

CFS Data Warehouse Training: Manage My Budget

Presented by
University Budget Office

A decorative graphic consisting of several horizontal lines of varying thicknesses, including a thick grey line and several thin white lines, extending across the right side of the slide.

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Purpose

- To guide users on best practices for running a standard report using the “Manage My Budget as of Period” tab in the Financial Reporting Dashboard of CFS Data Warehouse



The screenshot shows the top navigation area of the Financial Reporting Dashboard. It features the CSU logo and the text 'The California State University Business Intelligence / Data Warehouse'. Below this is a 'Financial Reporting' section with a horizontal menu of navigation tabs. The 'Manage My Budget as of Period' tab is highlighted in yellow.

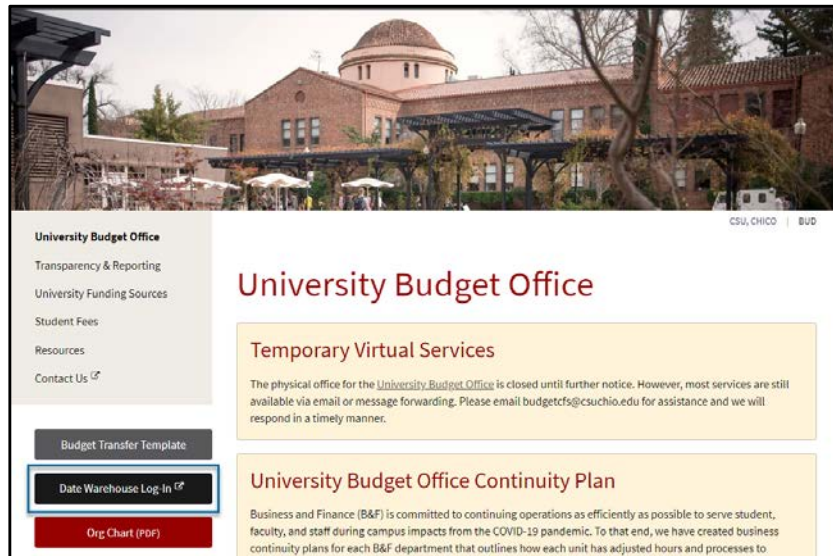
CSU The California State University
Business Intelligence / Data Warehouse

Financial Reporting

[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 Reports](#) [Cash](#) [Fund Balance](#) [Performance Report As of Period](#)

Logging into Data Warehouse

- Visit the University Budget Office's website at www.csuchico.edu/bud
- Click on the "Date Warehouse Log-In" Button
- Once you're on the CSYOU page click on the "CFS Data Warehouse" Button
- You'll then use your Chico State credentials to log-in



University Budget Office

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University Funding Sources
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[Budget Transfer Template](#)

[Date Warehouse Log-In](#)

[Org Chart \(PDF\)](#)

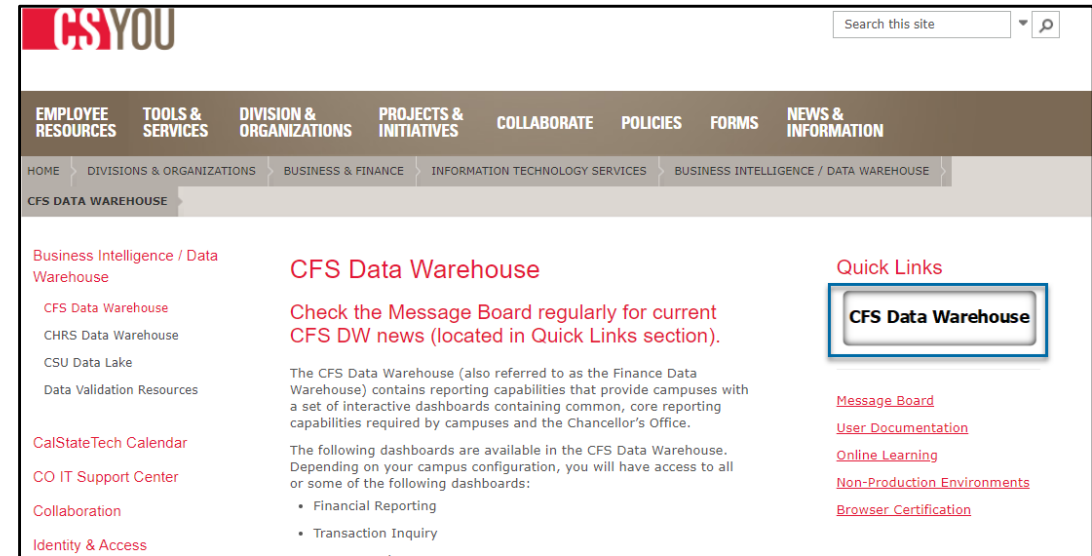
University Budget Office

Temporary Virtual Services

The physical office for the [University Budget Office](#) is closed until further notice. However, most services are still available via email or message forwarding. Please email budgetcfs@csuchico.edu for assistance and we will respond in a timely manner.

University Budget Office Continuity Plan

Business and Finance (B&F) is committed to continuing operations as efficiently as possible to serve student, faculty, and staff during campus impacts from the COVID-19 pandemic. To that end, we have created business continuity plans for each B&F department that outlines how each unit has adjusted hours and processes to



CSYOU

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CFS Data Warehouse

Check the [Message Board](#) regularly for current CFS DW news (located in [Quick Links](#) section).

The CFS Data Warehouse (also referred to as the Finance Data Warehouse) contains reporting capabilities that provide campuses with a set of interactive dashboards containing common, core reporting capabilities required by campuses and the Chancellor's Office.

The following dashboards are available in the CFS Data Warehouse. Depending on your campus configuration, you will have access to all or some of the following dashboards:

- Financial Reporting
- Transaction Inquiry

Quick Links

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[Online Learning](#)

[Non-Production Environments](#)

[Browser Certification](#)

Setting Defaults

Date Warehouse Home Page

CSU The California State University
Business Intelligence / Data Warehouse

Home

CSU The California State University
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MADE in the CSU

Financial Reporting

Transaction Inquiry

The Data Warehouse is current as of:
14-OCT-19 02:00 AM

Dashboards

- **Financial Reporting** is the dashboard for running Account Balance reports
 - **Transaction Inquiry** is the dashboard for Transactional reports
- This power point focuses on running a report within the “Financial Reporting” dashboard
- Click on “Financial Reporting”

Setting default

The screenshot shows the 'Financial Reporting' dashboard. At the top right, there is a navigation bar with 'Home', 'Dashboards', 'Open', and 'Signed In As Joyner, Rebecca'. Below this is a breadcrumb trail: '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 Reports > Cash > Fund Balance > Performance Report As of Perio'. A gear icon in the top right corner is highlighted with a blue box. Below the breadcrumb trail is a section titled 'Default Settings for this Dashboard'. It contains three dropdown menus: 'Select primary business unit for campus level reporting' (set to 'CHICO - Califo'), 'Select primary budget ledger' (set to '--Select Value--'), and 'Select original budget scenario only' (set to '--Select Value--'). There are 'Apply' and 'Reset' buttons to the right of these dropdowns. Below the settings is a note: '** All report Prompts/Filters are Fdescr (Field + Description) **'. At the bottom left, there is a 'Report Index' section with a link to 'Manage My Budget as of Period'. On the right side of the dashboard, there is a vertical menu with options: 'Print', 'Export to Excel', 'Refresh', 'Create Prompted Link', 'Apply Saved Customization', and 'Save Current Customization...'. The 'Save Current Customization...' option is highlighted.

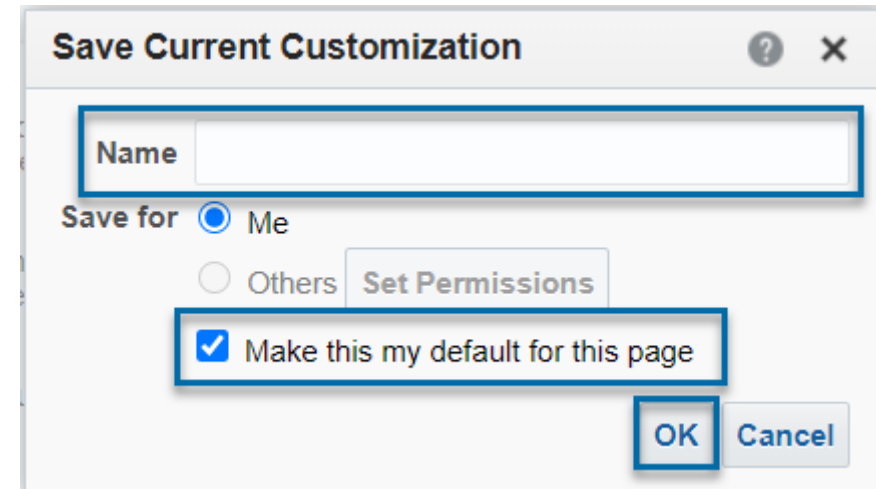
- **Primary Business Unit - Chico**
- **Primary Budget ledger – Budgets**
- **Select the setting wheel in the top right corner**
- **Click on Save Current Customization**

Setting default

How To:

- Name – Default
- Check the “Make this my default for this page
- Click ok

Example



Helpful Hints for Selecting Filters

Example: "As of Period"

Financial Reporting

Home **Manage My Budget as of Period** Financial Summary As of Period Financial Summary Between Periods

Report Filters

Business Unit	Fiscal Year	As of Period	Account Type
CHICO - Califor ▼	2019 ▼	12 ▼	50 - Revenues; ▼
Fund	Dept		Project
X ▼	--Select Value-- ▼		e-- ▼ --Select Valu
NOT Fund	NOT Dept ID		T Account
NOT --Select Value-- ▼	NOT --Select Va		T --Select Value-- ▼
Dept Tree Name	Dept Level 1		Dept Level 3
--Select Value-- ▼	--Select Value-- ▼	Search... e-- ▼	--Select Valu

How To:

Report selections can be set using the drop-down arrow and select the value from the list provided

Common Examples:

- Fund
- As of Period
- Account Type
- Dept Tree Name
- Not Acct Cat

Helpful Hints for Advance Filter Search

How To:

- Some filters have many values to scroll through in the list provided
- Instead, hit the More/Search...

Example: "Dept"

Financial Reporting

Home **Manage My Budget as of Period** Financial Summary As of Period Financial Summary Between Periods Financial Summary Between Periods

Report Filters

Business Unit	Fiscal Year	As of Period	Account Type	Account
CHICO - Califor	2019	12	50 - Revenues;	--
Fund	Dept			
X	--Select Value--			
NOT Fund				
NOT --Select Value--				
Dept Tree Name				
--Select Value--				

-
 01001 - CASH ADMINISTRATION
 01002 - FOUNDATION ADMINISTRATION
 01003 - Recovered Costs-Grants & Contr
 01005 - BOARD OF GOVERNOR DESIGNATIONS
 01006 - CONTRACTS & GRANTS DESIGNATION

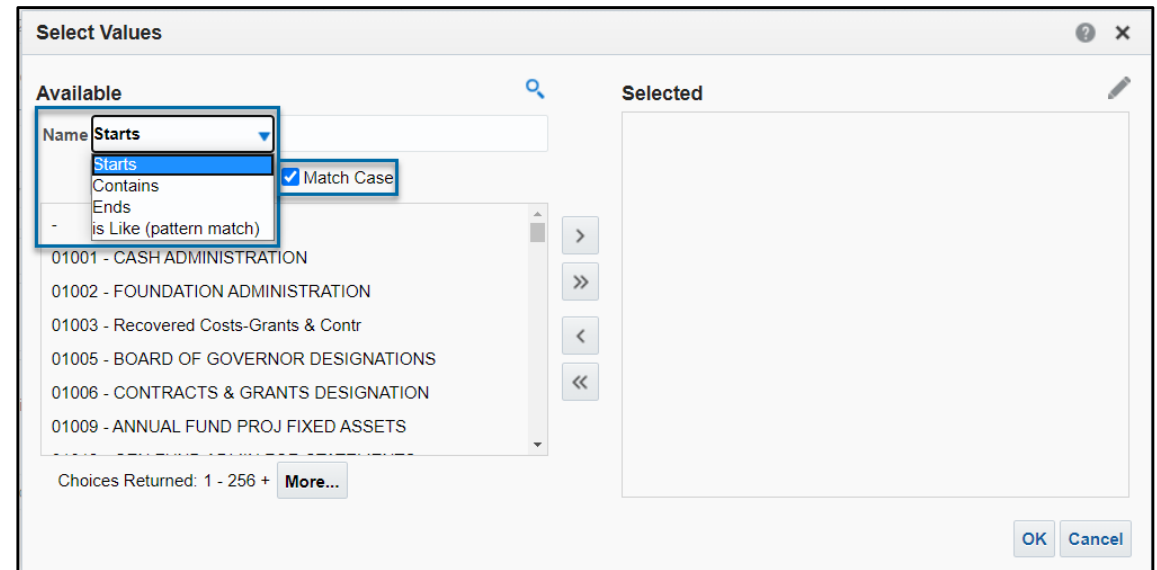
More/Search...

Helpful Hints for Advance Filter Search

How to:

- After hitting “More/Search...” a new box will pop up
- If **Match Case** is checked then you’ll want to pay attention to when a letter is capitalized or not
- By unchecking **Match Case**, you will not have to worry about capitalizing when searching by description
- **Name** can also be changed from **Starts** to **Contains** for different searching needs

Example

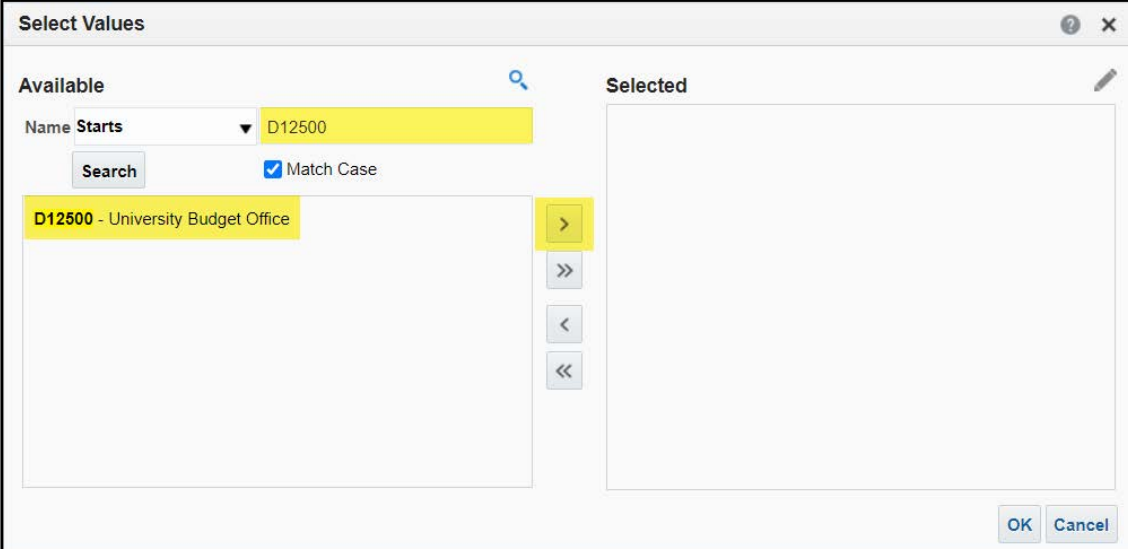


Helpful Hints for Advance Filter Search

How To:

- Enter your DeptID and hit enter
- Select your DeptID from the list that populates
- Hit the arrow button to move your DeptID to the right-side box

Example: "Dept"



The screenshot shows a 'Select Values' dialog box with two main sections: 'Available' and 'Selected'. In the 'Available' section, there is a search bar with 'D12500' entered and a search icon. Below the search bar, a list of items is shown, with 'D12500 - University Budget Office' highlighted in yellow. To the right of this list are four arrow buttons: a single right arrow (>), a double right arrow (>>), a single left arrow (<), and a double left arrow (<<). The 'Selected' section on the right is currently empty. At the bottom right of the dialog, there are 'OK' and 'Cancel' buttons.

Selecting Filters

- These are the basic filters that you'll want to include when running a standard report

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 Reports Cash Fund Balance Performance Report As of Period

Report Filters

1.	2.	3.	4.	Account Category	Budget Ledger	Fund CF Status						
Business Unit	Fiscal Year	As of Period	Account Type	--Select Value--	--Select Value--	--Select Value--						
--Select Value--	2019	11	50 - Revenues;									
5.	6.	7.	8.	Account	Project	Program	Class					
Fund	Dept	Account	Project	Program	Class	NOT Fund	NOT Dept ID	NOT Account	NOT Project	NOT Program	NOT Class	NOT Acct Cat
X	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--
7.	8.	9.	10.	11.	12.	13.	14.					
Dept Tree Name	Dept Level 1	Dept Level 2	Dept Level 3	Dept Level 4	Dept Level 5	FIRMS Object Code						
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--						

Apply Filters Reset Filters

Selecting Filters

1. Business Unit – Select “CHICO – California State Univ, Chico”

- This should already be populated but be sure to double check

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 Reports Cash Fund Balance Performance Report As of Period

Report Filters

1.	2.	3.	4.	Account Category	Budget Ledger	Fund CF Status		
Business Unit	Fiscal Year	As of Period	Account Type	--Select Value--	--Select Value--	--Select Value--		
--Select Value--	2019	11	50 - Revenues;					
5.	6.	Account	Project	Program	Class			
Fund	Dept	--Select Value--	--Select Value--	--Select Value--	--Select Value--			
X	--Select Value--							
NOT Fund	NOT Dept ID	6.	NOT Account	NOT Project	NOT Program	NOT Class		
NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--		
7.	8.	Dept Tree Name	Dept Level 1	Dept Level 2	Dept Level 3	Dept Level 4	Dept Level 5	FIRMS Object Code
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--

Apply Filters Reset Filters

Selecting Filters

2. Fiscal Year – Select “2019” for fiscal year 2019-2020

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 Reports Cash Fund Balance Performance Report As of Period

Report Filters

1.	2.	3.	4.	Account Category	Budget Ledger	Fund CF Status	
Business Unit	Fiscal Year	As of Period	Account Type	--Select Value--	--Select Value--	--Select Value--	
--Select Value--	2019	11	50 - Revenues;				
5.	6.	Account	Project	Program	Class		
Fund	Dept	--Select Value--	--Select Value--	--Select Value--	--Select Value--		
X	--Select Value--						
NOT Fund	NOT Dept ID	NOT Account	NOT Project	NOT Program	NOT Class	8.	
NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT Acct Cat	
						NOT --Select Value--	
7.	Dept Tree Name	Dept Level 1	Dept Level 2	Dept Level 3	Dept Level 4	Dept Level 5	FIRMS Object Code
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--

Apply Filters Reset Filters

Selecting Filters

3. As of Period – Select “12” to view all posted months

- Selecting period 12 is enabling your customization to be a current to date report anytime you run it, you can however choose whichever period you would like to limit the report to.

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 Reports Cash Fund Balance Performance Report As of Period

Report Filters

1.	2.	3.	4.	Account Category	Budget Ledger	Fund CF Status	
Business Unit	Fiscal Year	As of Period	Account Type	--Select Value--	--Select Value--	--Select Value--	
--Select Value--	2019	11	50 - Revenues;				
5.	6.	7.	8.	Account	Project	Program	Class
Fund	Dept	Account	Project	Program	Class		
X	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--		
NOT Fund	NOT Dept ID	NOT Account	NOT Project	NOT Program	NOT Class	NOT Acct Cat	
NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	
7.	8.	9.	10.	11.	12.	13.	
Dept Tree Name	Dept Level 1	Dept Level 2	Dept Level 3	Dept Level 4	Dept Level 5	FIRMS Object Code	
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	

Apply Filters Reset Filters

Selecting Filters

4. Account Type – Select “50 – Revenues and 60 - Expenditures”

➤ These should already be populated but be sure to double check

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 Reports Cash Fund Balance Performance Report As of Period

Report Filters

1.	2.	3.	4.	Account Category	Budget Ledger	Fund CF Status
Business Unit	Fiscal Year	As of Period	Account Type	--Select Value--	--Select Value--	--Select Value--
--Select Value--	2019	11	50 - Revenues;			
5.	6.					
Fund	Dept	Account	Project	Program	Class	
X	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	
NOT Fund	NOT Dept ID	NOT Account	NOT Project	NOT Program	NOT Class	8.
NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT Acct Cat
						NOT --Select Value--
7.						
Dept Tree Name	Dept Level 1	Dept Level 2	Dept Level 3	Dept Level 4	Dept Level 5	FIRMS Object Code
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--

Apply Filters Reset Filters

Selecting Filters

5. Fund – There is an X that always populates here, make sure that X is unchecked to view all funds; or select More/Search for a specific fund

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 Reports Cash Fund Balance Performance Report As of Period

Report Filters

1.	2.	3.	4.	Account Category	Budget Ledger	Fund CF Status	
Business Unit	Fiscal Year	As of Period	Account Type	--Select Value--	--Select Value--	--Select Value--	
--Select Value--	2019	11	50 - Revenues;				
5.	6.	Account	Project	Program	Class		
Fund	Dept	--Select Value--	--Select Value--	--Select Value--	--Select Value--		
X	--Select Value--						
NOT Fund	NOT Dept ID	NOT Account	NOT Project	NOT Program	NOT Class	8.	
NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT Acct Cat	
						NOT --Select Value--	
7.	Dept Tree Name	Dept Level 1	Dept Level 2	Dept Level 3	Dept Level 4	Dept Level 5	FIRMS Object Code
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--

Apply Filters Reset Filters

Selecting Filters

6. Dept – Recommended to click “More/Search...” to find Dept ID
 - Or you can use the Dept Level filters to select a range of Dept IDs by level

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 Reports Cash Fund Balance Performance Report As of Period

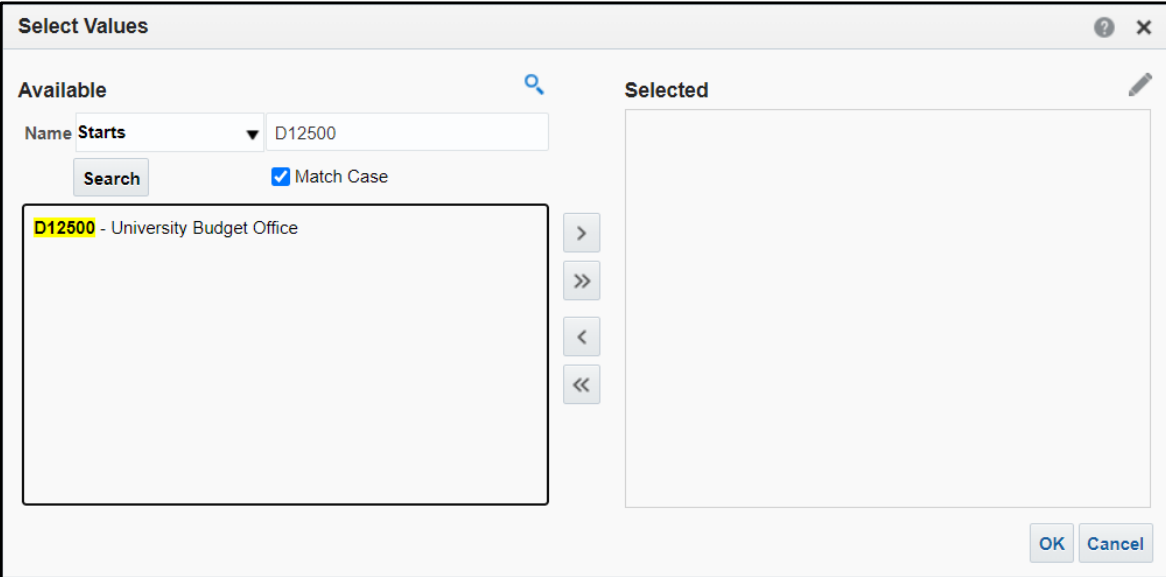
Report Filters

1. Business Unit --Select Value--	2. Fiscal Year 2019	3. As of Period 11	4. Account Type 50 - Revenues;	Account Category --Select Value--	Budget Ledger --Select Value--	Fund CF Status --Select Value--
5. Fund X	Dept --Select Value--	Account --Select Value--	Project --Select Value--	Program --Select Value--	Class --Select Value--	
NOT Fund NOT --Select Value--	NOT Dept ID NOT --Select Value--	6. NOT Account NOT --Select Value--	NOT Project NOT --Select Value--	NOT Program NOT --Select Value--	NOT Class NOT --Select Value--	8. NOT Acct Cat NOT --Select Value--
7. Dept Tree Name --Select Value--	Dept Level 1 --Select Value--	Dept Level 2 --Select Value--	Dept Level 3 --Select Value--	Dept Level 4 --Select Value--	Dept Level 5 --Select Value--	FIRMS Object Code --Select Value--

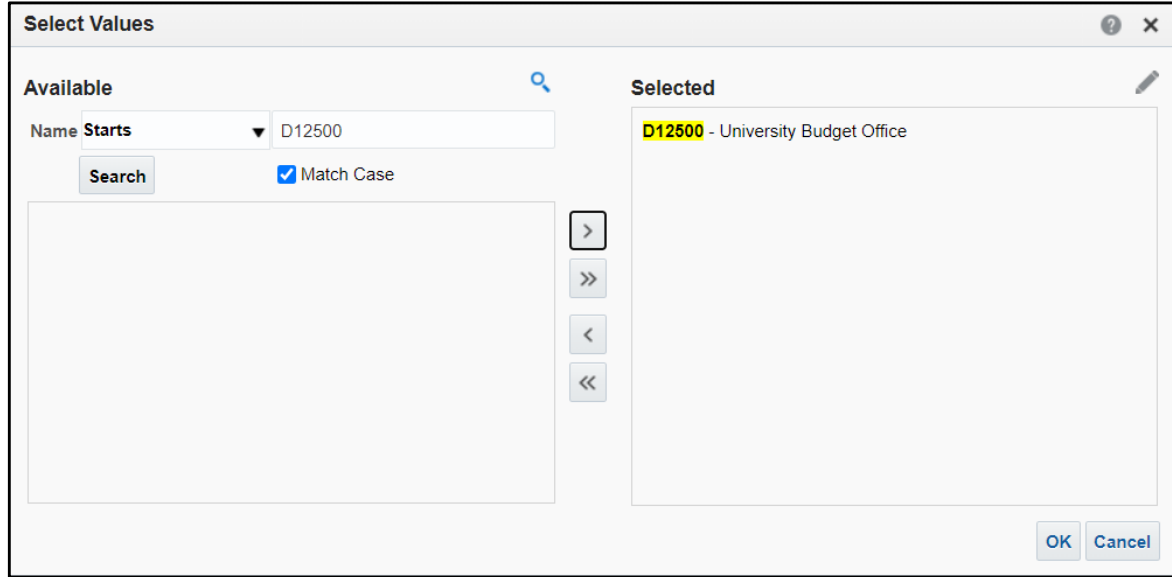
Apply Filters Reset Filters

Selecting Filters

6. Dept – Type in your DeptIDs; once the DeptID populates the left box be sure to move over to the right box and click ok



The screenshot shows a dialog box titled "Select Values". It has two main sections: "Available" and "Selected". In the "Available" section, there is a search bar with "Name Starts" selected and "D12500" entered. Below the search bar is a "Search" button and a checked "Match Case" checkbox. The "Available" list contains one item: "D12500 - University Budget Office". In the "Selected" section, the list is empty. Between the two lists are four arrow buttons: a single right arrow (>), a double right arrow (>>), a single left arrow (<), and a double left arrow (<<). At the bottom right are "OK" and "Cancel" buttons.



The screenshot shows the same "Select Values" dialog box, but now the "Available" list is empty and the "Selected" list contains the item "D12500 - University Budget Office". The search criteria remain "Name Starts" and "D12500". The arrow buttons and "OK/Cancel" buttons are still present.

Selecting Filters

7. Dept Tree Name – Select “CHI_RPTG_SECURITY”

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 Reports Cash Fund Balance Performance Report As of Period

Report Filters

1.	2.	3.	4.	Account Category	Budget Ledger	Fund CF Status
Business Unit	Fiscal Year	As of Period	Account Type	--Select Value--	--Select Value--	--Select Value--
--Select Value--	2019	11	50 - Revenues;			
5.	6.					
Fund	Dept	Account	Project	Program	Class	
X	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	
NOT Fund	NOT Dept ID	NOT Account	NOT Project	NOT Program	NOT Class	8.
NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT Acct Cat
						NOT --Select Value--
7.						
Dept Tree Name	Dept Level 1	Dept Level 2	Dept Level 3	Dept Level 4	Dept Level 5	FIRMS Object Code
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--

Apply Filters Reset Filters

Selecting Filters

8. NOT Acct Cat – Select “603” to not view Benefits

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 Reports Cash Fund Balance Performance Report As of Period

Report Filters

1.	2.	3.	4.	Account Category	Budget Ledger	Fund CF Status	
Business Unit	Fiscal Year	As of Period	Account Type	--Select Value--	--Select Value--	--Select Value--	
--Select Value--	2019	11	50 - Revenues;				
5.	6.	Account	Project	Program	Class		
Fund	Dept	--Select Value--	--Select Value--	--Select Value--	--Select Value--		
X	--Select Value--						
NOT Fund	NOT Dept ID	NOT Account	NOT Project	NOT Program	NOT Class	8.	
NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT --Select Value--	NOT Acct Cat	
						NOT --Select Value--	
7.	Dept Tree Name	Dept Level 1	Dept Level 2	Dept Level 3	Dept Level 4	Dept Level 5	FIRMS Object Code
--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--

Apply Filters Reset Filters

Changing Column Headers

Show Column 1: Fund Fdescr	Column 2: Dept Fdescr	Column 3: Prog Fdescr	Column 4: Account Fdescr	Column 5: Hide	Column 6: Hide	OK		
Select Report View: Summarized								
Fund Fdescr ▲▼	Dept Fdescr ▲▼	Prog Fdescr	Account Fdescr	Current Budget	Actuals	Encumbrances	Balance Available	% Used Fiscal Year

- The most likely scenario where the header columns need to be changed is when a unit is wanting to view program codes
- The column headers default to most departments' basic needs, but they can be changed to show the information in different way

Changing Column Headers

- Click on the drop-down arrow
- Select from the list
- Click OK

Column 3: Account Fdescr Column 4: Hide Column 5: Hide Column 6: Hide

Select Report View: Summarized

Account Fdescr	Actuals	Encumbrances	Balance Available	% Used Fiscal Year
601201 - Management And Supervisory	3,181.22	0.00	42,446.78	82%
601300 - Support Staff Salaries	8,430.00	0.00	33,686.00	83%
601D01 - Electronic Devices - MPP	795.00	0.00	0.00	100%
601S05 - CSEA Salary Stipend	4,215.00	0.00	1,686.00	71%
604090 - Other Communications	8.00	0.00	(8.00)	
606001 - Travel-In State	1,392.18	0.00	3,507.82	28%
606002 - Travel-Out Of State	0.00	0.00	0.00	
616N01 - NonCap IT Hardware	1,426.89	0.00	73.11	95%
616S02 - Software Maintenance Agrmts	9,500.00	0.00	0.00	100%

Show Column 1: Fund Fdescr Column 2: Dept Fdescr Column 3: Account Fdescr Column 4: Hide

Select Report View: Summarized

Fund Fdescr	Dept Fdescr	Account Fdescr	Current Budget	Actuals
G1006 - CSU OPERATING FUND	D12500 - University Budget Office	60120	230,628.00	188,000.00
		60130	202,116.00	168,000.00
		601D0	795.00	795.00
		601S0	5,901.00	4,215.00
		60409		
		60600	4,900.00	1,392.18
		60600	0.00	0.00
		616N0	1,500.00	1,426.89
		616S0	39,500.00	39,500.00

Subtotaling Columns

- If you're sticking to the default column headers the report should be displaying the desired totals
- If you add program code, you'll want to adjust what columns are totaling and which are not

Subtotaling Columns

How To:

- Right click on the header you want to subtotal
- Select Show Subtotal
- Select After Values

Additional Note:

- You can also remove a column's subtotaling by selecting "None"

Example

Account Fdescr	Current Budget	Actuals	Encu
601201 - Managem	100	188,181.22	
601300 - Support Sta	100	168,430.00	
601D01 - Electronic	100	795.00	
601S05 - CSEA Sala			
604090 - Other Com			
606001 - Travel-In S			
606002 - Travel-Out			
616N01 - NonCap IT			
616S02 - Software M			
660001 - Postage Ar	100	2.50	
660002 - Printing		306.00	

The screenshot shows a context menu for the 'Account Fdescr' column header. The menu options are: Sort Column, Keep Only, Remove, Show Subtotal, Show Row level Grand Total, Show Column level Grand Total, Exclude column, Include column, and Move Column. The 'Show Subtotal' option is highlighted, and a sub-menu is open showing: None, After Values, Before Values, At the Beginning, and At the End. The 'After Values' option is selected in the sub-menu.

Saving Customization

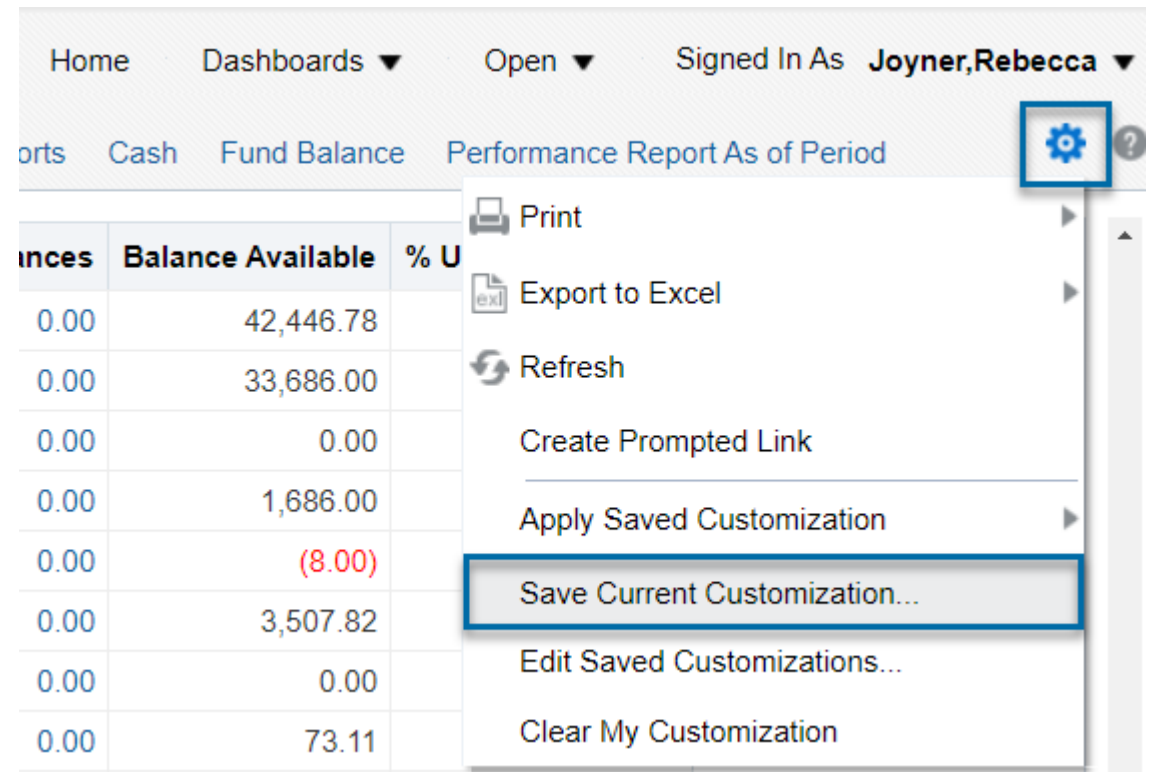
Why

- This saves times and allows for you to not have to reset your filters every time you want to run the same report

How To:

- Click on the settings wheel on the top right corner of the screen
- Select Save Current Customization

Example



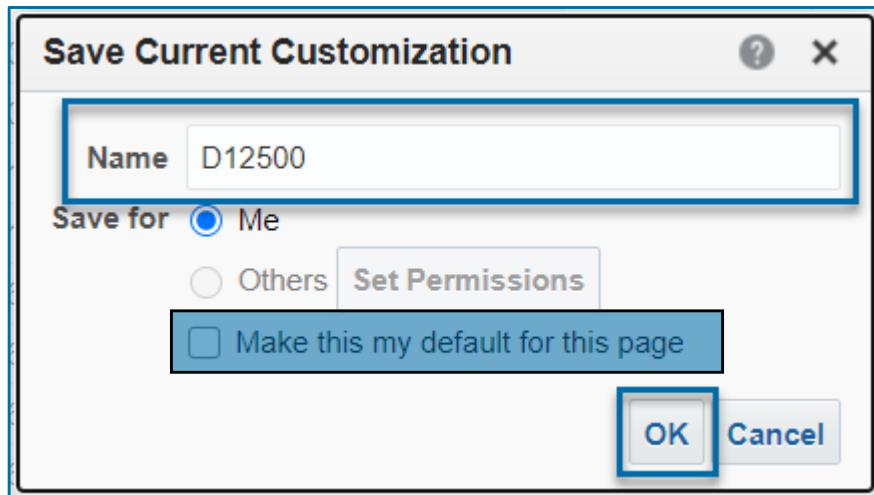
The screenshot shows a web application interface. At the top, there are navigation links: Home, Dashboards (with a dropdown arrow), Open (with a dropdown arrow), and Signed In As Joyner, Rebecca (with a dropdown arrow). Below this, there are report filters: Reports, Cash, Fund Balance, and Performance Report As of Period. A settings gear icon is highlighted with a blue box in the top right corner. A dropdown menu is open from this gear, showing options: Print, Export to Excel, Refresh, Create Prompted Link, Apply Saved Customization (with a right-pointing arrow), Save Current Customization... (highlighted with a blue box), Edit Saved Customizations..., and Clear My Customization. Below the menu, a table is visible with columns: Incomes, Balance Available, and % U. The table contains several rows of data, including values like 0.00, 42,446.78, 33,686.00, 0.00, 1,686.00, (8.00), 3,507.82, 0.00, and 73.11.

Incomes	Balance Available	% U
0.00	42,446.78	
0.00	33,686.00	
0.00	0.00	
0.00	1,686.00	
0.00	(8.00)	
0.00	3,507.82	
0.00	0.00	
0.00	73.11	

Saving Customization

How To: Save Customization

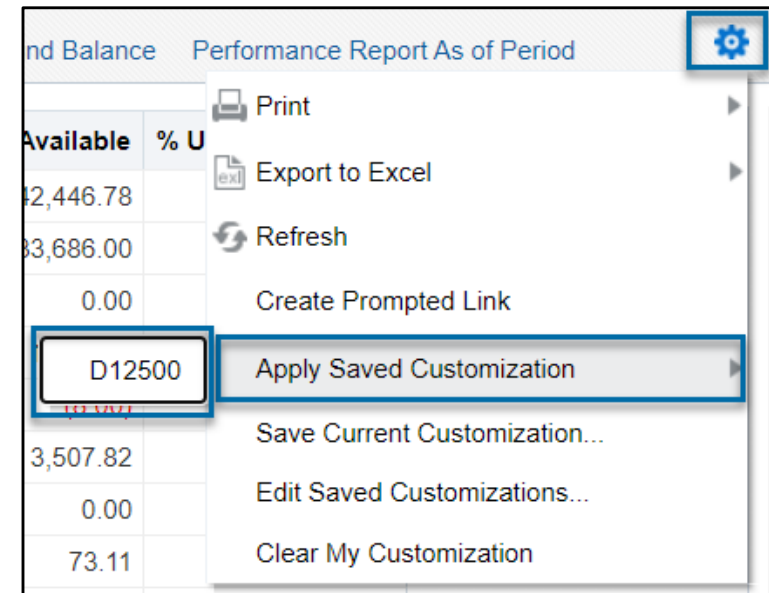
- Name you customization
 - Hit OK
- If you check the **make this my default for this page**, then this report will automatically run when you click into the **Manage My Budget** tab



The screenshot shows a dialog box titled "Save Current Customization". It has a text input field for "Name" containing "D12500". Below it, there are radio buttons for "Save for" with "Me" selected. There is a "Set Permissions" button and a checkbox for "Make this my default for this page" which is currently unchecked. At the bottom right, there are "OK" and "Cancel" buttons.

How To: Apply Customization

- Using the same setting wheel, you can now apply your saved customization

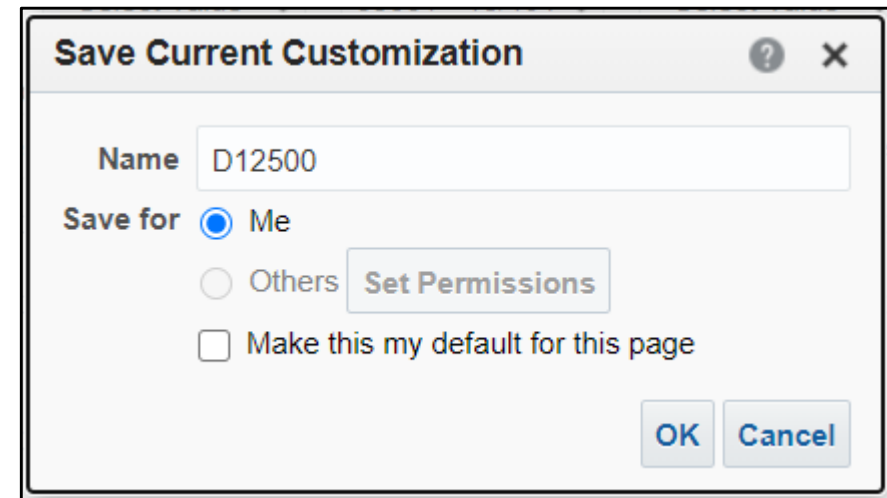


The screenshot shows a report interface with a settings menu open. The menu is located in the top right corner, indicated by a gear icon. The menu items are: Print, Export to Excel, Refresh, Create Prompted Link, D12500 (highlighted), Apply Saved Customization (highlighted), Save Current Customization..., Edit Saved Customizations..., and Clear My Customization. The background shows a table with columns "Available" and "% U" and various numerical values.

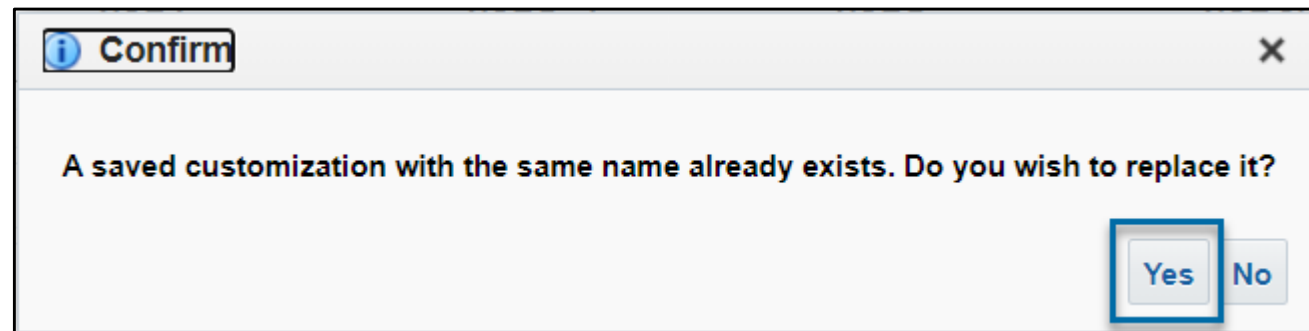
Update a Saved Customization

How To:

- First apply your saved customization by clicking on the setting wheel and selecting “Apply Saved Customization”
- Apply the adjustments to your filters or column headers that you wish to update
- Go through the same steps as before to save a customization
- Use the **exact same name** you used on your previous customization and replace the previous copy



The screenshot shows a dialog box titled "Save Current Customization". It has a search icon and a close icon in the top right corner. The "Name" field contains "D12500". The "Save for" section has three options: "Me" (selected with a blue radio button), "Others" (with an unselected radio button), and "Make this my default for this page" (with an unselected checkbox). A "Set Permissions" button is located next to the "Others" option. At the bottom right, there are "OK" and "Cancel" buttons.



The screenshot shows a dialog box titled "Confirm" with an information icon and a close icon in the top left corner. The main text reads: "A saved customization with the same name already exists. Do you wish to replace it?". At the bottom right, there are "Yes" and "No" buttons, with the "Yes" button highlighted by a blue border.

Thank You

Please email budgetcfs@csuchico.edu to
schedule a one-on-one training