

Budget Conversation April 18, 2022

Topic: Cognos updates and BRP's web based reports

Cognos update: Travis Shea

Short update on progress and the plan with the effort on Banner reporting migrating into Cognos tool

- Planning for vast majority of reports to have same behavior as now when you interact with Banner to look at reports which sends you to Excel or PDF version.
- Experience will be the same, just will be in Cognos behind the scenes to serve up the report, without having to go into Cognos to run reports.
- Reports will be feeding off live Banner data so timely same as before.
- A few reports will be migrating over to Cognos system, mainly for internal small user teams, e.g. Payroll, Registrar's internal reports.
- Anyone without current Cognos account, an account will be created for you behind the scenes with no requesting required.
- Going forward will be part of the Banner request process, get Banner account and Cognos account for reporting.

Timeline Plan

- Continue to migrate thru spring into summer, with tentative go live date in August,
- end of August old technology will no longer be supported by Oracle,
- soft deadline as can continue to use old technology past August, just won't get security updates.
- Progress is going well as now settled on how experience will continue for people.
- Will be formal communications with more details. Might be opportunity to see reports before August, if so will communicate to different groups to get feedback.
- Slowly replace reports over time, instead of all in one night in August.

Question:

Is there a way to get copy of JV with text in Cognos? Duckweb used to have a JV print option with text and that has changed and no longer provide the doc text. How can we get same doc view in Cognos? This isn't a Banner but a Duckweb but hoping for good reports in Cognos.

Answer:

Duckweb JV works you just have to tell it sequence zero to get JV to work properly. That is for Deckweb print option. It does look different as different platform but same content. Duckweb will go thru upgrade as well, might be coming over to Cognos, haven't heard from the team managing that piece, will have to confirm.

BRP web based budget reports: Stuart Laing

Today talking about Budget Reports that are out on a monthly basis and how to use those reports

- Useful if a unit needs budget change history or increases over the years, you don't have to contact BRP
- Comes right out of Cognos report data
- Usually takes a week after period close to get reports posted.
- Can check what changes are happening, 99% time reports show perm as positive and temp budget is negative, this is salary increases coming thru
- Check carry forward amount

Reports on BRP web page - <https://brp.uoregon.edu> > Reports

- BOT Expense Authority
 - Tells university that you can expend \$1B, without authorization from BOT we wouldn't be able to spend a nickel.
 - Without authorization we wouldn't be able to start a FY so it behooves the university and BRP to work with BOT and the CFO to get proper expense authority.
 - For FY July 2023, we are finalizing this week.
 - Those that have helped Janine over the last couple weeks and months, thank you.
- Expenditure Budget Reports
 - Operational expense budget report that shows that period 1 is beginning budget and period 2 has carry forward, and so on, published on a monthly basis after each period close.
 - Pivot Table is useful for quick analysis as shows budget changes throughout year, carry forward and temp changes.
 - The "External Reports" do not require a FIS user log-in as the reports give you FOPAL elements, not index.
 - Excluded are sponsored grants, plant funds or agency funds as we don't budget for these
 - Reports are only expense budgets on general fund, ICC, designated ops, auxiliary, service centers and gift funds.
 - External Reports are Level 3 budget
 - You can add account code to pivot table and see all of data downloaded
 - does not have index or doc description
 - reports for several fiscal years are available, these do not change after period close even if Banner changes. If you rename a unit today, Banner will reflect those changes as if it was since Banner implemented. We leave finished reports as is so you can see how that particular year was for a unit, etc
- Detailed Expenditure Budget Reports for FIS users
 - highly recommend to use
 - The "Internal Reports" require a FIS user log-in as behind the firewall, required as show index names
 - data is protected as it includes everything - index you paid a bill on, description of budget change processed, so if putting budget on gift fund you would see it on this report for the FY
 - Pivot Table can be used to get data to show
 - by Level 2, 3 or 4, etc
 - activity code and all FOPAL elements
 - doc description and date
 - if you moved money during year