FINANCE DATA WAREHOUSE

# BASIC REPORTING

Outline

CSU Bakersfield

## Overall Aim:

To teach you the basic financial management concepts and basic operations for running reports, customizing reports, saving your customizations, and exporting data to Excel.

## Intended Audience

Any CSUB Faculty, Staff, or Student worker, who is responsible for reconciling or monitoring budgets.

## Duration

Approximately 120 minutes

## Format

Direct instruction, guided practice, and independent practice

## Lesson Objectives

At the end of the session, the participants will be able to:

- Distinguish between our financial system and reporting environment
- Recognize basic financial management terms and best practices
- Navigate to a report using different dashboards
- Save customized reports and default settings for dashboards
- Run different reports using the 5 step process
- Select report filters based on your stateside fund, non-stateside fund, grant, or project
- Refine reports by applying more filters
- Apply different report views
- Drill down on activity for more detail
- Distinguish ProCard Transaction from other transactions
- Enhance reports by adding subtotals and excluding columns
- Export data to Excel
- Find assistance on budget information

## Reflective Questions

- When should I reconcile my budget?
- What type of reports can I run in the Finance Data Warehouse?
- How can I customize my report to make it more meaningful?
- How can I get more detail about specific budget information?

## Course Information

For more information about this class, please visit the Introduction to Finance Data Warehouse website:

www.csub.edu/training/pgms/fdwp2/index.html

## Registration Information

To register for this class, please use the Online Registration website: http://pstraining.csub.edu

## Contact Information

Dr. Tammara Sherman
Campus Technology Trainer
Campus Training

661-654-6919
tsherman@csub.edu
www.csub.edu/training/index.html