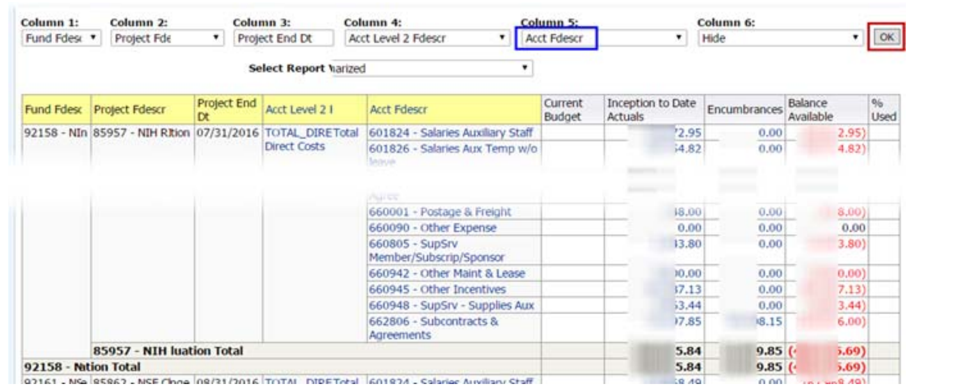
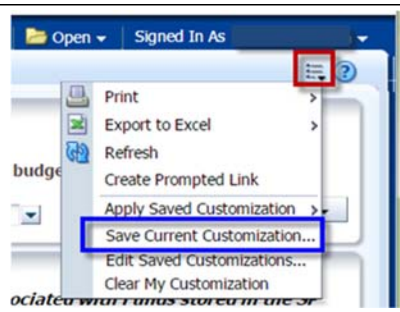
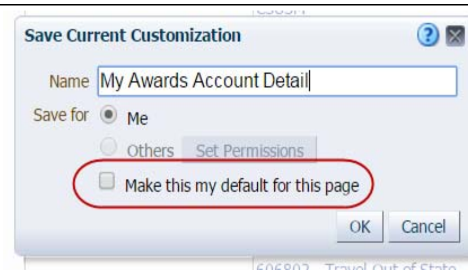
4.0 Manage My Grant – Report Results

Report results are retrieved after filters are applied.

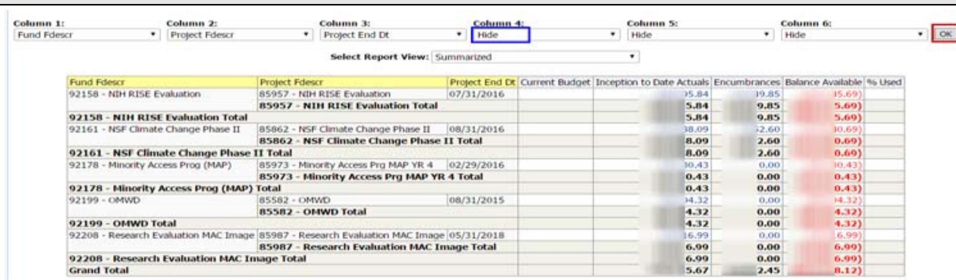
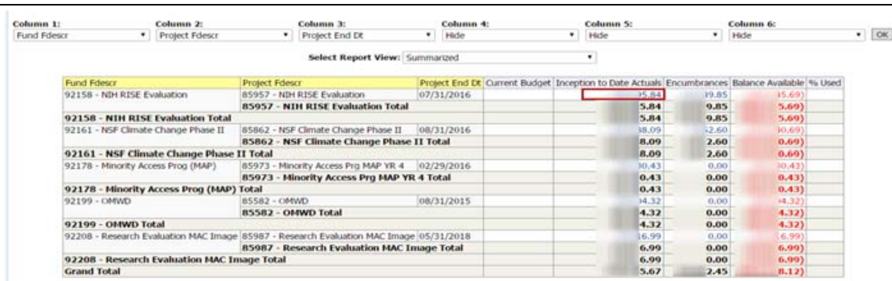
4.1 Direct Costs by Fund and Project

Processing Steps / Field	Screenshot / Description
Modify the default report view for Cost Summary. 1. From the **Column 4** dropdown menu, scroll down to select **Acct Level 2 Fdescr**. 2. Select **Hide** from the **Column 5** dropdown menu. 3. Click **OK**.	
1. Save filters and report format by selecting the Page Options icon.  2. Select **Save Current Customization**. 3. Enter a report name (e.g. My Awards Report). 4. Check the "**Make this my default for this page**." 5. Select **OK**. 6. The next time the **Manage My Grant** tab is accessed, report results will be generated automatically.	 

4.2 Direct Cost Account Detail

Processing Steps / Field	Screenshot / Description
Modify the report view to include Account Detail. 1. From the **Column 4** dropdown menu, scroll down to select **Acct Level 2 Fdescr**. 2. Select **Acct Fdescr** from the **Column 5** dropdown menu. 3. Click **OK**.	
Save Current Customization as described in previous section. Check box to make default report or leave unchecked to save as another report option to apply.	 

4.3 Direct Cost Transaction Detail

Processing Steps / Field Name	Screenshot / Description
Modify the Direct Cost Summary Report retrieved in the section 4.1 to summarize by Project. 1. Select **Hide** from the **Column 4** dropdown menu. 2. Click **OK**.	
To retrieve details for a Project, click on the blue number in the **Inception to Date Actuals** column.	
Refer to CSUSM CFS Data Warehouse Reporting Training Manual All Business Units for detailed instructions on using the drill down report.