Cal Poly, San Luis Obispo Financial Data Portal

Navigation tips for general use

- OpenBook allows you to explore historical finances in a simple and dynamic graphical user interface.
- OpenBook utilizes "visualizations" to display financial information. The homepage displays the various visualization cards available to the user including a description of the visualization at the bottom of the card to aid in selection.
- Select your desired visualization by clicking on the card.
- Use the **Explore by** drop-down in the upper left corner to specify the category you would like the data organized by in your chart, graph, or table. Note that most, but not all, visualizations contain multiple ways to categorize data by using this feature.
- Use the **Sorted by** drop-down towards the upper right to re-arrange how data is sorted.
- Use the drop-down next to the fiscal year towards the upper left to alternate between fiscal years.
- Use the **Find** bar within each visualization to find exactly what you are looking for.
- There are four different types of visual representations of the data within each visualization that can selected by clicking on the corresponding tab:
  - **Amount:** Displays a **bar chart** with data broken down by category.
  - **Percentage:** Displays a **pie chart** showing each category relative to the total amount.
  - **Summary:** Displays numerical data in **table** format.
  - **History:** Displays a **line graph** showing data over a five year time period.
- Hover over a graph/chart within the **Amount, Percentage,** and **History** tabs to view numerical values.
- Click on the desired section of a chart, graph, or table to zoom in to a more detailed visualization.
- The gray bar at the top of the screen displays breadcrumbs allowing you to zoom out to a previous visualization.

- Use the **California Polytechnic State University** button in the top left corner to return to the homepage.

- Use the **Help** icon represented by a question mark (?) at the top right to prompt the help guide. Note that the help guide displays information tailored to where you are located on the website. For example, if you are on the homepage, the help guide will assist you in navigating to a visualization. If you have selected a visualization the help guide will display useful information related to the functionality of that visualization.

- Use the **Feedback** icon represented by a message bubble at the top right to contact OpenBook.

- Use the **Share** icon at the top right to:

  - Share your visualization through social media.

  - Obtain a link to your visualization to share via email.

- Use the **Data Export** button in the bottom left corner to download data to a spreadsheet. This will export <u>all</u> of the detail data that supports the visualization within that card.

- Right click on a chart or graph to save or copy it as an image.