OpenBook FAQ

Q: What is OpenBook?
A: OpenBook is a financial transparency website which displays government finances over a multi-year period. There are several "visualizations card" available that allow the user to explore various aspects of the University's finances.

Q: Is there a help guide within the OpenBook website?
A. Yes. Select the question mark (?) icon in the upper right-hand corner. The help guide tailors the information depending on where you are 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.

Q: How do I select the data I want to see?
A. Data is organized by visualization cards on the home screen. Select the visualization that best meets your needs by referring to the description at the bottom of each card. Once you have chosen a visualization, there are four ways the data can be viewed. Above the visualization you may select the following options: Amount, Percentage, Summary, and History.
> Amount: Displays data in a bar chart format
> Percentage: Displays data in a pie chart format
> Summary: Displays numbers in a table format
> History: Shows how data has changed over time utilizing a line graph format

Q: How do I see the actual numbers within the graphs/charts?
A. Hover over any area of a graph/chart to see the numbers when viewing within the Amount, Percentage, or History tabs. Selecting the Summary tab allows one to view numbers in a table format.

Q: Can I see the data in a different graph?
A. Yes, by selecting Amount, Percentage, Summary, or History, the data is presented differently depending on your preference.

Q: Are there different ways to view the data (e.g. by account rather than area)?
A. Potentially. When available, a user can select the drop down menu next to "Explore by" in the upper left of your screen to change the way data is categorized. Each visualization contains at least one category, however many contain an additional view to look at the data.

Q: How do I see more detailed information?
A. "Zoom in" or "drill down" to a category by hovering over the desired category and clicking for more detailed information. For example: when viewing a report categorized

by the University's divisions, click on the desired division to view a visualization categorized by your selected division's college/area. This feature can often be repeated multiple times to get to the lowest level detail view. The search bar can also be used if you are looking for something in particular.

Q: Can I save the data I am looking at?
A. Yes, there are several features that allow you to save the data you are viewing. Use the Data Export button in the bottom left corner to export the data to a spreadsheet. Note that this will export <u>all</u> of the detail data that supports the visualization within that card. Use the Share button in the upper right corner to share a visualization on a social network or by email. Lastly, right click on the chart to save or copy as an image.

Q: Can I create custom visualizations?
A. At this time only Cal Poly OpenBook Administrators can create visualizations and publish for the public.

Q: Why are there sometimes spikes in one year?
A: In reviewing multiple years of data, you may see "spikes" in the individual years; this can be due to unexpected expenses, such as a hard winter, equipment failure, a capital project, or a specific event that required additional funds. You can drill-down into our OpenBook site to learn more about how exactly those expense or revenues are categorized.