

Finance Data Transition

Enterprise Data Transformation Project – Finance Data Transition

Overview

Cal Poly Humboldt has embarked on a five-year initiative called the **Enterprise Data Transformation (EDT) Project**, designed to modernize our data architecture and foster a data-informed decision-making culture.

The primary objective of this transformation is to implement a **comprehensive, reliable, and scalable enterprise data solution** that supports **equitable and inclusive student success**.

As part of this effort, we will be **transitioning from Oracle Business Intelligence (OBI) to the Chancellor's Office-supported Common Financial System (CFS) Data Warehouse**. To ensure a smooth transition and assess potential impacts, a **CFS Data Warehouse Task Force**, composed of campus-wide stakeholders, will guide this effort.

Over the next year, the task force will focus on:

- Creating resources and providing training
- Supporting campus-wide adoption of the CFS Data Warehouse

Stay tuned for additional campus announcements. **Thank you to the CFS Transition Task Force for leading this important work!**

CFS Transition Task Force Members:

- Brigid Wall - University Budget Office
- Carla Wharton - University Budget Office
- Cynthia Hawking - Accounting
- Anne Taylor - University Budget Office
- Gabriel Munoz - University Budget Office
- Jessica Lende - Athletics
- Kelly Dickey - Accounting
- Kevin Furtado - University Advancement
- Krista Carroll - College of Professional Studies
- Melanie Bettenhausen - Enrollment Management

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- Pat Comella - Facilities Management
- Patrick Orona - Academic Affairs
- Rachael Gipson - Information Technology Services
- Sarah Long - Financial Services
- Sam Puentes - Accounting
- Steven Margell - Institutional Research, Analytics, and Reporting

Sponsors:

Sarah Long, Associate Vice President of Financial Operations & University Controller

Michael Le, Acting Chief Data Officer; Director, ITS Institutional Research, Analytics, and Reporting

Patrick Orona, Director of Academic Resources, Office of Academic Affairs

FAQs

What is happening?	We are transitioning Oracle Business Intelligence (OBI) Finance and Labor Cost users to the CSU CFS Data Warehouse (also referred to as the Finance Data Warehouse) to support the ITS Enterprise Data Transformation (EDT) project
Why is this happening?	The current technology stack is demanding more resources than we have to develop it, let alone maintain it
Who does this impact?	Those that use OBI, our current campus reporting solution
What is the CFS Data Warehouse?	The CFS Data Warehouse contains financial reporting capabilities that provide campuses with a set of interactive dashboards containing common, core reporting capabilities required by campuses and the Chancellor's Office
Who is funding CFS Data Warehouse?	The Chancellor's Office
Do other campuses use it?	Most CSU campuses use it
Will it have all the same OBI reports I currently use?	Not exactly. It holds the same financial information but is

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	accessed through different dashboards and layouts. Users can often replicate OBI reports by setting up their own customizations.
What information does it have?	• Financial Reporting (most common) • Transaction Inquiry (most common) • Labor Cost Distribution (LCD) • Tree Reporting • FIRMS/GAAP • Sponsored Programs • Asset Management (AM)
What about other non-financial information currently accessed through OBI like DARS, faculty contracts, instructor workload, etc.?	We will be reaching out to other campuses to understand the solutions they use as well as assessing existing resources that we can potentially leverage. Users will still be able to access non finance information in OBI
When will I lose access to finance data within OBI?	We will begin sun setting finance data in OBI at the end of the transition period. See timeline below.
What is the transition timeline?	See timeline below. Please note divisional timelines may be more detailed with specific milestones
Where can I find additional information and resources?	• Cal Poly Humboldt Resource Website

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Timeline

