

Cognos – Running FI-Budget Status and Summary (Non-sponsored awards) Report User Guide

Recommended Browsers for use:

- *Firefox, Mozilla
- *Internet Explorer



Use this report for activity on Unrestricted Funds only!

Logon Process

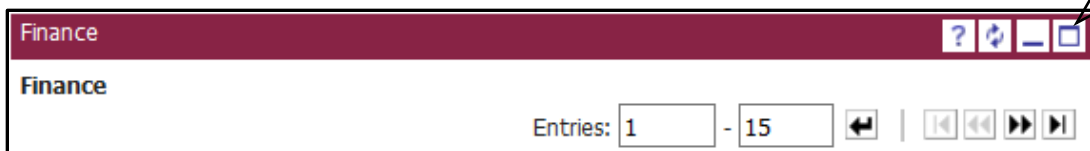
1. In the URL address bar type cognos-p.nmsu.edu.
2. At the logon screen, enter your my.NMSU **Username** and **Password**.
3. Several tabs may or may not be available across top of page; options based on security access.
4. Select tab, **Administrative and Finance**.
5. Select subtab **Administrative**.



Run Report as PDF and set as email for delivery

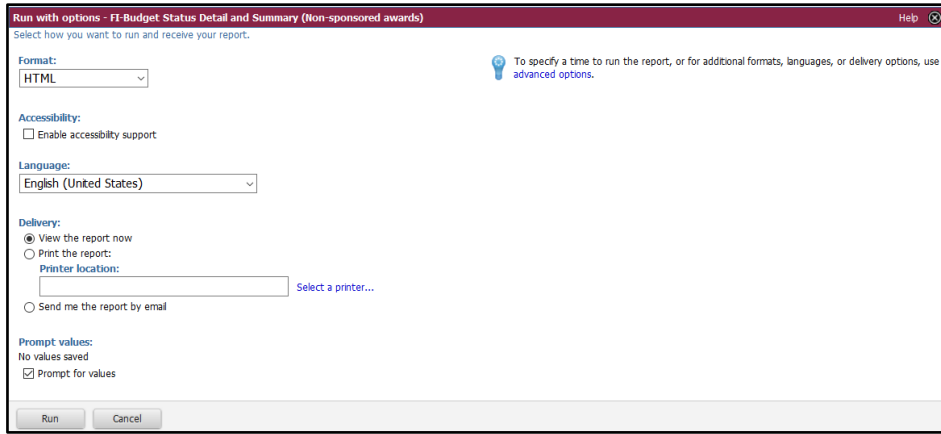
Set Report Parameters

The default format of the reports are in HTML. There are different report formats available but the recommended format for print would be PDF, follow steps below.

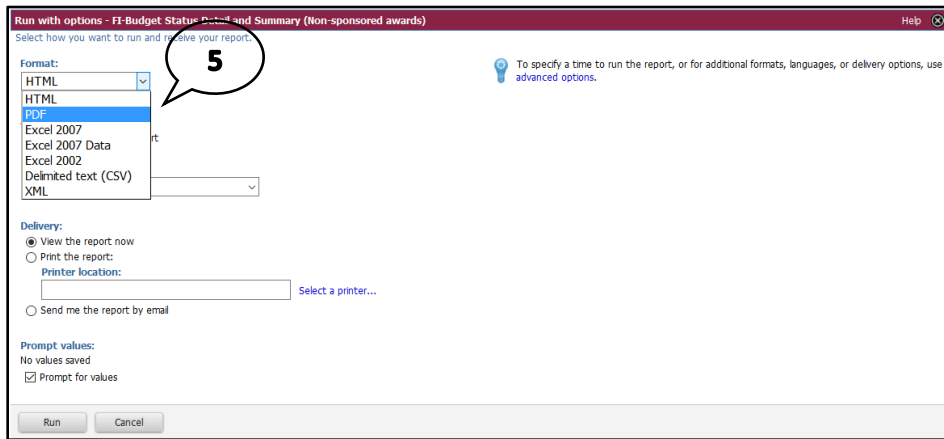
1. Locate the Finance portlet



2. On the upper right hand corner, locate the Maximize Finance  icon. This will expand the portlet.
3. With the Finance portlet expanded, all reports are visible. Locate the *FI-Budget Status Detail and Summary...* report. Look for the Run  icon. Click on the **Run** icon.
4. The Run with options screen is visible. As recommended for print best format is PDF.

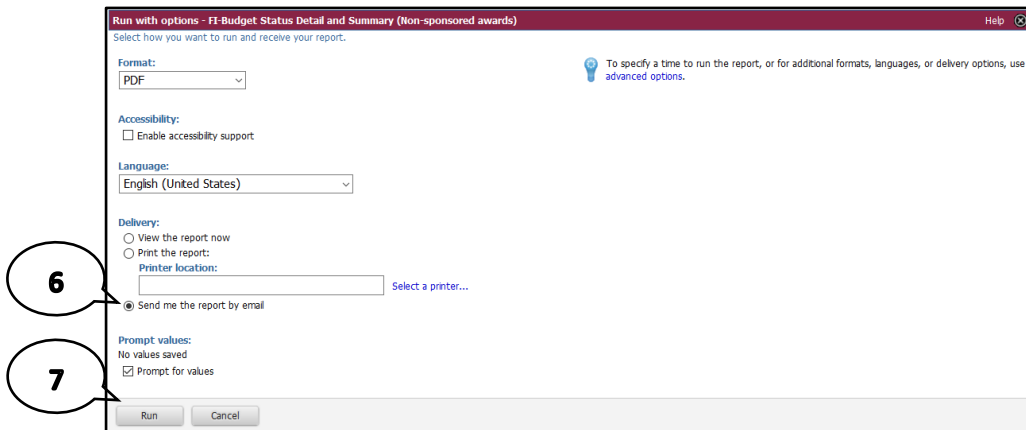


5. Locate Format and click on the **drop down arrow**. Change the format to **PDF**.



Note: From the drop down menu, other format options are available for selection, Excel etc.

6. Locate Delivery and select the **Send me the report to email** radio button.



7. With all parameters set, click on the **Run** button.

Set Report Prompt Pages

FI-Budget Status Detail and Summary (Non-sponsored awards) Prompt Page

Select Delivery Format

- Budget Status Summary (Eprint: ZAFGRBD)
- Budget Status Detail (Eprint: ZAFGRPD)
- Budget Status Summary & Detail

Cancel Next >

1. Select **radio** button for the desired deliver format.
2. Then click on the **Next** button.

FI-Budget Status Detail and Summary (Non-sponsored awards) Prompt Page

Enter 4 Digit Fiscal Year: **4**
Fiscal Year
(If left blank, the fiscal year will default to the fiscal year tied to the last closed fiscal period. However, selecting the fiscal year will improve performance.)

Enter 2 Digit Fiscal Period (14 for year end): **5**
Fiscal Period
(If left blank, the fiscal period will default to the last closed fiscal period. However, selecting the fiscal period will improve performance.)

***Filter By...** Organization Fund Index ***Show Filter Options**

Only include index in report if activity is found for fiscal period selected?
 Yes, only include index where activity is found for fiscal period selected (Note: if filtering by Index, you may not receive any results)
 No, include all indices, regardless of activity for the fiscal period selected

Include Termed Indices:
 No
 Yes

***Required**

Cancel < Back Additional Filter Options... Finish

3. An additional prompt page is available; select the required fields as stated.

Note: Review options available for best performance.

4. Select desired Fiscal year from the drop down menu.
5. Select desired 2 Digit Fiscal Period (months within the fiscal year) from the drop down menu.

FI-Budget Status Detail and Summary (Non-sponsored awards) Prompt Page

Enter 4 Digit Fiscal Year: (If left blank, the fiscal year will default to the fiscal year tied to the last closed fiscal period. **However, selecting the fiscal year will improve performance.**)

Enter 2 Digit Fiscal Period (14 for year-end): (If left blank, the fiscal period will default to the last closed fiscal period. **However, selecting the fiscal period will improve performance.**)

***Filter By...** Organization Fund Index ***Show Filter Options**

Only include index in report if activity is found for fiscal period selected?
 Yes, only include index where activity is found for fiscal period selected (Note: if filtering by Index, you may not receive any results)
 No, include all indices, regardless of activity for the fiscal period selected

Include Termed Indices:
 No
 Yes

***Required**

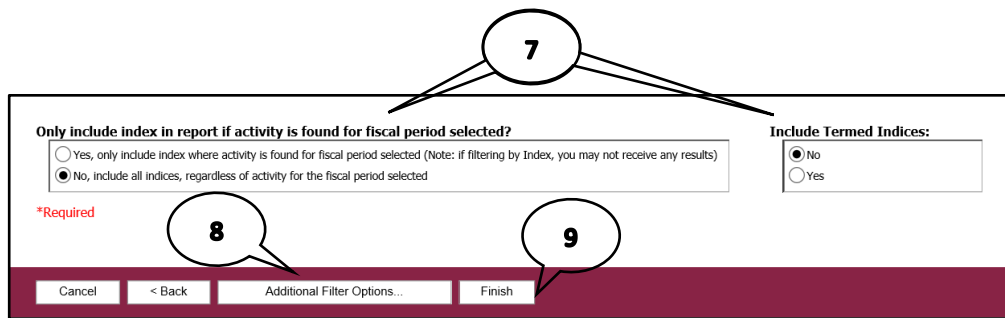
Cancel < Back Additional Filter Options... Finish

6. Based on the selection for “Filter By...” additional options will be available to input.
 - a. If you select:
 - i. Organization, click on “**Show Filter Options**” button – The display shows a summary of organizations in the dropdown menu. Select the desired “Summary Organization” and then click on the **Show Depts** button. Select one or more departments from the display list.
 - ii. Fund click on “**Show Filter Options**” button – The display shows an “Enter Fund” field. Input the Fund number in the blank field. Click on the **Insert** button to move it over under “Choices”. Multiple funds are accepted.

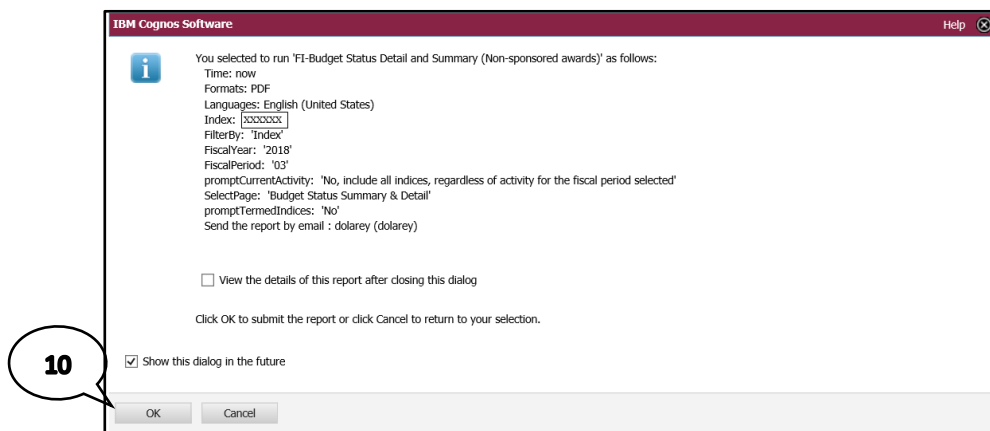
Note: To remove, highlight the fund number and then click on the **Remove** button.

- iii. Index click on “**Show Filter Options**” button – The display shows an “Enter Index. Input the Index in the blank field. Click on the **Insert** button to move over under “Choices”. Multiple indices are accepted.

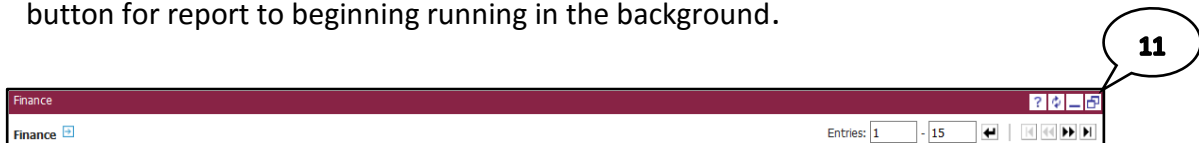
Note: To remove, highlight the Index number and then click on the **Remove** button.




7. Review other options listed and change if applicable or leave at default.
8. An “Additional Filter Options...”button is available for use, with the selection of Organization (multiple Indices are available if applicable) or Fund (more Fund types available).
9. Click on the **Finish** button



10. A prompt page display is visible (allows for view of prompt criteria selection). Click **OK** button for report to beginning running in the background.



11. With the Finance portlet displayed, restore portlet view by clicking on the  restore icon.
12. Close Cognos by using **Log Off** link.

Note: Email address recipient receives report results.