



ILLINOIS STATE UNIVERSITY

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Budget Center

Vicki Cooley

Data Analyst, Budget Office



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- Introductions
 - Name, department, role at university
 - Do you use Cognos currently?
 - Is there anything specific you hope to get out of training?

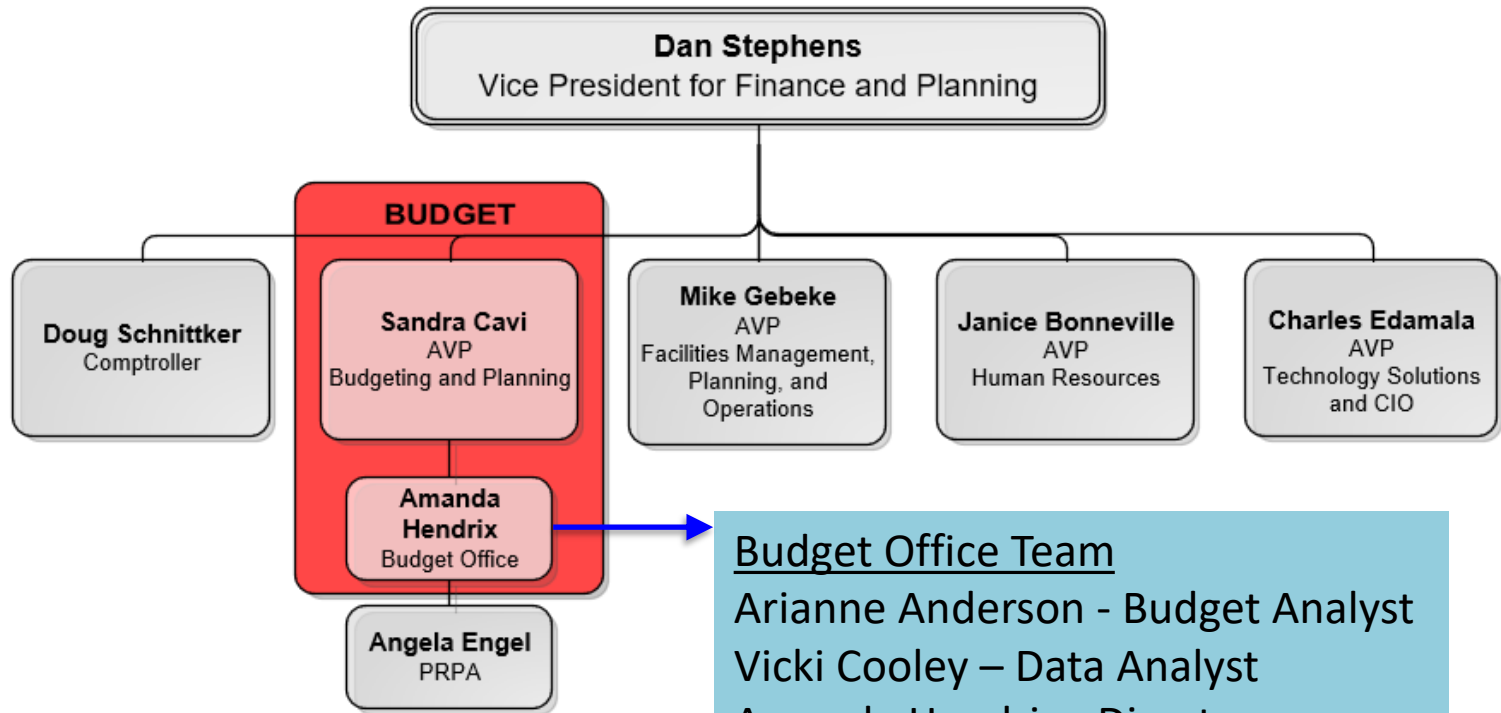


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Budget Office

- Who we are:



Budget Office Team

Arianne Anderson - Budget Analyst
Vicki Cooley – Data Analyst
Amanda Hendrix - Director
Janis Langdon – Asst Director



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Budget Center

- Cognos reports and dashboards
- Features:
 - Historical data back to 2015
 - Operating and Payroll data for all funds
 - Foundation data from Agresso
 - Ability to export data to Excel
 - Ability to set up report subscriptions
 - Dashboards/charts
- Ongoing training sessions offered – registration link on Budget.illinoisstate.edu

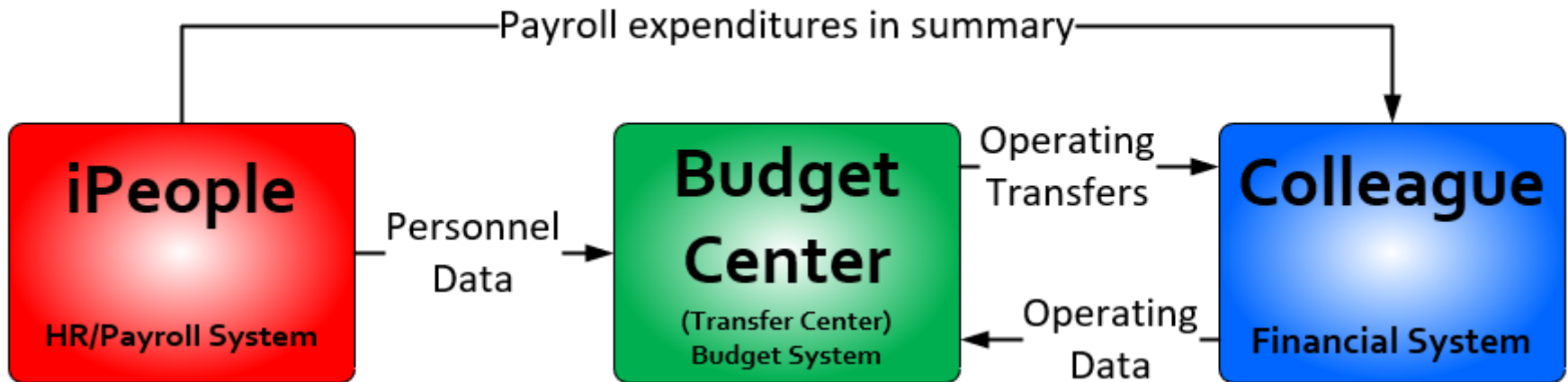


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Budget Office System Integration Diagram



*All data refreshed nightly

[Detailed integration diagram](#)



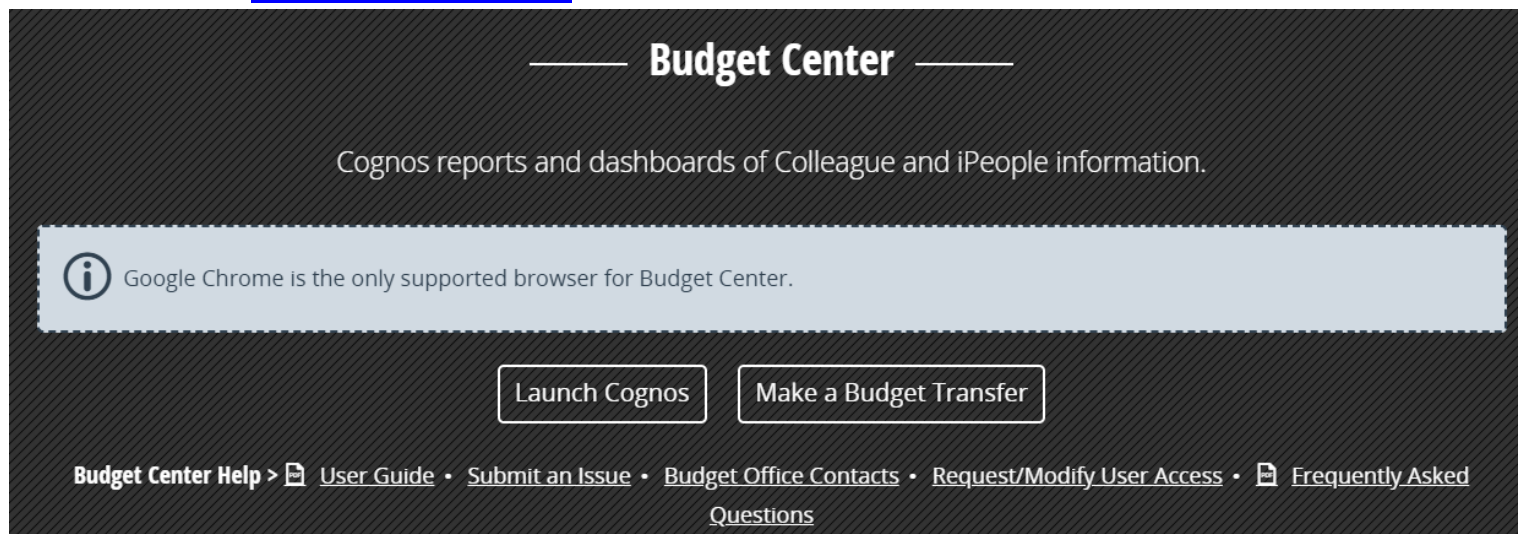
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Budget Center Access

NOTE: If off-campus, must be logged in to VPN. Use Google Chrome.

Access via [My Illinois State](#) → Fiscal Tab



OR

Can access directly at: <https://insight.illinoisstate.edu/>

OR

Budget Office homepage: <http://www.budget.illinoisstate.edu>



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- Demo Reports
 - GR top level
 - Operating budget/exp/enc/available
 - Personnel budget/exp/enc/available
 - GR All Details
 - Go through each tab
 - Show download to Excel
 - GR Unit Total Summary
 - Budget Transfer Details
 - Agency All Details (if applicable)
 - Show cash balance
 - Grants – expenditures by date range (if applicable)
 - Employee Position Funding (next slides)



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Employee Position Funding

Prompt Page

Provide values for the report you are about to run.

- * Indicates a required field.
- Points to missing information.

***Fiscal Year**

* Fiscal Year ▾

***Employee (Name or UID)**

* [Empty text area for Employee Name or UID]

[Select all](#) [Deselect all](#)



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Employee Position Funding

Prompt Page

Provide values for the report you are about to run.

✳ Indicates a required field.

- Points to missing information.

***Fiscal Year**

2022

Select Fiscal Year and Employee List Will Populate

***Employee (Name or UID)**



A screenshot of a web browser window displaying a list of items, each preceded by a checkbox. The browser's address bar shows a URL starting with "http://". The list contains 11 items, all of which are currently unchecked. The items are:

- ☐ Item 1
- ☐ Item 2
- ☐ Item 3
- ☐ Item 4
- ☐ Item 5
- ☐ Item 6
- ☐ Item 7
- ☐ Item 8
- ☐ Item 9
- ☐ Item 10
- ☐ Item 11

The browser window includes a standard address bar, a search bar, and a list of navigation links (Home, Back, Forward, Stop, Reload, Print, etc.). The page content is a simple list with checkboxes, and the browser's status bar at the bottom shows the page is loaded.

Select all Deselect all



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Employee Position Funding

Return to Prompt

Employee: [Redacted] - [Redacted] - [Redacted]

Effective Date	Position Number	Unit Code	Department	Employee Status	FTE	Rate	Compensation Frequency	Distribution %	Account Number	Distribution Rate
07-01-2021	[Redacted]	[Redacted]	[Redacted]	Active	1.00	[Redacted]	Monthly	100.000	[Redacted]	[Redacted]
01-01-2022	[Redacted]	[Redacted]	[Redacted]	Active	1.00	[Redacted]	Monthly	100.000	[Redacted]	[Redacted]
04-01-2022	[Redacted]	[Redacted]	[Redacted]	Active	1.00	[Redacted]	Monthly	100.000	[Redacted]	[Redacted]

Outstanding Additional Pays
None

Paid Additional Pays
None

Employee: [Redacted] - [Redacted] - [Redacted]

Effective Date	Position Number	Unit Code	Department	Employee Status	FTE	Rate	Compensation Frequency	Distribution %	Account Number	Distribution Rate
07-01-2021	[Redacted]	[Redacted]	[Redacted]	Active	0.25	[Redacted]	Monthly - 4.5 Months	100.000	[Redacted]	[Redacted]
01-01-2022	[Redacted]	[Redacted]	[Redacted]	Active	0.25	[Redacted]	Monthly - 4.5 Months	100.000	[Redacted]	[Redacted]

File Edit View

Primary position department users will see primary and secondary positions.
Secondary position department users will see only secondary position.



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- Demo dashboards
- Demo Technology (some will be repetitive)
 - News & Alerts
 - Run Button
 - Reggie head
 - Report subscriptions
 - Control F
 - Sorting within reports
- Demo Transfer Center (if applicable)



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Budget Center Tips

- If off-campus, must connect to VPN
- Must use Google Chrome
- When downloading to Excel, Use “Run Excel”
- Use Ctrl + F to find a specific unit, name, etc.
- Use “Reset dashboard”  button to reset dashboard filters



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Contacts and Resources

- Budget Office
 - Email: UniversityBudgetOffice@ilstu.edu
 - Website: Budget.illinoisstate.edu
- [Budget/Transfer Center User's Guide](#)
- [Frequently Asked Questions](#)
- [Cognos Resources and Budget Center report information](#)
- Monthly Cognos newsletters will be sent by Enterprise Data & Analytics (EDA)



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Questions



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