Common
CFS Financial
System

California State University, Chico

Insight Reporting Service

Accessing Reports

Business Process Guide

Direct questions to Financial Accounting and Reporting, x5103

Access Insight Reporting

Internet Explorer is the preferred browser, however, Chrome, Safari and Firefox can also be used.
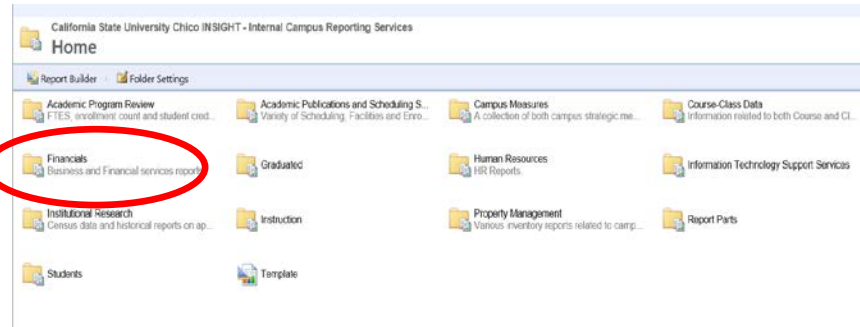
- Type **//Insight** in the browser URL and press the Enter key.

- Enter **Username** and **Password** on the Login page.

- Click **OK**.

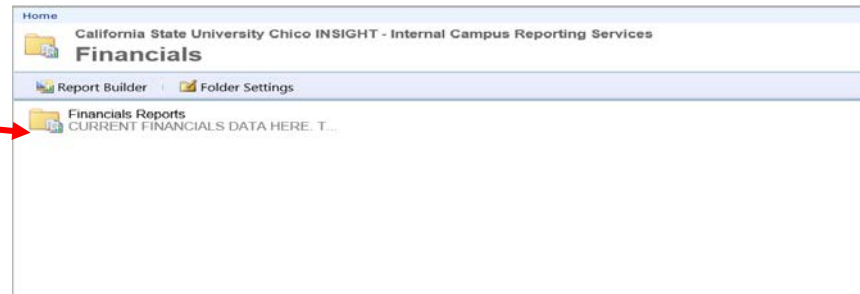*Note: Username and Password are the same as the Domain.*
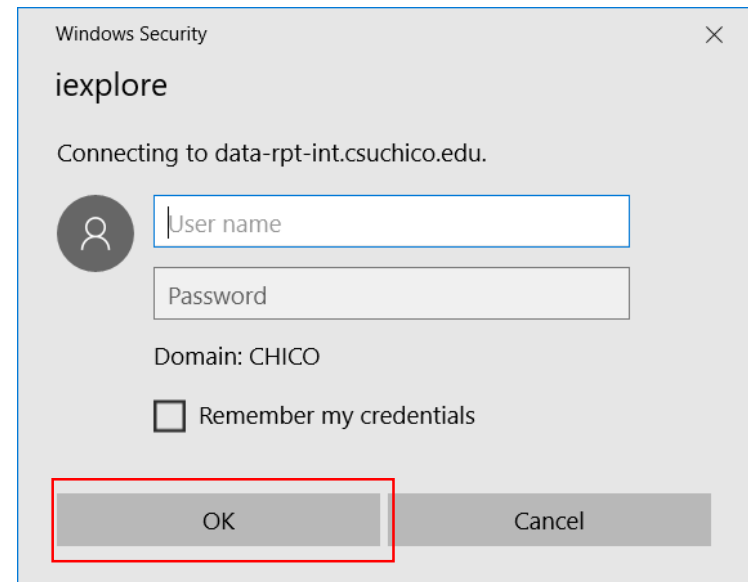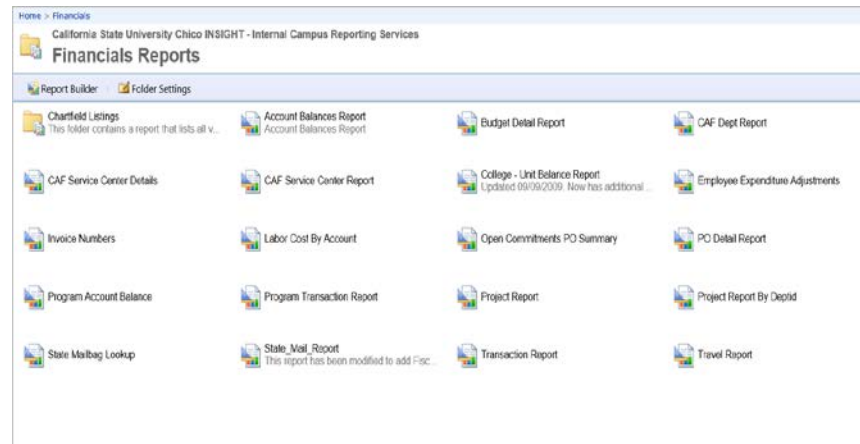
Access Insight Reporting (cont.)

- Open the **Financials** folder.

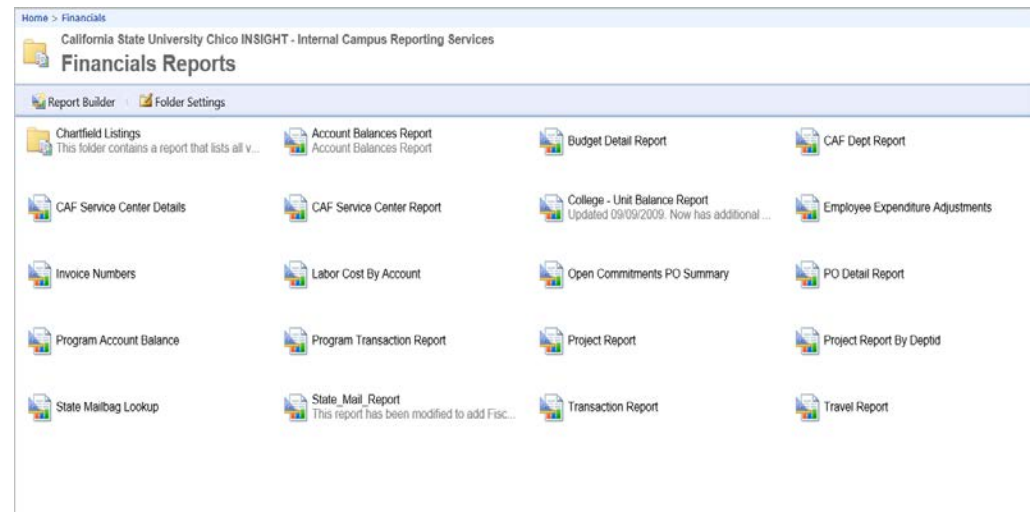- Click the **Financials Reports** to open the folder.

- Click the financial report you would like to process.

Access Insight Reporting (cont.)

- Click the report to be processed.

Setting Report Parameters

- Once a report is open, use the down arrow to open the box and select parameters for each category. The categories will vary with the report selected.

Note: When setting the Deptid parameter there are two options:

- Select from the list;

OR

- Select N/A and select the Deptid.

Processing a Report & Accessing Results

Process a Report

- Once the parameters have been selected, click the **View Report** button to process the report.

Results

- The first page of the results will display below the parameters.

- The page number and number of pages in the report are listed on the left side of the tool bar.

- Use the ⏮ ◀ ▶ ⏭ arrows to move through the report.

Account Balances Report

| D02200 STAFF DEVELOPMENT | | | | | Manager: STIVERS,ROBBI |

G1006 CSU OPERATING FUND

Account	Account Ldesc	Budget	Encumbered	Actual	Balance
601300	Support Staff Salaries	16,068.00	0.00	723.06	15,344.94
		16,068.00	0.00	723.06	15,344.94

| D02300 PAYROLL SERVICES | | | | | Manager: CAGLE,REBECCA |

G1006 CSU OPERATING FUND

Account	Account Ldesc	Budget	Encumbered	Actual	Balance
601201	Management And Supervisory	118,080.00	0.00	30,406.50	87,673.50
601300	Support Staff Salaries	128,371.00	0.00	35,292.91	93,078.09
601301	Overtime	0.00	0.00	177.92	-177.92
		246,451.00	0.00	65,877.33	180,573.67

| D02301 HUMAN RESOURCES INFO SYSTEMS | | | | | Manager: CAGLE,REBECCA |

G1006 CSU OPERATING FUND

Account	Account Ldesc	Budget	Encumbered	Actual	Balance
601300	Support Staff Salaries	163,510.00	0.00	40,875.00	122,635.00
		163,510.00	0.00	40,875.00	122,635.00

| D02400 HUMAN RESOURCES SERVICE CENTER | | | | | Manager: WOODWARD,SHERYL |

G1006 CSU OPERATING FUND

Account	Account Ldesc	Budget	Encumbered	Actual	Balance
601201	Management And Supervisory	474,852.00	0.00	122,277.00	352,575.00

Searching the Results

Use the ⬚ Find | Next box to search the report for specific information.

Account Balances Report screen

Navigation path: Home > Financials > Financials Reports > Account Balances Report

Toolbar: page 1 of 2 ?, 100%, search box: 601301, Find | Next

Account Balances Report

D02200 STAFF DEVELOPMENT

Type specific information in the box and click Find.

G1006 CSU OPERATING FUND

Account	Account Ldesc	Budget	Encumbered	Actual	Balance
601300	Support Staff Salaries	16,068.00	0.00	723.06	15,344.94
		16,068.00	0.00	723.06	15,344.94

D02300 PAYROLL SERVICES — Manager: CAGLE,REBECCA

G1006 CSU OPERATING FUND

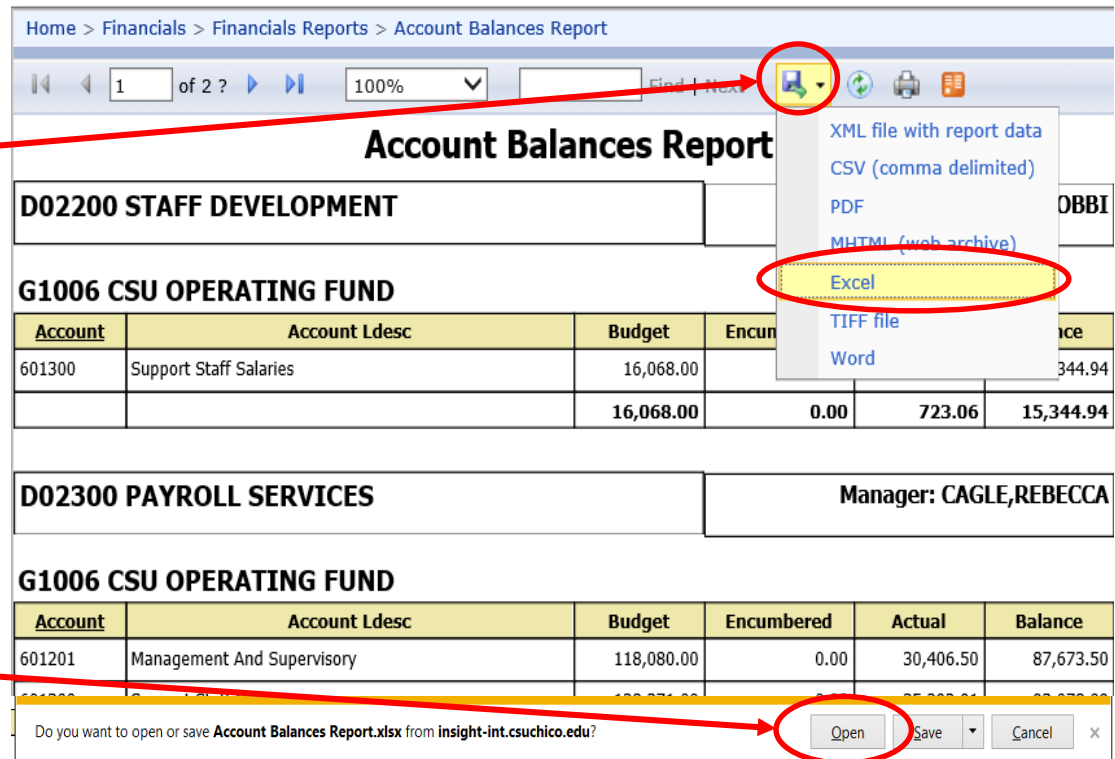| Account	Account Ldesc	Budget	Encumbered	Actual	Balance
601201	Management And Supervisory	118,080.00	0.00	30,406.50	87,673.50
601300	Support Staff Salaries	128,371.00	0.00	35,292.91	93,078.09
601301	Overtime	0.00	0.00	177.92	-177.92
		246,451.00	0.00	65,877.33	180,573.67

If the information is contained in the report it will be located and highlighted. Click Next to find other occurrences.

D02301 HUMAN RESOURCES — Manager: ...CCA

G1006 CSU OPERATING FUND

Account	Account Ldesc	Budget	Encumbered	Actual	Balance
601300	Support Staff Salaries	163,510.00	0.00	40,875.00	122,635.00
		163,510.00	0.00	40,875.00	122,635.00

D02400 HUMAN RESOURCES SERVICE CENTER — Manager: WOODWARD,SHERYL

G1006 CSU OPERATING FUND

Account	Account Ldesc	Budget	Encumbered	Actual	Balance
601201	Management And Supervisory	474,852.00	0.00	122,277.00	352,575.00

Exporting to Excel

- Click the ![save icon] down arrow in the **Save As** box.

- Select **Excel**.

- Click **Open**.

Exporting to Excel (cont.)

- An Excel document will open containing the information from the Insight report.

Printing a Report

- Do not use the printer icon in Insight to print the document.

- Use the **File** button on the Excel Worksheet to access the print function.

- Select **Print**.