

Cal State Fullerton

TitanInsights Finance

Accessing Reports and Using Features

Presented by IT Training & Support



Agenda

TitanInsights: Accessing Reports and Using Features

- Training & Support Resources
- Terminology
- What is TitanInsights?
- How to log in to TitanInsights
- Demonstration
 - Accessing report dashboards
 - Marking dashboards as Favorites
 - TitanInsights Features
 - Filters
 - Chart & Table Options
 - Bookmarks
 - Exporting Data
 - Share report with others
- Q&A

Training & Support Resources

IT Training & Support

ITtraining@fullerton.edu

657-278-5647

IT Training website

- Questions about how to access and use TitanInsights (i.e., content covered by user guides)

ERP Data Warehouse Team

TitanInsights@fullerton.edu

- Questions about report dashboards, data, or other inquiries.

IT Help Desk

HelpDesk@fullerton.edu

657-278-7777

- Technical issues with TitanInsights

TitanInsights
user guides

click
here →

Shared folders

Name



User Guide

Terminology

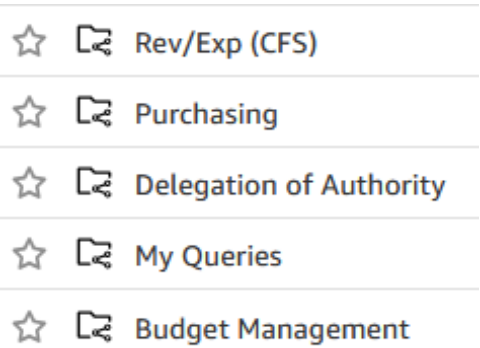
Data Warehouse

- A data warehouse is an online repository for information. The CSUF Data Warehouse combines data from several different campus databases in one location and allows end users to view, filter, and search the information.



Dashboard (or Report Dashboard)

- A Dashboard is a grouping of data warehouse information based on specific criteria. Dashboards are created by the campus for specific needs, such as the Rev/Exp Dashboard, which allows users to view summary and detail information on budget, revenue, and expense transactions for their department(s).



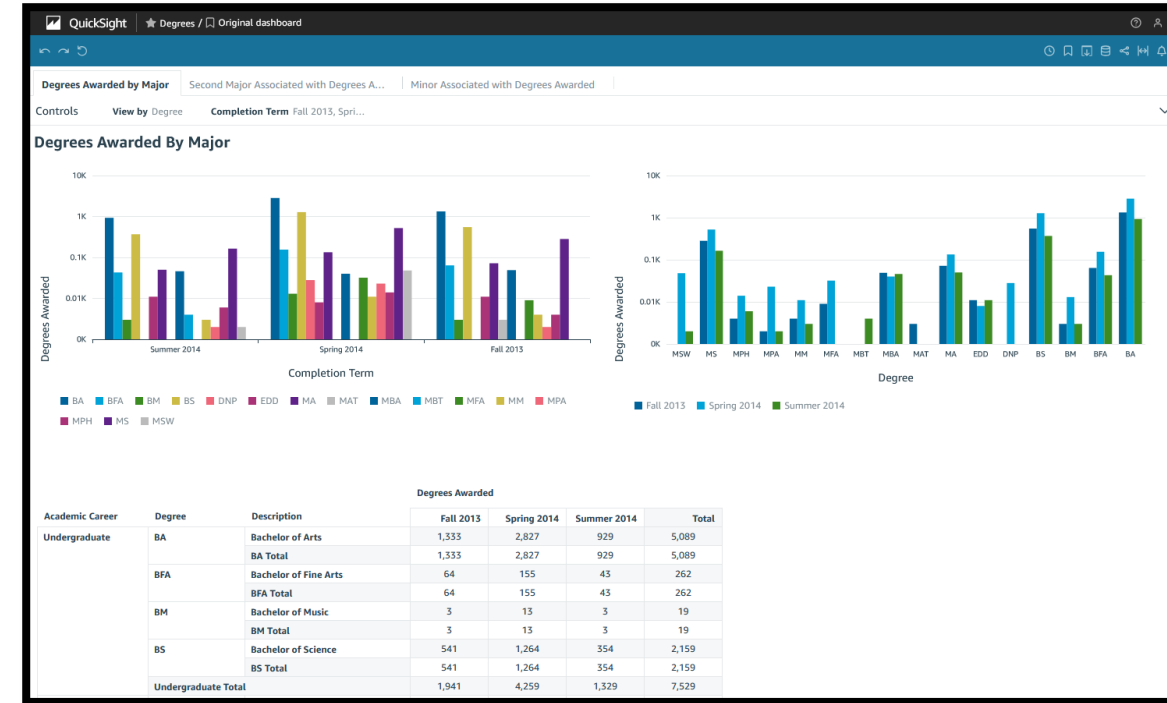
Report (or Tab)

- These are the actual reports that users interact with by filtering, sorting, and exporting data. For example, the Revenue/Expense Summary report allows users to view summary totals of all of their department budget, revenue, and expense transactions by fiscal year.



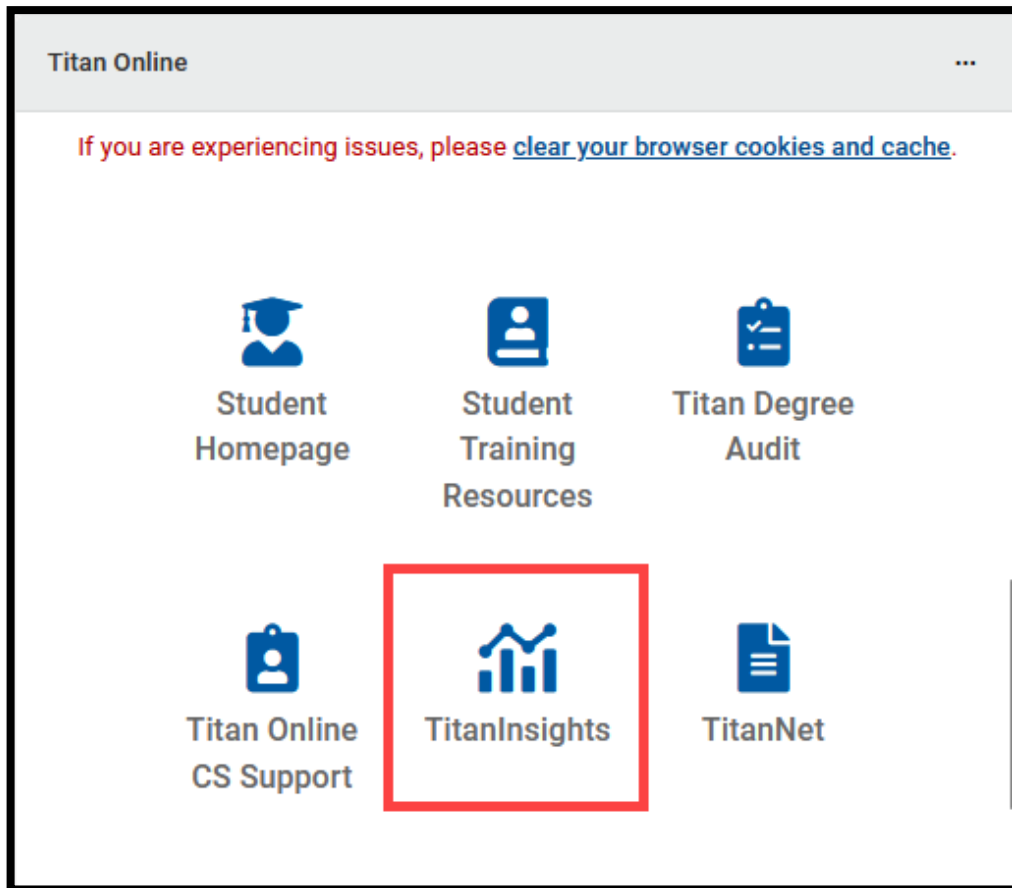
What is TitanInsights?

- Modernization of our campus data warehouse, now powered by advanced cloud technology!
 - Cloud-agnostic solution, which means the campus is not dependent on a specific app/platform in the long-term
 - Currently using Amazon Web Services (AWS) QuickSight platform
 - Serves as centralized, easily accessible repository for a diverse range of campus data
 - Faster, more efficient reporting and analysis capabilities
 - Improved system stability and reliability
- Replacement for OBIEE Data Warehouse, but OBIEE will be available until the end of 2025
- Dashboards availability
 - All report types (Student, HR, Finance) are now available in TitanInsights and OBIEE
 - Users with existing OBIEE access should have access in TitanInsights. New users will need to submit the relevant Access Request Form (Campus Solutions, HR, Finance) to get access.
- Recommended browser for TitanInsights is Google Chrome

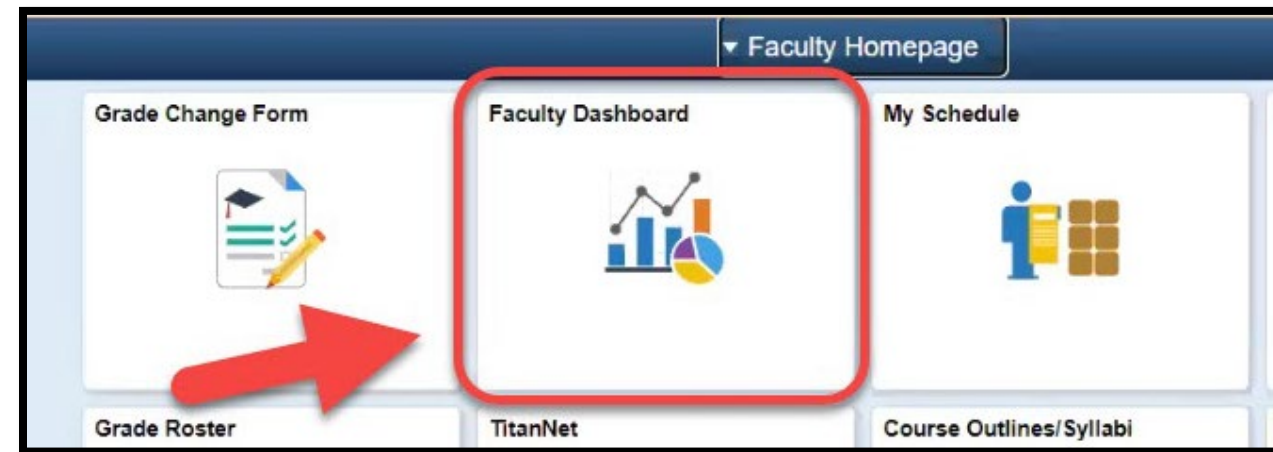


How to log in to TitanInsights

- TitanInsights icon in Titan Online on campus portal



- Faculty Dashboard (FSSD) link on Faculty Homepage now redirects to TitanInsights



Demonstration



Question & Answer

