

# Cal Poly, San Luis Obispo Financial Data Portal

## Navigation for Student Success Fee/College Based Fee/Cal Poly Plan

These instructions will guide the user to see how expenditures funded by Student Success Fee, College Based Fee, or Cal Poly Plan have been spent. Cal Poly's OpenBook website contains a visualization card for each fee to aid in this purpose. The user can zoom in on specific categories for further analysis.

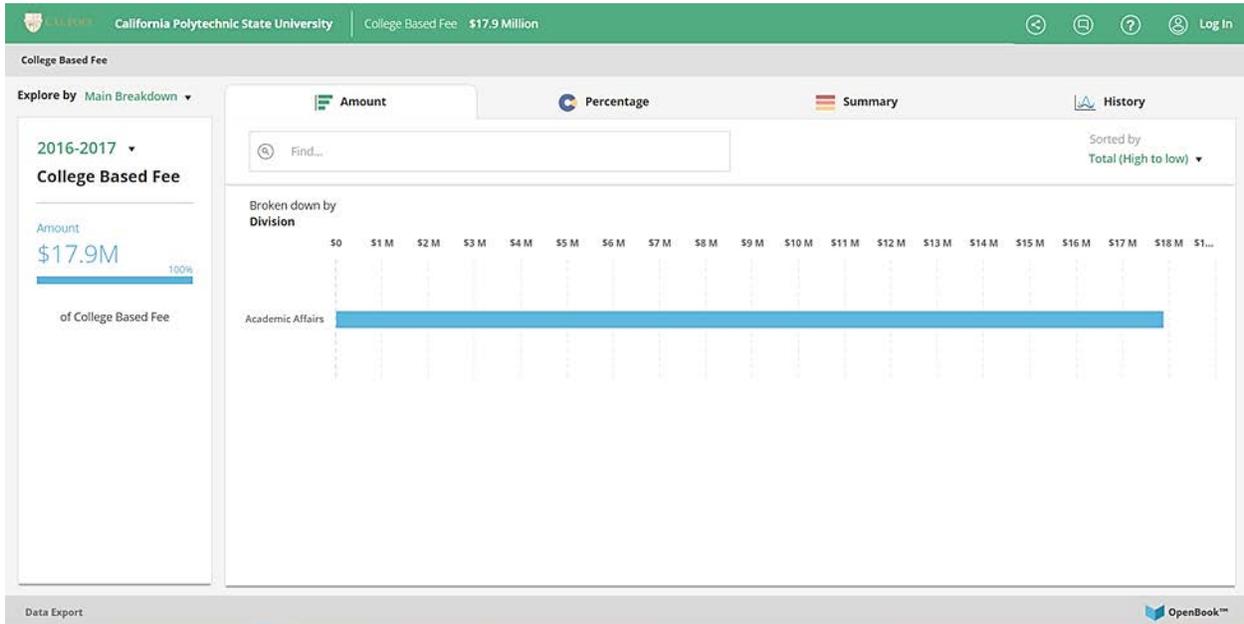
<p>Begin on the Cal Poly OpenBook homepage. The homepage displays all visualization cards available to the user, including one card each for expenses funded by Student Success Fee, College Based Fee, and Cal Poly Plan.</p>	 <p>The screenshot shows the Cal Poly OpenBook homepage. At the top, there is a header with the Cal Poly logo and the text "California Polytechnic State University CAMPUS DATA VISUALIZATIONS". Below the header, there is a section titled "Select a Visualization to Explore" which contains three cards. The first card is for "Cal Poly Plan" with a value of "\$4 Million" and a subtitle "A five-year historical look at how Cal Poly Plan funds have been spent". The second card is for "College Based Fee" with a value of "\$17.9 Million" and a subtitle "A five-year historical look at how College Based Fee Revenue have been spent". The third card is for "Cal Poly General Operating Fund Expenses" with a value of "\$324.7 Million" and a subtitle "A five-year historical look at actual expenses within the General Operating Fund".</p>
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<p>Simply click on the visualization card pertaining to the fee you want to view.</p>	 <p>The screenshot shows the "Student Success Fee" visualization card. It has a blue header bar, the title "Student Success Fee", a value of "\$17.7 Million", and a subtitle "A five-year historical look at how Student Success Fee Revenue have been spent".</p>	 <p>The screenshot shows the "College Based Fee" visualization card. It has an orange header bar, the title "College Based Fee", a value of "\$17.9 Million", and a subtitle "A five-year historical look at how College Based Fee Revenue have been spent".</p>	 <p>The screenshot shows the "Cal Poly Plan" visualization card. It has a blue header bar, the title "Cal Poly Plan", a value of "\$4 Million", and a subtitle "A five-year historical look at how Cal Poly Plan funds have been spent".</p>
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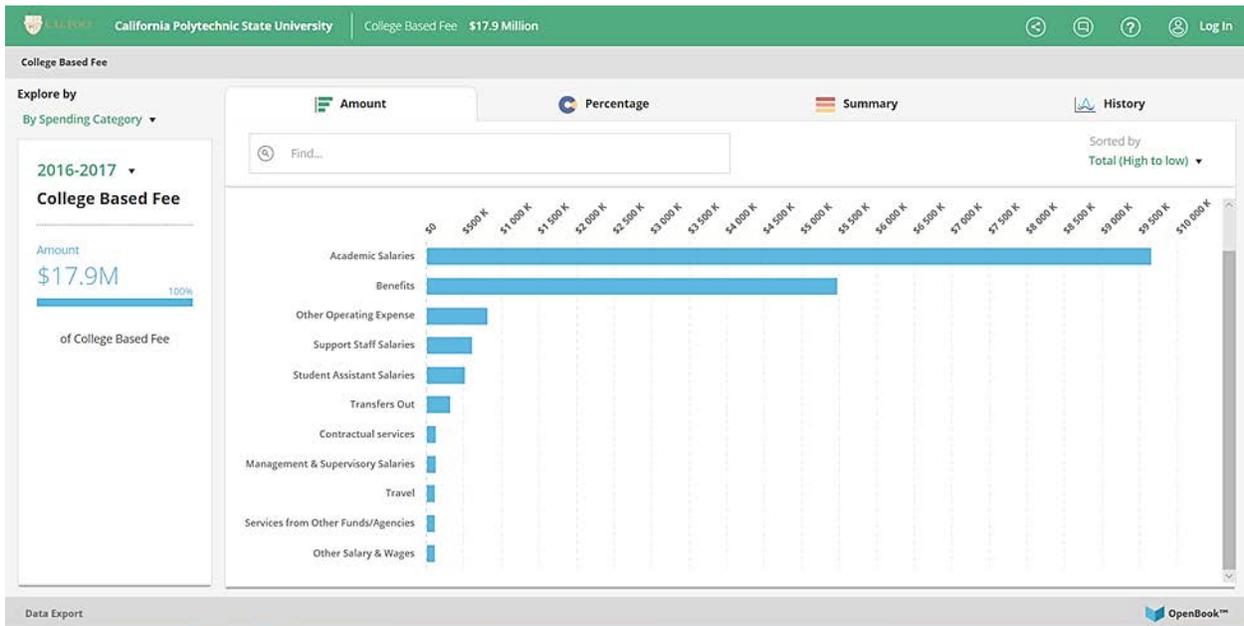
In the examples below, the user has selected the College Based Fee visualization card. The user has four different types of visual representations to select from depending on how they want to view the information, and can alternate between them by selecting the corresponding tab. The user can also select how data is categorized by using the Explore By drop-down. Example 1 shows the default screen after the user has selected the visualization card, which defaults to the Amount view and categorization by division. In Example 2, the user has used the Explore By drop down to change how data is categorized to By Spending Category. Finally, in Example 3 the user has selected the Percentage tab to view the same data in a Pie Chart format.

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**Example 1** – The user has selected the College Based Fee visualization card. This is the default view.

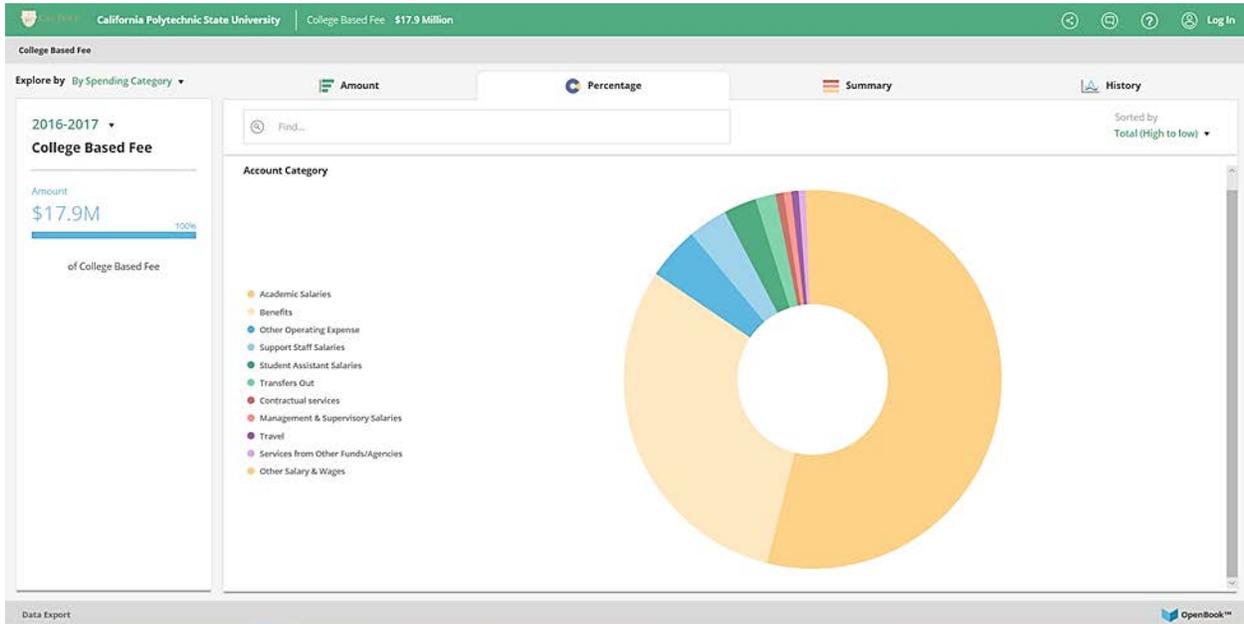


**Example 2** – The user has changed how data is categorized to By Spending Category using the Explore By drop-down towards the upper left corner.



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**Example 3** – The user has changed to a view displaying the same data in a pie chart by selecting the Percentage tab.



The user can also zoom in on a category within any tab to obtain more detailed information. In the example below, the user wanted to see how College Based Fee funded expenses were spent by college within the Academic Affairs division. The user clicked on the blue bar next to Academic Affairs (from Example 1 above) to zoom in.

