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**CSU**

**The California State University**  
OFFICE OF THE CHANCELLOR

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# Enterprise Systems Applications Guide

Information and Application Services  
Enterprise Systems Group  
May 2009

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### **Introduction**

The Enterprise Systems group is responsible for the design, development, implementation and maintenance of software applications for corporate information management, reporting and analysis purposes. This document is intended to provide a brief description of the applications so that the Chancellor's Office and campus users/providers of corporate information will know what informational resources are currently available. In addition to describing the applications and their purposes, the document identifies the Chancellor's Office division data stewards who are responsible for the management of the data, for whom and why the data are prepared, and when information is needed for processing and reporting. For additional information regarding the applications in this resource guide, please send inquires to: [es\\_mgr@calstate.edu](mailto:es_mgr@calstate.edu).

### **Academic Calendar Database**

The CSU Academic Calendar Database is a web-enabled application that automates the submission of calendar data to the Chancellor's Office for enrollment planning, academic events, and payrolls. A proposed set of dates for calendar events has been preloaded, so that campus staff can make modifications to a draft set of dates rather than entering a complete set of new events and dates.

### **Data Steward**

- Academic Programs
- Analytic Studies
- Systemwide Human Resources

### **Information Requestors**

- Academic Event  
Campuses that use CSU minima for instructional days and examinations will be in compliance with Federal Title IV financial aid regulations
- Enrollment Planning  
Automates the submit of calendar data to the Chancellor's Office for enrollment planning
- Payroll Calendar  
Pursuant to Title 5, Section 42800, established for internal CSU purposes

### **Data Requested**

- Academic Event  
Campuses validate their registration dates
- Enrollment Planning  
Campuses identifies when classes begin; which start the census date for enrollment reporting
- Payroll Calendar  
The payroll calendar is programmed into the state payroll system by the State Controller's

### **Submission Schedule**

- Data should be submitted by April 28<sup>th</sup>



**Academic Planning Database (APDB)**

APDB provides information, as of census date, on all persons who are compensated from instructional budget accounts and persons having teaching responsibilities in the CSU regardless of funding sources. In addition, APDB contains information on each class section that is offered and the resources used to teach these courses each term.

**Data Steward**

- Analytic Studies

**Information Requestors**

- Federal and State Agencies
- Chancellor's Office Executive and Management Staff
- Integrated Postsecondary Education Data System

**Data Requested**

- Annual studies of facility utilization
- Support requests for new facilities or major changes using capital outlay funds
- Faculty workload analyses
- Integrated Postsecondary Education Data System (IPEDS) Fall Enrollment Survey

**Submission Schedule**

- Error free final summer term is due thirty days (30) after the fall census date
- Error free fall profile file is due thirty days (30) after the fall census date
- Error free winter profile file is due thirty days (30) after the winter census date
- Error free spring profile file is due thirty days (30) after the spring census date
- Error free fall/winter/spring final file is due on June 21<sup>st</sup>

**Accounting Tables**

The data files for the accounting tables are from the State Controller's Office (SCO). These files are loaded to Oracle tables on a monthly basis for the Chancellor's Office accounting department for reconciliation purposes.

**Data Steward**

- Financial Management Services (FMS)

**Information Requestors**

- Chancellor's Office

**Data Requested**

- Not applicable

**Submission Schedule**

- The files are received and loaded by the second week of each month

### **Cash Management Operations**

The Cash Management Operations (CMO) System is intended to provide timely information to campuses concerning cash positions subsequent to the transfer of responsibility for student fees from the State General Fund to the California State University. Average daily balances are calculated based on external transaction data provided by banks, investment firms, and the State Controller's Office and internal transaction data resulting from Cash Posting Order (CPO) management processes. The system implements a new business process in that maintenance and return to campuses of average daily balance data was not a requirement prior to the transfer of responsibility for student fees to the CSU.

At its inception in April 2007, the CMO system was intended to serve primarily as a collection and display system for external account data and verified CPOs. As of September 2007, the objectives of the CMO system were expanded to include automation of the Chancellor's Office internal CPO generation, review, and approval process. The existing manual process will be replaced to provide improved quality control on CPO requests from Chancellor's Office departments.

### **Data Steward**

- Finance and Treasury – Cash Management

### **Information Requestors**

- Chancellor's Office
- CSU Campuses

### **Data Requested**

- Average daily balances maintained with banks and investment managers

### **Submission Schedule**

- Average daily account balances are updated for campus use on a monthly basis based on data posted daily from investment resources and fund distributions

**Common/COSAR Table System**

The Common/COSAR Table System supports the systemwide classification tables. These tables are used as reference tables to provide descriptions of the numeric codes used for the data elements in various databases.

**Data Steward**

- Analytic Studies
- Capital Planning and Capital Planning Design and Construction
- Enterprise Systems Group
- Systemwide Financial Operations

**Information Requestors**

- Chancellor's Office
- CSU Campuses

**Data Requested**

- Not applicable

**Submission Schedule**

- Data are updated on an as needed basis

**Community Service Learning**

Community Service Learning is a planning and progress review system for community service activities funded by grants and state funds on campus. The information is used for management and reporting purposes.

**Data Steward**

- Community Service Learning

**Information Requestors**

- CSU Board of Trustees
- State Legislature

**Data Requested**

- Program plans, goals, and objectives
- Program success measures
- Campus Service Learning Budgets and expenditures

**Submission Schedule**

- Data are submitted annually by campuses approximately June of each year

### **Contracts System**

The Contracts System is an online web-enabled application that allows Chancellor's Office Contract Services & Procurement Office to maintain and display to campus users a comprehensive, searchable database of systemwide agreements. Depending on the nature of the agreement, access to agreement details may be restricted to CSU campus users.

### **Data Steward**

- Contract Services & Procurement

### **Information Requestors**

- Chancellor's Office
- CSU Campuses
- Public

### **Data Requested**

- Agreement summaries
- Contract documents and attachments
- General and contract-specific vendor information

### **Submission Schedule**

- Data are updated on an as needed basis; display to users is dynamic and controlled by the Data Steward

**CO Personnel**

The CO Personnel system contains a PIMS record for each Chancellor's Office employee who is paid from state funds. Chancellor's Office employee information, from this database, is sent to the from the State Controller's Office in Sacramento. The file loaded and a report is generated for Human Resources Payroll which lists employee changes for a given month.

**Data Steward**

- Human Resources

**Information Requestors**

- Chancellor's Office

**Data Requested**

- PIMS Monthly Update Report

**Submission Schedule**

- The file from SCO is received and loaded by the second week of each month

**Custodial Database**

Custodial space and farm acreage are inventoried in the Space and Facilities Database and are updated annually in this database to reflect the changes in the state maintained space for each CSU campus. The changes in the state maintained space directly affect the campus state support budget.

**Data Steward**

- Capital Planning Design and Construction

**Information Requestors**

- Chancellor's Office Budget Office
- Chancellor's Office CPDC Office

**Data Requested**

- Custodial Report

**Submission Schedule**

- Data (4-1 Custodial and Farm Space Campus Worksheet and the 4-2 Facility Information Sheet) should be submitted from May 1<sup>st</sup> through May 31<sup>st</sup>



### **Employee Salary Projection System (ESP)**

The Employee Salary Projection system is used to estimate increases in compensation and benefit costs for CSU state support budget development and collective bargaining unit purposes. Monthly input to ESP are from the campuses and the State Controller's Office (Payscale, Payment and Employee History files) which includes data elements such as: gross salaries, employer paid benefits, health and dental party rate codes, employee collective bargaining unit identification (CBID), employee time base, class code, FIRMS state agency, CSU fund, program codes, and numerous other data elements.

### **Data Steward**

- CSU System Budget Office

### **Information Requestors**

- California State Offices and Legislature (e.g., California Department of Finance, Legislative Analyst Office, Legislative Assembly and Senate Committees, and the Bureau of State Audit)
- Chancellor's Office Executive and Management Staff
- Collective Bargaining Units
- CSU Campuses
- Systemwide Human Resources/Labor Relations Office
- Internal uses for Budget Development

### **Data Requested**

- The data are used to annually calculate CSU state support compensation and benefit costs for budget development and by CSU collective bargaining unit in support CSU Labor Relations (for represented groups) and the Chancellor's Office (for non-represented groups). For example, ESP data are used to identify full-year CSU state support salary data by collective bargaining identification (CBID) for the purpose of distributing compensation increases. Further, the ESP data are used to calculate the cost of CSU state support benefit increases, such as health, dental, life insurance, vision, and long-term disability by collective bargaining unit. ESP is also used for numerous ad hoc reports and analyses on CSU staffing and compensation for internal and external constituency groups.

### **Submission Schedule**

- Data should be submitted by the 15<sup>th</sup> of each month

### **Enrollment Reporting System Applicants (ERSA)**

The ERSA database provides information, as of census date, on each applicant during the college year whether or not the applicant enrolled. ERSA provides the basis for comprehensive analysis of applications and admissions and their relation to CSU enrollment. Information from this database can be used to provide performance reports to feeder schools and colleges, and is a source of data relating to proposed changes in admissions criteria.

### **Data Steward**

- Analytic Studies

### **Information Requestors**

- Chancellor's Office Executives and Management Staff
- CSU Campus Presidents and Management Staff
- CSU Board of Trustees
- California Legislature
- California Department of Finance
- California Legislative Analyst's Office
- California Post-Secondary Education Commission (CPEC)
- Integrated Postsecondary Education Data System (IPEDS)
- Other Colleges and Universities

### **Data Requested**

- Integrated Postsecondary Education Data System (IPEDS) – Institutional Characteristics Survey
- CSU Statistical Abstract
- Statistical Reports
- Ad-hoc Reports

### **Submission Schedule**

- Error free final summer term is due three weeks after the fall census date
- Error free fall profile file is due three weeks after the fall census date
- Error free winter profile file is due three weeks after the winter census date
- Error free spring profile file is due three weeks after the spring census date
- Error free fall/winter/spring final file is due on June 21<sup>st</sup>

NOTE: Final file may include special session admissions that took place after census date.

### **Enrollment Reporting System Degree (ERSD)**

The ERSD database provides information on each degree awarded to all students by any of the CSU campuses during a single college year. Information can be obtained on degree recipients on the basis of sex, ethnicity and age.

### **Data Steward**

- Analytic Studies

### **Information Requestors**

- Chancellor's Office Executives and Management Staff
- CSU Campus Presidents and Management Staff
- CSU Board of Trustees
- California Legislature
- California Department of Finance
- California Legislative Analyst's Office
- California Post-Secondary Education Commission (CPEC)
- Integrated Postsecondary Education Data System (IPEDS)
- Other Colleges and Universities
- Consortium for Student Retention Data Exchange (CSRDE)

### **Data Requested**

- Integrated Postsecondary Education Data System (IPEDS) – Graduation Rate Survey, Completions
- CSU Statistical Abstract
- Statistical Reports
- Ad Hoc Reports

### **Submission Schedule**

- Data should be submitted by August 15<sup>th</sup> fall for winter, and spring degrees
- Data should be submitted by November 5<sup>th</sup> for summer degrees

### **Enrollment Reporting System Off-Campus (ERSO)**

The ERSO database provides information on all units taken at designated off-campus centers of the CSU. Units attempted at the off-campus centers are included in both the Off-Campus Enrollment file and the ERS Student file. Data are extracted from the ERSS file to create the ERSO Master file as of census date.

### **Data Steward**

- Analytic Studies

### **Information Requestors**

- Chancellor's Office Executives and Management Staff
- CSU Campus Presidents and Management Staff
- CSU Board of Trustees
- California Legislature
- California Department of Finance
- California Legislative Analyst's Office
- California Post-Secondary Education Commission (CPEC)
- Integrated Postsecondary Education Data System (IPEDS)
- Other Colleges and Universities

### **Data Requested**

- CSU Statistical Abstract
- Statistical Reports
- Ad-Hoc Reports

### **Submission Schedule**

- Error free final summer term is due three weeks after the fall census date
- Error free fall profile file is due three weeks after the fall census date
- Error free winter profile file is due three weeks after the winter census date
- Error free spring profile file is due three weeks after the spring census date
- Error free fall/winter/spring final file is due on June 21<sup>st</sup>

NOTE: Final file may include special session admissions that took place after census date.

### **Enrollment Reporting System Student (ERSS)**

The ERSS database provides enrollment data for each enrolled student each term of the college year. This information is used to support state budget requests, respond to federal information request and to support research requirements. Information from this database can be obtained by ethnicity, major, citizenship, residence, gender and age.

### **Data Steward**

- Analytic Studies

### **Information Requestors**

- Chancellor's Office Executives and Management Staff
- CSU Campus Presidents and Management Staff
- CSU Board of Trustees
- California Legislature
- California Department of Finance
- California Legislative Analyst's Office
- California Post-Secondary Education Commission (CPEC)
- Integrated Postsecondary Education Data System (IPEDS)
- Other Colleges and Universities

### **Data Requested**

- CSU Statistical Abstract
- Statistical Reports
- Proficiency and Remediation Reporting
- Integrated Postsecondary Education Data System (IPEDS) – Fall Enrollment
- Integrated Postsecondary Education Data System (IPEDS) – Student Financial Aid Survey

### **Submission Schedule**

- Error free final summer term is due three weeks after the fall census date
- Error free fall profile file is due three weeks after the fall census date
- Error free winter profile file is due three weeks after the winter census date
- Error free spring profile file is due three weeks after the spring census date
- Error free fall/winter/spring final file is due on June 21<sup>st</sup>

NOTE: Final file may include special session admissions that took place after census date.

### **Enrollment Reporting System Teachers (ERST)**

ERST provides information on students who apply to a CSU professional education preparation program. It generates information on major phases of the credentialing process such as applications, admissions, enrollments, and certification and provides information essential for the planning process.

### **Data Steward**

- Analytic Studies

### **Information Requestors**

- Chancellor's Office Executives and Management Staff
- CSU Campus Presidents and Management Staff
- CSU Board of Trustees
- California Legislature
- California Department of Finance
- California Legislative Analyst's Office
- California Post-Secondary Education Commission (CPEC)
- Integrated Postsecondary Education Data System (IPEDS)
- Other Colleges and Universities

### **Data Requested**

- CSU Statistical Abstract
- Statistical Reports
- Ad-Hoc Reports

### **Submission Schedule**

- Data should be submitted by Nov 5<sup>th</sup>

### **Enrollment Reporting System Special Sessions (sERSS)**

The sERSS database provides enrollment data for each matriculated student with term units attempted as of the census date. This information is used to support state budget requests, respond to federal information request and to support research requirements. Information from this database can be obtained by ethnicity, major, citizenship, residence, gender and age.

### **Data Steward**

- Analytic Studies

### **Information Requestors**

- Chancellor's Office Executives and Management Staff
- CSU Campus Presidents and Management Staff
- CSU Board of Trustees
- California Legislature
- California Department of Finance
- California Legislative Analyst's Office
- California Post-Secondary Education Commission (CPEC)
- Integrated Postsecondary Education Data System (IPEDS)
- Other Colleges and Universities

### **Data Requested**

- CSU Statistical Abstract
- Statistical Reports
- Integrated Postsecondary Education Data System (IPEDS) – Fall Enrollment
- Integrated Postsecondary Education Data System (IPEDS) – Student Financial Aid Survey

### **Submission Schedule**

- Data should be submitted by Nov 5<sup>th</sup> for the fall profile
- Data should be submitted by June 21<sup>st</sup> for college year

### **Faculty and Staff**

The Faculty and Staff database provides demographic information on CSU employees as of the October census date of each year. Each employee at a campus is counted only once, in the employment category where the employee has the greatest time-base. Salary and fringe benefit information is available only for faculty classifications. The salary data do not reflect increases that were implemented retroactively.

### **Data Steward**

- Systemwide Human Resources

### **Information Requestors**

- Systemwide Human Resources/Employee Relations Office
- Public
- Chancellor's Office Executives and Management Staff
- California Legislature
- Collective Bargaining Unit - Union 3
- Federal Government
- CSU Executives

### **Data Requested**

- Statistical Abstract
- CSU Facts Sheet
- Profile of CSU Employees
- IPEDS Faculty Salary & Benefit
- American Association of University Professors

### **Submission Schedule**

- Data used are the October files from the State Controller's Office which includes: Employment History, Payscale, and Payment History.



**Fees Database**

The Fees database allows the campuses to input fee level and revenue data into a systemwide database. With direct access to the systemwide fee database, campus users have the capability to view, analyze, and download multiple years of campus fee data.

**Data Steward**

- Budget Office

**Information Requestors**

- Public
- CSU Campuses
- Chancellor's Office
- Executive Order 740
- CSU Board of Trustees

**Data Requested**

- Integrated Post Secondary Education Data System
- Western Interstate Commission for Higher Education
- Financial Aid Reporting
- Summary Level Fee Report

**Submission Schedule**

- Data should be submitted by August

### **Financial Aid Database (FADB)**

The Financial Aid database contains financial aid student eligibility and award data and limited student demographic data for financial aid applicants, as reported by the campus financial aid offices for each award year. The availability of these data enables the Chancellor's Office to respond to requests for information and to analyze the impact of institutional, state, and federal budget and policy proposals relative to the impact on students, particularly those who require financial assistance.

### **Data Steward**

Academic Affairs, Student Academic Support

### **Information Requestors**

- Chancellor's Office Executives and Management Staff
- CSU Campus Presidents and Management Staff
- California Department of Finance
- Legislative Analyst's Office
- California Student Aid Commission
- California Postsecondary Education Commission
- National Center for Education Statistics (NCES)
- U.S. Department of Education
- Miscellaneous Legislators at the federal and state level

### **Data Requested**

- State University Grant (SUG) allocations for CSU campuses
- Integrated Post Secondary Education Data System surveys
- Student Financial Aid Survey
- Institutional Characteristics Survey

### **Submission Schedule**

- Data should be submitted by June 1<sup>st</sup> for the Preliminary Report
- Data should be submitted by September 1<sup>st</sup> for the Final Report

### **Financial Information Record Management System (FIRMS)**

The Financial Information Record Management System is a corporate financial information management system that allows the Chancellor's Office (C.O.) to fulfill its systemwide financial reporting requirements from campus-collected data. FIRMS is used to report end-of-period accounting data as well as to submit budget proposals. Data for General Fund and Auxiliary activities are collected. Each campus extracts the appropriate data from its local financial system and formats the information in a FIRMS compatible format. Data are transmitted electronically to the C.O. via FIRMS for processing. The transmission process includes: file transfers, edit processes, and quality assurance report generated. Data from the campuses are only loaded to the Corporate Data table if the data passes the edit criteria.

### **Data Steward**

- Financial Management Services (FMS)

### **Information Requestors**

- Chancellor's Office Executives and Management Staff
- CSU Campus Presidents and Management Staff
- State Controller's Office
- Bureau of State Audit
- Governor's Office
- CSU Board of Trustees
- California Legislative Analyst's Office
- California Department of Finance
- Integrated Post-Secondary Education Data System (IPEDS)

### **Data Requested**

- Integrated Post Secondary Education Data System (IPEDS Finance Survey) survey
- Preparation of the Annual Consolidated Financial Statements
- GAAP Financial Statements
- Governor's Budget
- Schedule 10
- Financial Reports to the State Controller's Office
- Internal and external audiences as needed

### **Submission Schedule**

- Accounting Data – quarterly
  - 1<sup>st</sup> qtr      October 15<sup>th</sup>
  - 2<sup>nd</sup> qtr      January 15<sup>th</sup>
  - 3<sup>rd</sup> qtr      April 15<sup>th</sup>
  - 4<sup>th</sup> qtr      July 16<sup>th</sup> pre-closing and July 31<sup>st</sup> post-closing
- Budget Data – annually August 17<sup>th</sup>

**Fund Attribute Table (FNAT)**

The FNAT table is used to define the NACUBO program codes and maps the PeopleSoft Fund table to the FIRMS FNAT keys. After underlining tables such as the Appropriation table have been updated, the FNAT keys are automatically generated for every unique string of attributes created by the Financial Management Services (FMS) group.

**Data Steward**

- Financial Management Services (FMS)

**Information Requestors**

- California Department of Finance
- Chancellor's Office
- CSU Campuses
- State Controller's Office

**Data Requested**

- FIRMS Process
- PeopleSoft Financial Process (such as Claim Schedule, SAM99, etc.)

**Submission Schedule**

- Data are updated on an as needed basis

### **Governor's Teaching Fellowships**

The Governor's Teaching Fellowships application monitors the recipients of the 20 million dollars in the Governor's Teaching Fellowships for graduate student who agree to teach at a low-performing school for four years as set forth by Executive Order 791.

### **Data Steward**

- Teach Education Public School Program

### **Information Requestors**

- Chancellor's Office Executives and Management Staff
- Commission on Teacher Credentialing
- Legislative Analyst Office

### **Data Requested**

- Annual report, for each higher education institution, on the numbers of Fellows who received funds, the number of Fellows who completed teacher preparation programs, and the places of employment of Fellows who completed teach preparation programs

### **Submission Schedule**

- Fellows report their status information to the Chancellor's Office on a bi-annual basis (April and October)

**Grievance & Arbitration**

A web-based application that provides systemwide tracking of CSU employee filed grievances and arbitration related information. This application will allow Labor Relations to track each case as it progresses through various levels. The level at which the grievance is transferred to Labor Relations varies by bargaining unit, thus requiring continuous interaction between campus and the CO. Email communications are automatically sent to the respective bargaining unit when a grievance is filed and/or closed.

**Data Steward**

- Systemwide Human Resources – Labor Relations

**Information Requestors**

- Chancellor's Office
- CSU Board of Trustees
- CSU Campuses
- CSU Collective Bargaining Union
- Other Colleges and Universities
- Public

**Data Requested**

- Data are used for the purpose of employee filed grievance and arbitration

**Submission Schedule**

- Data are updated on an as needed basis

**Instructional Equipment**

The Instructional Equipment Report (IER) is the annual request for campuses to report their inventory of instructional equipment. The report information is used to derive annual depreciation, which is one of the nine major cost factors determining CSU marginal cost enrollment growth funding per additional Full-Time Equivalent Student (FTES).

**Data Steward**

- CSU System Budget Office

**Information Requestors**

- Chancellor's Office
- CSU Board of Trustees
- Department of Finance
- Governor's Office

**Data Requested**

The depreciation derived from the inventory reports is used to identify CSU instructional equipment funding per full-time equivalent student, instructional equipment funding deficiencies, to compare costs with the University of California concerning relative support budget needs and to explain funding requests to the Department of Finance. The Chancellor's Office uses each campus' share of total depreciation in preparing the annual marginal cost calculation as a factor of CSU enrollment growth funding.

**Submission Schedule**

- Data are submitted on an annual basis; by August

**Library Special Collections**

The system stores descriptive summaries of special collections maintained by CSU campus libraries. The system is accessible by the public through a website that enables searches by collection name keyword and campus.

**Data Steward**

- ITS – Systemwide Library Initiatives

**Information Requestors**

- Public

**Data Requested**

- Description and location of special collections

**Submission Schedule**

- Campuses may submit and update collection information at any time



**Lower Division Transfer Programs (LDTP)**

The Lower Division Transfer Pattern (LDTP) is a course review system used for review of lower division community college courses. This system enables CSU faculty and staff to manage the course review process for LDTP articulation from assignment, reviewing to final approval online. LDTP is operating in conjunction with the Project Articulation System Stimulating Interinstitutional Study Transfer (ASSIST) Coordination site.

**Data Steward**

- Student Academic Support

**Information Requestors**

- California Community Colleges
- Chancellor's Office
- CSU Campuses

**Data Requested**

- Data are used to decide on whether or not community college courses meet CSU requirements for lower division major course work

**Submission Schedule**

- The schedule for receipt of the data from ASSIST is as follows:

February 15 <sup>th</sup>	Winter
April 20 <sup>th</sup>	Spring
October 15 <sup>th</sup>	Fall

**Notify Database**

The Notify Database is a meta-directory for tracking and managing accounts for all Enterprise applications.

**Data Steward**

- Enterprise Systems Group

**Information Requestors**

- Chancellor's Office
- CSU Campuses

**Data Requested**

- Not applicable

**Submission Schedule**

- Data are updated on an needed basis

**Online Services for Curriculum Articulation Review (OSCAR)**

OSCAR is an online application for both California State University and University of California committees to use for reviewing all the CSUGE/IGETC courses from assignment, reviewing to final approval online so that the CSUGE and IGETC lists for the coming year can be published in a timely manner.

**Data Steward**

- Academic Programs

**Information Requestors**

- Chancellor's Office
- CSU Campuses
- ASSIST

**Data Requested**

- Intersegmental General Education Transfer Curriculum (IGETC) course certification list
- CSU General Education (CSUGE) course certification list

**Submission Schedule**

- Data are submitted by ASSIST on an annual basis from January through December 15<sup>th</sup>

### **Seniority Points Calculator**

A web-accessible Seniority Points Calculator was created in spring 2009 to assist campuses with generation of seniority lists of staff who are members of collective bargaining units. The system generates seniority points based on data maintained in the PIMS Employee History file, and provides campuses with the ability to perform manual corrections and updates to the Seniority Points Calculator. Although the Seniority Points Calculator is a very useful tool, it was not meant to replace the reasoned human judgment, human resources expertise, and management decision making.

### **Data Steward**

- Systemwide Human Resources

### **Information Requestors**

- Systemwide Human Resources/Employee Relations Office
- Chancellor's Office Executives and Management Staff
- Collective Bargaining Units
- CSU Executives

### **Data Requested**

Reports can be generated which show the seniority points history by staff member and staff rosters by class code in seniority points rank order.

### **Submission Schedule**

- Data are updated on an as needed basis

**Service Ticket**

The Service Ticket system is an internal ticket system used by the Enterprise Systems Group for support requests received from the CSU campuses and Chancellor's Office staff.

**Data Steward**

- Enterprise Systems Group

**Information Requestors**

- CSU Campuses
- Chancellor's Office

**Data Requested**

- Not applicable

**Submission Schedule**

- Data are updated on an as needed basis

### **Space and Facilities Database (SFDB)**

The Space and Facilities database provides information about facilities and rooms within the facilities. Each campus maintains its own space and facilities inventory which provides planning and management data. The data provides information about: (1) facilities and (2) rooms within the facilities. It also serves as the campuses' official record of existing space. The SFDB is used in the analysis of the capital outlay budget change proposals (COBCP), space needs, space utilization, and other space and facility related issues and reports.

### **Data Steward**

- Capital Planning Design and Construction

### **Information Requestors**

- Chancellor's Office
- Campus CPDC Office
- CSU Board of Trustees
- California Legislature
- California Department of Finance

### **Data Requested**

- Capital Outlay Books and companion documents
- CSU Statistical Abstract
- ASF/FTE Model

### **Submission Schedule**

- The SFDB is updated annually, though campuses may update their local systems more frequently. The "reporting window" is May 1<sup>st</sup> through May 31<sup>st</sup>

### **Special and Minor Capital Outlay Database**

The Special and Minor Capital Outlay database contains campus data to help manage minor capital, special repair, energy, and other projects funded through the Chancellor's Office. All projects funded by the Chancellor's Office are entered into the database for review, considerations and hopefully approval. During the term of a project, expenditures are recorded. With both campus and Chancellor's Office maintaining a common set of records, funding requirements and reporting are more easily maintained and modifications better handled.

### **Data Steward**

- Capital Planning Development Construction

### **Information Requestors**

- CO Executive and Management Staff
- California Department of Finance
- California Department of Analyst's Office
- CSU Board of Trustees
- CSU Campus Presidents and Management Staff

### **Data Requested**

- Ad Hoc Reports

### **Submission Schedule**

- Data should be submitted by April (two budget year ahead; example: for budget year 2006-2007 the data requested is for budget year 2008-09)

**University Advancement Database**

The University Advancement Database provides for the collection of campus advancement expenditure data, dissemination of standard reporting, and data mining functionalities. The expenditure data collection uses a modified methodology developed by the national associations of the Council for Advancement and Support of Education (CASE) and the National Association of College and University Business Officers (NACUBO). The data are integral to the accountability reporting to the Board of Trustees, campus leadership, donors, and is used in presidential evaluations and organizational assessments.

**Data Steward**

- Systemwide University Advancement

**Information Requestors**

- Public (CSU Advocates)
- CSU Board of Trustees
- CSU Campus Presidents and Management Staff

**Data Requested**

- Ad Hoc Reports

**Submission Schedule**

- Data should be submitted on an annual basis by January



**Wealth Screen**

The Wealth Screen is designed to promote the California State University system and campuses by informing alumni, students, parents, faculty, staff and friends of the University about the CSU's role in educating the state's workers and residents as well as to engage that community as advocates on behalf of the CSU and local campuses. Systemwide messaging will be used as a communications tool as well as an advocacy tool.

**Data Steward**

- University Advancement

**Information Requestors**

- Chancellor's Office
- CSU Campuses
- Public (CSU Advocates)
- Office of Advocacy
- Institutional Relations (AIR)

**Data Requested**

- Transmission of statewide calls
- Communications to CSU advocates

**Submission Schedule**

- Transmission of communications are on an as needed basis

**Year End System**

The Year End System (YES) is a financial consolidation tool used to collect and consolidate campus financial statements. The system is also used to generate systemwide CSU financial statements.

**Data Steward**

- System Financial Operations

**Information Requestors**

- CSU Board of Trustees
- State Legislature

**Data Requested**

- Statement of Net Assets
- Statement of Revenues and Expenses

**Submission Schedule**

- Data are submitted annually by campuses approximately December of each year