



Budget Center – *Frequently Asked Questions*

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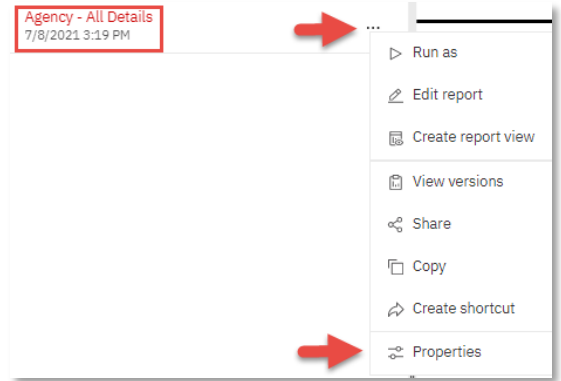


Cognos – Report Descriptions

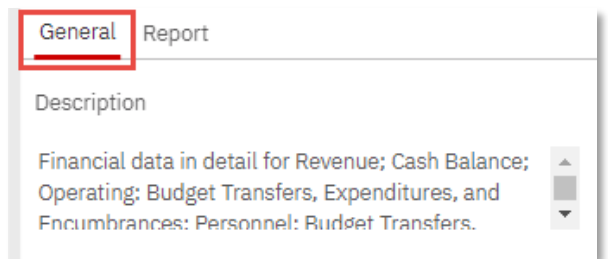
Where can I find a description of what’s included in a report?

There are two places this information is available:

1. Report properties
 - a. Go to the report in the Cognos navigation on the left side of the screen.
 - b. Click the ellipsis “...” to the right of the name of the report
 - c. Select “Properties” from the drop-down list



- d. You will find a description of the data in the report under the “General” tab.



2. Reggie Head (on all except All-Details)
 - a. Select a report in Cognos to view.
 - b. Click on the Reggie head at the top of the report.
 - c. The Data Cookbook pop-up will open with the report purpose, description, and related definitions.





Cognos – Running Reports

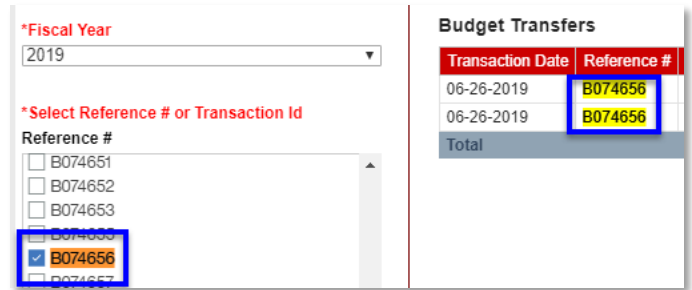
Can I search for data in report prompts and data returned?

Yes. “Ctrl F” can be used to search for text in the report prompts and report content.

1. Hold the “Ctrl” key and select “F”.
2. Type the text to search for and click Enter.

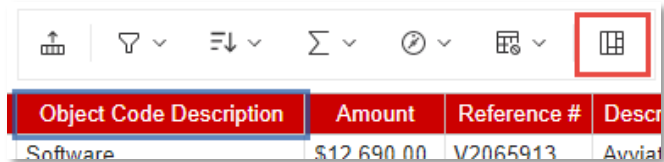


3. Results
 - a. The report prompt drop-down list will highlight and shift to show the text you’ve searched.
 - b. If you’ve run the report, the searched text will also be highlighted in the report content.



How can I group/sort data returned in a report based on specific data in a column of returned results?

Most reports in the Budget Center package are interactive. This report type allows users to create their own edits such as sorting, grouping, filtering and summarizing data items.



To group data in returned results:

1. Click the column header of the data item you wish to group by. ([Object Code Description](#))
2. Click the [Group icon](#)

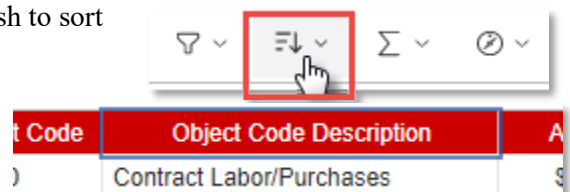
This will group the returned list of data on each different result in the column selected. A subtotal is provided for each grouped section of data and a grand total is provided at the bottom.

See the [Budget/Transfer Center - User Guide](#) for other tips on using the interactive toolbar.

To sort data in returned results:

1. Click the column header of the data item you wish to sort by. ([Object Code Description](#)).
2. Click the Sort icon.

This will sort the returned list of data on each different result in the column selected.



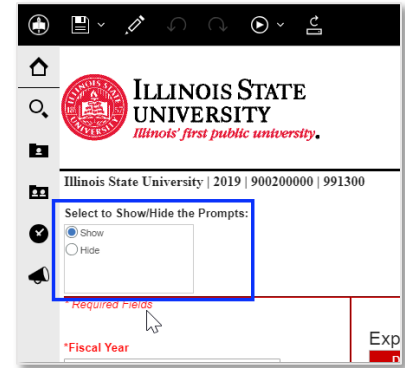
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How do I change my selected prompts while viewing a drill-through report?

In a drill through report, you can change your prompt selections at any time.

1. Under **Select to Show/Hide the Prompts** click the **Show** radio button.
2. Use the prompt section of the report to enter the prompts of your choice.




Remember

- Fields in red are required
- Enter prompt selections from top to bottom
- To narrow down Unit results, fill in additional prompts
- Umbrella and Object need to correlate in order to get results

Note: When **Fiscal Year** is changed, all other prompts are cleared and need to be reentered.

How do I change my selected prompts while viewing the All-Details report?



The All-Details report prompt page is separate from the report viewer page. To change the prompts, first

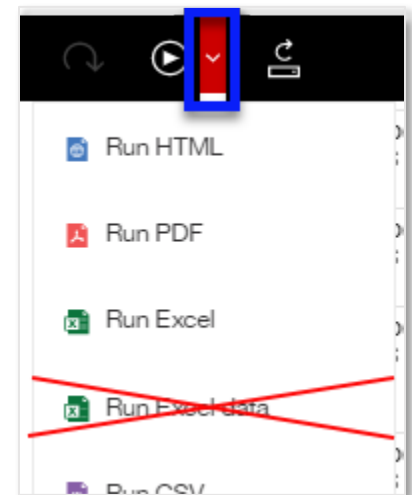
click on the run arrow button  in the black header bar. This will take you back to the Prompt Page. Change the desired prompts and click the **Submit** button.

Which Excel format option should I select when exporting my report?

When working in Budget Center, always select the **Run Excel** option. Do NOT select Run Excel Data. ONLY Run Excel will pull all your data items and report results.




After viewing the report in PDF format, how do I return to the default view?

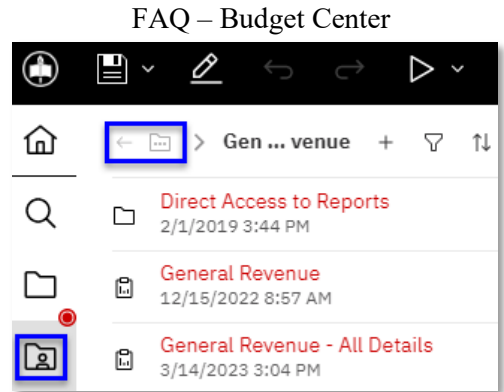
To view a report in PDF format, click the **Run** dropdown arrow  then select **Run PDF**. To return to the default view, click the **Run** dropdown arrow  again, then select **Run HTML**.






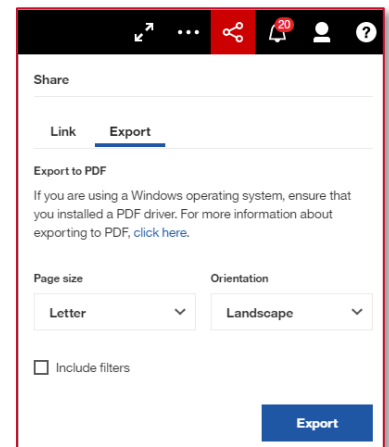
How do I navigate to a different report?

While viewing a report, you can navigate to a different report at any time. Click the [Team Content](#) icon  on the navigation pane on the left side. Cognos will remember your previous folder selection. Either select from the report and folder options or go back out to a different folder. To navigate to a different fund or folder, click the back arrow  or folder with more dots  in the top left of the pane.



How can I print a Dashboard for sharing?

1. Run the dashboard that you want to share.
2. Select the “Share” icon  at the top right of the webpage.
3. Select “Export” to export to PDF.
4. Change the orientation to “Landscape”.
5. (Optional) Check the “Include Filters” box to have a list of the filters you’ve applied to the dashboard included in the printed version.
6. Click the “Export” button to create the PDF.
7. Print in color.



Cognos – Data in Reports

I entered data in Colleague, Transfer Center, or iPeople. When will I see it on my reports?

Ensure it has been at least one day since the information was entered or the transfer has been made.

Where can I find the expenditure, encumbrance, and total information for an employee in the current fiscal year?

For the funds Bond Revenue, General Revenue, and INTO Joint Venture, this information is all available on the **Personnel – Budget Summary** report. ([Team Content](#) > [Budget Center](#) > [Reports](#) > *the fund folder of your choice* > [Direct Access to Reports](#) > [Personnel](#))

For the funds Agency, Foundation, Grants and Contracts, and Lab Schools, this information is all available on the **Personnel – Position/Employee Summary** report. ([Team Content](#) > [Budget Center](#) > [Reports](#) > *the fund folder of your choice* > [Direct Access to Reports](#) > [Personnel](#))



How can I view all expenditures and encumbrances for an employee paid from multiple accounts/units?

If an employee is paid from multiple units, the **Personnel - Budget Summary** report ([Team Content](#) > [Budget Center](#) > [Reports](#) > *the fund folder of your choice* > [Direct Access to Reports](#) > [Personnel](#)) must be run for each unit to see the full picture of expenditures and encumbrances for an employee.

Is there still a lag between personnel expenditures and encumbrances?

No, there's no lag (or overlap) between personnel expenditures and release of encumbrances.

Is there a lag between personnel expenditures showing in Cognos reports and personnel expenditures in Colleague?

Yes and no, personnel expenditures in summary will show in Cognos reports (personnel summary section) once uploaded to Colleague. Personnel expenditures in detail will show in Cognos reports (line-item details section) as soon as Payroll is processed for that pay period. There may be a delay of a few days between payroll processing and uploading payroll expenditures to Colleague.

How do I find my Agency cash balance?

You can find your cash balance in a couple of reports:

- **Agency – “Top-Level”** report ([Team Content](#) > [Budget Center](#) > [Reports](#) > [Agency](#) > [Agency](#)) and see the “Cash Balance” section.
- **Agency – All Details** report ([Team Content](#) > [Budget Center](#) > [Reports](#) > [Agency](#) > [Agency – All Details](#)) and view the Cash Balance tab.

What Cognos reports provide expenditure data by object rather than umbrella?

Expenditure reports include a column that shows the object of each transaction in the data returned. The expenditure data can be [grouped or sorted](#) by the object for further analysis.

The Operating – Object Code Detail report ([Team Content](#) > [Budget Center](#) > [Reports](#) > *the fund folder of your choice* > [Direct Access to Reports](#) > [Operating](#)) is also available for the following fund sources: Agency, Bond Revenue, General Revenue, Grants Contracts, INTO JV, Lab Schools, and Service Accounts. You may select one or more objects in the prompt on the left of the screen to indicate the objects for which you'd like data returned in the report.

Are there revenue and expenditure reports that can be run for a specified date range?

Yes. The following reports in Cognos are run based on a specified date range.

1. Revenue by Date Range – available for Agency, Bond Revenue, Lab Schools, and Service Account funds.
2. Operating Expenditures by Date Range
 - a. By Umbrella Level Expenditures - available for Agency, General Revenue, Grants and Contracts, Lab Schools funds.

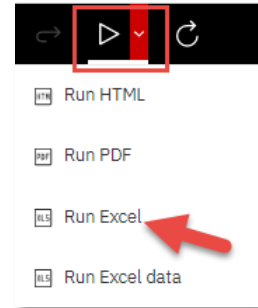


- b. By Object Level Expenditures – available for Bond Revenue and INTO JV funds.
- c. By Unit Level Expenditures – available for the Service Account fund.
- 3. Personnel Expenditures by Employee by Date Range – available for Agency, Bond Revenue, General Revenue, Grants and Contracts, INTO JV, Lab Schools, and Service Account funds.

How can I review expenses grouped and subtotaled by object?

Expenditure reports include object code as a column. This information can be grouped and subtotaled in the following ways:

- Follow the instructions for [grouping functionality](#).
- Extract expenditure data returned into excel for further manipulation and review. To extract the data to excel:
 - Run the report
 - Select “Run Excel” from the drop-down menu
- Run the expenditure “... Object Code Detail” report. The prompts for data returned for this report includes object code.




What reports are available in Cognos that can be run for multiple funds in a fund source?

The All-Details report can be run for multiple funds for the following fund sources: Agency, Bond Revenue, Grants and Contracts, and Service Accounts. When selecting report prompts to indicate the data to be returned, *do not* select a Fund. This will include data for all funds in the fund source for the fiscal year and units selected.

Cognos – Subscriptions

The Fiscal Year has changed and the data in my subscription is no longer relevant. How do I change the prompts for my Budget Center subscriptions?

The Budget Center subscriptions prompts cannot be modified. Your old subscriptions will need to be deleted and new ones will need to be created. To create a subscription, follow the steps below. To delete a subscription, follow the steps under, [How do I delete a subscription?](#)

1. Open the report you wish to subscribe
2. Enter the desired prompts
3. From the report viewer screen, click the [More](#)  dots icon in the upper right corner.
4. Click [Subscribe](#).
5. Use the **Repeat on** field to select the days of the week the report will be run and sent.
Depending on the day(s) of the week you wish to receive the subscription, you may need to unselect the current day of the week.
6. Use the **Time** field to enter the time the report will be run and sent.
Most information is updated overnight. For the most up-to-date report, enter a time after 4:00AM.



7. Click the [arrow >](#) at the end of the **Format** field.
 - a. Confirm **HTML** is selected.
 - b. Select [Excel](#).
 - c. Click the [Done](#) button.

8. Click the [arrow >](#) at the end of the **Delivery** field.
 - a. Select [Send report by email](#).
 - b. When two options appear, choose between [Attach the report](#) and [Include a link to the report](#). Both can be selected.

[Attach the report](#) – Report will be delivered as an attachment. This is a good option if you wish to check historical data later down the road. Drill-through reports cannot be accessed from the attachment.


[Include a link to the report](#) – Report will be delivered as a link to Cognos. You will need to log into Cognos before viewing the report. Old subscription links will show updated information as of the last overnight refresh, not as of when the subscription was sent.
 - c. Confirm [Save report](#) is selected.
 - d. Click the [Done](#) button.
9. Click the [Create](#) button.


Can I change the name of my subscription or add a description?

No, you cannot change the name of the subscription, nor can you add a description. The first subscription you create of a report will be the report's name. Each subscription after that will have a number after the name. For example: My General Revenue – All Details, My General Revenue – All Details (1), My General Revenue – All Details (2)

I no longer want to receive the subscription emails; how do I delete a subscription?

To delete a report subscription, follow these steps:

1. Click the personal menu  icon.
2. Click [My schedules and subscriptions](#).

Subscriptions are displayed in the order they were last modified (created or edited.) The most recent subscription created will be at the bottom of the list.
3. Hover over the subscription you wish to delete. Click the [More](#)  dots that will appear to the right of the subscription.
4. Click [Remove this subscription](#) to delete.

Cognos – Helpful Tips

Which web browsers are supported?

Budget Center is best used on Google Chrome. Before accessing Cognos, confirm you are on a secure ISU network. (Either on campus or using VPN.)

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Ongoing Web Browser Updates

Be aware that web browsers are updated every week or two. Occasionally, these updates cause issues such as prompts not appearing, not being able to download reports, and slow run times. Check the home page of our website TechSolutions.IllinoisState.edu/EDA for updated browser information.

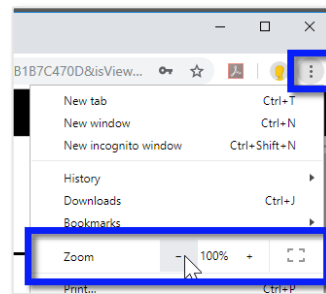
What is the best way to access Cognos?

You can access Cognos by either using the button in My Illinois State, or by going to Insight.IllinoisState.edu. Before accessing Cognos, confirm you are on a secure ISU network. (Either on campus or using VPN.) Then use your ULID and password to sign in.

I cannot see everything on a screen. How can I see the entire screen?

You may need to resize your browser. When the browser is too zoomed-in, the entire window may not display. These windows do not have a scroll capability. To view the entire window, use the options in the top, right of your browser to zoom out. These options vary slightly depending on the browser you are using. The screen capture to the right is using Google Chrome.

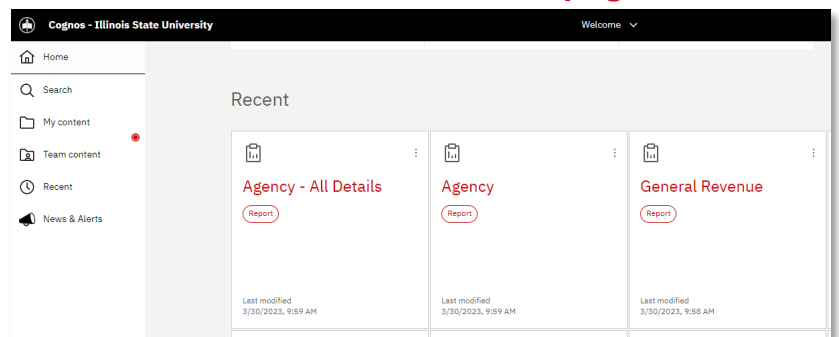
You may also hide or show the prompts on the left side of the page. Hiding the prompts will provide more room for the report to be displayed.



Cognos – Troubleshooting

Why doesn't my report open from the *Recent* tile on the Welcome page?

Many users use the *Recently viewed* folder on the navigation pane or *Recent* tiles in the middle of the *Welcome* page to open reports they frequently view. Occasionally updates are made to existing reports. When the reports are updated the *Recent* tiles, and items in the *Recent* portion of the navigation pane will break.



When a recent report link stops working:

1. Click the **Team Content** folder on the navigation pane.
2. Click the Budget Center folder.
3. Click the **Dashboard** or **Report** folder accordingly.
4. Select the report you wish to open from the options.

Once you have opened the report through the normal folder navigation, the recent link will work again.

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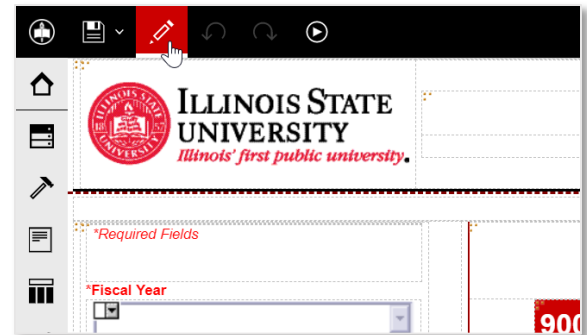
Why is my report not rendering back any results?

After entering prompts and clicking the [Submit](#) button, users occasionally do not get results back. If this happens, check one of the following:

- Confirm all required prompts have been entered. All red and asterisked prompts must be entered before report results will be displayed. Be aware that if you add or change the *Fiscal Year* prompt all other prompts will be cleared and will need to be reentered.
- Confirm all prompts match in a way that will render results. The Unit, Umbrella, and Object prompts do not filter based on prior selections. For example, if the selections, *Unit – Legal Services*, *Umbrella – Travel*, and *Object – Legal Fees and Services* were made, no result would be returned because Legal Fees and Services object falls under the Contractual umbrella, not the Travel umbrella.
- There may be no result to retrieve. Confirm the data exists in the source.

The report page is not displaying as I expect and the *Edit* icon is in a red box. How do I go back to the regular report view?

When the *Edit* icon on the left side of the toolbar is clicked, the report editor will open. When the report editor is open, the *Edit* icon will be in a red box. To close the report editor, click the *Edit* icon a second time. The red box will disappear.



The prompt screen never displayed after clicking on a report. How do I select my prompts?

Occasionally, the prompts will not load, and the screen will remain blank after clicking on a report. When this happens, click your browser's refresh button. This will refresh the page and should load the prompts. It is possible the report editor will open after clicking your browser's refresh button. If this happens, see [Close the Report Editor](#).

Why doesn't anything happen when I click a hyperlink drill-through?

All top-level reports in the Budget Center package, as well as several detailed reports, have hyperlinks that open drill-through detailed reports. These additional reports open in a second tab of the web browser. For this to work correctly, your browser may need the pop-up blocker turned off. Each browser alerts the user it has blocked a pop up differently. Locate the alert, then select always allow pop-ups for insight.illinoisstate.edu.


Commodities 10100 07 900200	
Opening Permanent Budget	Current Permanent Budget
\$244,183.00	\$244,183.00
Current Budget*	Expenditure
\$228,603.00	\$226,029.01

When I click on a report, it immediately downloads an Excel file and does not open the report. How do I view the report in Cognos?

If Cognos immediately downloads an Excel file when you click on a report, your default report format setting was changed. To change it back, follow these steps.

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1. Click the personal menu icon  on the right side of the toolbar.
2. Click [My preferences](#).
3. Use the *Report format* dropdown to select [HTML](#).

Not all my report results are displaying. How do I see the rest of the information?

Reports display a limited number of results per page. If there are more results than will fit on a page, the links *top*, *page up*, *page down*, and *bottom* will appear in the bottom, left corner. Click these links to see the additional results. When the report is exported to Excel, generally all results will display on the same sheet. However, some reports may present on multiple tabs in Excel.

Budget Transfers

Can I look up a specific budget transfer in Budget Center?

Yes!

1. Navigate to the *Direct Access to Reports* folder. ([Team Content](#) > [Budget Center](#) > [Reports](#) > the fund folder of your choice > [Direct Access to Reports](#))
2. Select [Operating](#) or [Personnel](#).
3. Click on the [Budget Transfer Details](#) report. (The report title will have something in front of it such as **GR Operating** or **Agency Personnel**. Exactly what is in front of the report title will depend on your folder selection.)

You can look up a specific budget transfer by either Colleague Reference Number or Transaction ID.

Can I do Agency budget transfers through the new Transfer Center?

No, Agency budget transfers will still be requested through the Budget Office.

(UniversityBudgetOffice@ilstu.edu)

I'm getting an error when entering a budget transfer. How can I fix this?

Things to check on:

1. All fields must be completed when entering a budget transaction: fiscal year, transfer type, fund type, transfer description, account/description, amount and comments.
2. When searching for a unit in the “To” and “From” fields enter all nine digits of the unit number to filter the search results and then select the appropriate account.
3. “To” and “From” amounts must net to zero.

Budget Center Training

What are my options for additional training?

There are two options for additional training:

- To receive training in a group setting [Register for Budget Center Training](#)
 - If you would prefer one-on-one training contact [Vicki Cooley](#)

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