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1. Research Reporting – Administrators

The data used in these reports is downloaded into Cognos from the University Finance System overnight. Therefore, transactions and balances will be as at the end of the previous working day.

The majority of Grants reports are available from the Departmental Shared folder for users that have been given access to the Grants folder in Cognos.

\[ E.g. \] Public Folders > LIVE > School > Departmental (Shared) Reports > Grants Reporting

These can broadly be attributed into the following categories.

**Summary financial reports – cumulative project to date**
- Projects by Organisation by PI
- Grants by Sponsor Type
- Research Council Statement School/Department version
- Project Enquiry

**Summary reports for specific date ranges**
- Project Enquiry
- Grant Actual Expenditure by Project Organisation
- Top Slice Postings
- Grant Expenditure by Month
- Year-end grant report by Project Organisation

**Detailed listing of expenditure**
- Detailed Expenditure Enquiry by Project
- Payroll Costs

**Grants approaching their end dates**
- FES List
- Grants Ended Enquiry Details
- 3-2-1 Grants Listing

All of the reports can be run in HTML, PDF, Excel 2007, Excel 2002, Excel 2000 single sheet, CSV, XML formats. They can also be distributed by email.

**What is a project/award organisation?**

These are set up in the grants module, and mapped to cost centres in the GL. Usually a department has a single project organisation, so it’s a one-to-one mapping, but it’s quite possible for a department to have multiple project organisations, and several departments have this set up (e.g. Chemistry, Engineering, CRUK CI, MRC Epidemiology).

When an award is set up by the Research Operations Office (ROO), the administrator selects the organisation. It is set at the project level (the ‘project org’), and an organisation is also set at the award level (the ‘award org’). The project org determines which GL cost centre expenditure on the project maps to in M Source of Funds.

Usually a project org will be the same as the award org. They’d only be different if, say, a Physics award has one project in Physics and another in DAMPT. This can be changed during the life of the grant for example at year end for department mergers and movements.
2. **Computer Settings for Cognos Users**

- If you use a PC, Internet Explorer is the preferred browser however, Firefox 3.6 can be used. COGNOS does not work with Safari.

- Pop ups and Java Script should be enabled.

- You need to make the following URL a trusted site: https://admin-reporting.cam.ac.uk

- To do this in Internet Explorer:
  - Go to the menu tool bar and select **Tools > Internet Options**
  - Click on the **Security** tab, click on the **Trusted sites** green tick and click on the **Sites** button.
  - Check the URL is in the list.
  - If not you'll need to add it by pasting the URL in the **Add this website to the zone** text box and click on the **Add** button.
  - You will need to re-boot your machine after doing this.
To enable PI Reports (drill down)

To enable drill down reports Java script must be enabled in Adobe.

- Open Adobe and from the menu bar select Edit>preferences
- Tick the box at the top to Enable Acrobat Java script.

You may find if using Adobe reader 9 you have to do this each time your computer is rebooted.

MAC users

If you are a Mac user you will need to access Cognos using Firefox 3.6, with pop-ups and java script enabled. Please contact your departmental computer officer for further information.

Signing into COGNOS

You will need a Raven password, see https://raven.cam.ac.uk/

Open your web browser and navigate to the Admin Reporting home page:

http://www.admin-reporting.cam.ac.uk/

- Click on the Cognos Login link to open the Admin Reporting Page.
- Click on the link Log in to Cognos now to open the Raven Authentication page.
- In the User ID field, enter your CRSID.
- In the password field, enter your Raven password.
- Click the submit button to enter the Cognos Welcome page (you will be required to re-enter your Raven password).

Signing out of Cognos

From any of the Cognos pages, click on the Log Off link at the top of the page and Close your browser window.

For further guidance on running reports please contact the Reporting Help Desk.

Email: FSG.System.Support@admin.cam.ac.uk
Website: http://www.admin-reporting.cam.ac.uk/cam-only/training/
3. Finding the Grants Reports

Once you have logged into COGNOS the Public Folder page will be the default home page.

Home

Once you have logged in the Public Folders page will display as per the screen shot below.

There are various icons on this page, which will assist you when navigating COGNOS.

<table>
<thead>
<tr>
<th>The Icon</th>
<th>The Name</th>
<th>The function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>My Area</td>
<td>Enables you to set up output preferences and review any reports you have scheduled. Refer to separate guidance.</td>
</tr>
<tr>
<td></td>
<td>Home</td>
<td>Displays the page you set as your Home page</td>
</tr>
</tbody>
</table>

It is important to ensure you have the right access to be able to use the system to its full potential. You will have access to either the Grants folder, General Ledger folder or both depending on what you specified on the form.
Grants Folder

The standard Grants reports are available from the Departmental Shared folder.

Public Folders > LIVE > Schools > Departmental (Shared) Reports > Grants Reporting

The following is a list of standard Grants reports that you should see regardless of which school you are in by using the navigation path above.

---

This icon indicates your output preference, which can be changed via ‘My Area, My Preferences’.

If you are unable to view folders, the list of Departmental (shared) reports for your school then please contact FSG.System.Support@admin.cam.ac.uk and ask them to check your set up.
4. **The Actions Buttons**

Against each report will be a list of available actions that can be carried out against it. The Actions listed against the report are dependent on how the report has been created and saved by the author (COGNOS reporting team).

<table>
<thead>
<tr>
<th>The Icon</th>
<th>The Name</th>
<th>The function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Run With Options</td>
<td>Allows you to run the report, specify the output and input parameters. Advanced option enables you to run it a specified time.</td>
</tr>
<tr>
<td></td>
<td>Report output versions</td>
<td>View historic versions</td>
</tr>
<tr>
<td></td>
<td>Schedule</td>
<td>Enables you to schedule reports to run on a regular basis</td>
</tr>
<tr>
<td></td>
<td>More</td>
<td>Provides the following functions.</td>
</tr>
</tbody>
</table>

- **Available actions:**
  - Set properties
  - View report output versions
  - View my permissions...
  - Run with options...
  - View the schedule
  - Alert me about new versions
  - Copy...
  - Create a shortcut to this entry...
  - Add to bookmarks...
  - Cancel
5. Running Reports

Running a Report

Once you have located the report you wish to run, click on the blue arrow to the right of the screen under Options.

A Run with options screen displays which is where you can set the format and whether you wish to view the report, print the report or have it emailed to you.

Please Note! If you click on the report name to run it, you bypass the Run options, therefore it is always recommended that you click on the Blue Arrow.

All of the reports can be run in HTML, PDF, Excel 2007, Excel 2002, Excel 2000 single sheet, CSV, XML formats and be distributed by email.

By clicking Run, the parameters for the relevant report selected will display for you to complete.
Running a PDF report or to screen

If you have indicated to run a report to PDF, the following icons towards the top right of the screen will be useful:

<table>
<thead>
<tr>
<th>The Icon</th>
<th>The function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Returns you to the list of reports.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Enables you to quickly run the same report with different parameters.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>This drop down list enables to view your report in other formats (refer to section on Viewing in Excel on page 12).</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>This icon enables the report to be added to <em>My Folders</em> or <em>Add to Bookmarks</em> (refer to separate guidance).</td>
</tr>
</tbody>
</table>
6. Converting a PDF Report to Excel

If you have run a report and reviewed the data and decided that it would be better in Excel, then instead of running the whole report again, you can easily convert it from PDF to Excel.

1. Once the report has run and the PDF is displayed, click on the View in PDF icon.

2. Click View in Excel Options and then select the relevant option.

3. A pop up message will display giving the option to Open or Save As. Click Open.

4. An excel page will open with the report contents.
7. Summary Financial Reports – cumulative project to date

Projects by Organisation by PI

This is a useful summary report that could be given out to individual PIs. The report returns the following data, with cumulative project-to-date totals. There will be a separate page for each PI.

Run options

These include:

- by Project Organisation or multiples – if you select a project organisation but no data is returned then this means that there are no open projects on that organisation.
- by PI or multiples.
Projects by PI

Current School Structure
- Associated Bodies
- NSI
- Others
- School of Arts and Humanities
- School of Clinical Medicine
- School of Technology
- School of the Biological Sciences
- School of the Humanities and Social Sciences
- School of the Physical Sciences
- UAS

Project Organization
- PD Plant Sciences
  - PE_Cambridge University Botanic Garden
  - PF_Zoology
    - PF_Zoology - Animal Physiology
    - PF_Zoology - Behavior and Behavioural Neurosciences
    - PF_Zoology - Behavioural Ecology
    - PF_Zoology - Cell Biology
    - PF_Zoology - Developmental Biology
    - PF_Zoology - Evolution and Diversity Research Group
    - PF_Zoology - Museum and Molecular Studies
    - PF_Zoology - Neurobiology

Project PI Name
- Unknown
- ABELL, Professor Chris
- ALLWOOD, Dr Julian
- ASHBY, Doctor AM
- BALK, Dr Janneke
- BAULCOMBE, Professor DC
- BOWTELL, Mr. Michael
- BREARLEY, Doctor CA
- BROCKINGTON, Doctor Samuel
- BUTLER, Mrs. Catherine
- CARMICHAEL, Doctor William

Select all Deselect all

Cancel  < Back  Next >  Finish
Grants by Sponsor Type (Transactional DB)

This can be run for either a single or multiple departments (dependent on access) and optionally:
- single or multiple sponsor types
- single or multiple award statuses
- single or multiple sponsors.

The report returns the following information, excluding commitments and budget.

Example header details

Grants by Sponsor type

<table>
<thead>
<tr>
<th>GL Department Code</th>
<th>Award Organization</th>
<th>Sponsor Type</th>
<th>Award Number</th>
<th>Award Title</th>
<th>Project Short Code</th>
<th>Award PI Name</th>
<th>Expenditure</th>
</tr>
</thead>
</table>

Grants by Sponsor Type (with Budget)

This can be run for either a single or multiple departments (dependent on access) and optionally:
- single or multiple sponsor types
- single or multiple award statuses
- single or multiple sponsors.

The report returns the following information, excluding commitments.

Grants by Sponsor Type

<table>
<thead>
<tr>
<th>Award Organization</th>
<th>Sponsor Type</th>
<th>Award Number</th>
<th>Award Title</th>
<th>Project Short Code</th>
<th>Award PI Name</th>
<th>Budget</th>
<th>Expenditure</th>
</tr>
</thead>
</table>

7-Dec-16
Version 10.0
Page 15 of 53
Run Options for both reports
Research Council Statement

This report provides administrators with a listing of all the different types of Research Council Grants that are held within their department.

### Research Council Grants

<table>
<thead>
<tr>
<th>Award Number</th>
<th>Project Short Code</th>
<th>Sponsor Type</th>
<th>Award Organisation</th>
<th>Award PI Name</th>
<th>Award Start Date</th>
<th>Award End Date</th>
<th>Award Status</th>
<th>Funding Ref</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>RG45774</td>
<td>ZZAG160</td>
<td>RESEARCH COUNCIL - BBSRC</td>
<td>ZZ_Ecology</td>
<td>DARWIN, Professor C</td>
<td>1 Apr 2007</td>
<td>31 Mar 2012</td>
<td>ACTIVE</td>
<td>BB/ ES27163/1</td>
<td>704,361.50</td>
</tr>
<tr>
<td>RG45774</td>
<td>ZZAG22</td>
<td>RESEARCH COUNCIL - BBSRC</td>
<td>ZZ_Ecology</td>
<td>SMITH, Dr AG</td>
<td>1 Oct 2006</td>
<td>30 Sep 2012</td>
<td>ACTIVE</td>
<td>BB/ ES25110/1</td>
<td>650,664.00</td>
</tr>
<tr>
<td>RG46708</td>
<td>ZZAD22</td>
<td>RESEARCH COUNCIL - NERC</td>
<td>ZZ_Ecology</td>
<td>DAWKINS, Dr Richard</td>
<td>1 Oct 2008</td>
<td>30 Sep 2012</td>
<td>ACTIVE</td>
<td>NI/ GS2441X/</td>
<td>82,624.90</td>
</tr>
</tbody>
</table>

### Run options

- Single or multiple Award Organisation
Project Enquiry

A summary of actual burdened costs per task, analysed by both Expenditure Category and Expenditure Type (the same information as the Award Status Enquiry screen in CUFS).

### Project Enquiry

<table>
<thead>
<tr>
<th>Task Number</th>
<th>Task Name</th>
<th>Expenditure Category</th>
<th>Expenditure Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>000001</td>
<td>DIRECT COSTS</td>
<td>EQUIPMENT</td>
<td>COMPUTING COSTS</td>
<td>1,092.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>EQUIPMENT</td>
<td>41,408.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OTHER COSTS</td>
<td>OTHER COSTS/CONSUMABLES</td>
<td>89,955.88</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>OTHER COSTS/MISCELLANEOUS</td>
<td>77,404.80</td>
</tr>
<tr>
<td></td>
<td></td>
<td>STAFF COSTS</td>
<td>STIPENDS</td>
<td>259,401.01</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>WAGES</td>
<td>179,192.74</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TRAVEL AND SUBSISTENCE</td>
<td>TRAVEL/FOREIGN</td>
<td>0.00</td>
</tr>
<tr>
<td>000001</td>
<td></td>
<td></td>
<td></td>
<td>648,454.52</td>
</tr>
<tr>
<td>001100</td>
<td>NON DIRECT COSTS</td>
<td>ESTATES COSTS</td>
<td>ESTATES COSTS - CHEST</td>
<td>44,338.68</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>ESTATES COSTS - DEPT</td>
<td>8,867.73</td>
</tr>
<tr>
<td></td>
<td></td>
<td>INDIRECT COSTS</td>
<td>INDIRECT COSTS - CHEST</td>
<td>161,121.46</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>INDIRECT COSTS - DEPT</td>
<td>32,224.29</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UNIVERSITY FUNDED</td>
<td>UNIVERSITY FUNDED - CHEST</td>
<td>(41,092.03)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>UNIVERSITY FUNDED - DEPT</td>
<td>(8,218.40)</td>
</tr>
<tr>
<td>001100</td>
<td></td>
<td></td>
<td></td>
<td>197,241.73</td>
</tr>
<tr>
<td>Summary</td>
<td></td>
<td></td>
<td></td>
<td>845,896.25</td>
</tr>
</tbody>
</table>

**Run options**

- Can be run for either a single project or multi projects – if ran for multi projects then data for all projects will be consolidated into just one summary and a list of the projects included will be displayed at the top of the report.

**Project Enquiry**

ZZAG/115, ZZAG/119

<table>
<thead>
<tr>
<th>Task Number</th>
<th>Task Name</th>
<th>Expenditure Category</th>
<th>Expenditure Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>000001</td>
<td>DIRECT COSTS</td>
<td>EQUIPMENT</td>
<td>COMPUTING COSTS</td>
<td>1,092.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>EQUIPMENT</td>
<td></td>
</tr>
</tbody>
</table>

- Can be run for all costs on the project to date (as in the example above) or a particular date range specified.

**Project Enquiry**

ZZAG/115
Between 1 Oct 2012 and 31 Oct 2012
### Project Enquiry Parameters

Pick School, Project organisations will automatically populate:
- School of the Biological Sciences

Pick Project Organisation, Project Short codes will automatically populate:
- PD_Plant Sciences

Pick Project short code or multiples:
- PDAG/162
- PDAG/163
- PDAG/165
- PDAG/166
- PDAG/167
- PDAG/168
- PDAG/169
- PDAG/170
- PDAG/171
- PDAG/172
- PDAG/173

**Select all Deselect all**

**Pick date range**

**From:**

- **2013**
- **Jan**
- **Aug**
- **Mon**
- **1**
- **2**
- **3**
- **4**
- **5**
- **6**
- **7**
- **8**
- **9**
- **10**
- **11**
- **12**
- **13**
- **14**
- **15**
- **16**
- **17**
- **18**
- **19**
- **20**
- **21**
- **22**
- **23**
- **24**
- **25**
- **26**
- **27**
- **28**
- **29**
- **30**
- **31**

**Earliest date**

**To:**

- **2013**
- **Jan**
- **Aug**
- **Mon**
- **1**
- **2**
- **3**
- **4**
- **5**
- **6**
- **7**
- **8**
- **9**
- **10**
- **11**
- **12**
- **13**
- **14**
- **15**
- **16**
- **17**
- **18**
- **19**
- **20**
- **21**
- **22**
- **23**
- **24**
- **25**
- **26**
- **27**
- **28**
- **29**
- **30**
- **31**

**Latest date**

**Cancel**  **< Back**  **Next >**  **Finish**
8. Summary Reports for a specific date range

Grant Expenditure by Month

This can be run for a single grant or multiple grants, using the RG number and a specific date range. The report returns each grant details on separate page, with total expenditure for month excluding PO commitments.

Parameters

Example of report

Example:

<table>
<thead>
<tr>
<th>Award Number</th>
<th>Award Title</th>
<th>Sponsor Name</th>
<th>GL Period Name</th>
<th>Expenditure Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>RG12345</td>
<td>Research</td>
<td>Smith Industries</td>
<td>MAR-09</td>
<td>110.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>MAY-09</td>
<td>2,661.59</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>JUN-09</td>
<td>5,222.27</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>JUL-09</td>
<td>10,262.53</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>AUG-09</td>
<td>10,789.90</td>
</tr>
</tbody>
</table>
Grants Actual Expenditure by Project Organisation

This report uses charts as well as tables to display summary information relating to expenditure by type and by sponsor. It can be run across either a single or range of project organisations and for a specified date range.

The report is formatted into three sections:

Section 1  Actual Expenditure by Expenditure Type (pie chart and tabular format)
Section 2  Actual Expenditure by Sponsor Type (pie chart and in tabular format)
Section 3  Combined expenditure by sponsor type by expenditure category (tabular format only)

ZZ_Ecology

Grand Total
Run Options

- Enter your Department code in the search field
- Select the required Project Organisation(s) from the results box and insert them into the Choices box
- Enter the dates you wish the report to cover
Grants Actual Expenditure by Project Organisation - Report Options

Enter Project Organisation. Please select all relevant codes

Keywords:
Type one or more keywords separated by spaces.

Options: Search

Results:
ZZ_Ecology

Options: Insert Remove

Choose:
ZZ_Ecology

Select all Deselect all

Please enter report start date

Choose dates from the calendar.

Please enter report end date

Choose dates from the calendar.

Cancel  < Back  Next  >  Finish
Top Slice Postings

This report shows transactions that have been posted by Research Accounting to the award expenditure type ‘Top Slice’ for a specified period. These items are required to be posted to awards funded by Research Councils.

<table>
<thead>
<tr>
<th>Award Number</th>
<th>Project Short Code</th>
<th>Task Number</th>
<th>GL Period Name</th>
<th>Amount</th>
<th>Expenditure Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>RO12345</td>
<td>ZZZA/003</td>
<td>3</td>
<td>MAR-13</td>
<td>1,386.22</td>
<td>Top slice 2013 subcont reversal</td>
</tr>
<tr>
<td>ZZZA/003</td>
<td>ZZZA/003</td>
<td>3</td>
<td>MAR-13</td>
<td>1,755.94</td>
<td>Top slice 2014 subcont reversal</td>
</tr>
<tr>
<td>ZZZA/003</td>
<td>ZZZA/003</td>
<td>4</td>
<td>MAR-13</td>
<td>1,084.32</td>
<td>Top slice 2013 subcont reversal</td>
</tr>
<tr>
<td>ZZZA/003</td>
<td>ZZZA/003</td>
<td>4</td>
<td>MAR-13</td>
<td>1,373.51</td>
<td>Top slice 2014 subcont reversal</td>
</tr>
</tbody>
</table>

Run Options

Report parameters allow you to run the report:

- For one or more more project organisations
- For a specified date range
Year End Grants Report (by date range)

A copy of this report is formally sent out to Heads of Department along with their Departmental Summary Report at the end of each financial year for their review and sign-off. Copies are also electronically sent out to the departmental Grants Contacts. However, the report can be run at any time by the department.

The report:
- picks up grants that have been ‘Open’ in the current year
- shows total actual ‘burdened’ costs analysed by expenditure type
- includes data across all tasks (including Tasks 99 and 100)
- for the current year will provide cumulative totals to date.

Run Options

This report is best run to Excel.

Report Parameters
## Grants Year end Report

**Report period start:** 1 Aug 2013 0:00  
**Report period end:** 31 Jul 2014 0:00  
**Project Organisation:** ZZ Ecology

<table>
<thead>
<tr>
<th>EC Market Price Adjustment</th>
<th>Equipment</th>
<th>Estates Costs</th>
<th>Direct Costs</th>
<th>Infrastructure Technicians</th>
<th>Other Costs</th>
<th>Overheads</th>
<th>Overheads MC Fixed</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------</td>
<td>---------------</td>
<td>--------------</td>
<td>-----------------------------</td>
<td>-------------</td>
<td>-----------</td>
<td>-------------------</td>
<td>-------</td>
</tr>
<tr>
<td>ZZ R0400000/F INTERFACE TABLE REJECTIONS ZZ/AG/2000</td>
<td>RSC</td>
<td>Sponsor Name</td>
<td>P Name</td>
<td>0.00</td>
<td>0.00</td>
<td>87,495.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ZZ R02365 THE FUNCTION AND SUBSTRA ZZ/AG/2023</td>
<td>Sponsor Name</td>
<td>P Name</td>
<td>2,293.32</td>
<td>5,768.00</td>
<td>24,189.63</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ZZ R045221 CONTROL OF PLANT MDCSS ZZ/AG/20124</td>
<td>Sponsor Name</td>
<td>P Name</td>
<td>75,186.30</td>
<td>35,028.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ZZ R08765 REGULATION AND EVOLUTION ZZ/AG/125</td>
<td>Sponsor Name</td>
<td>P Name</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ZZ R05766 EVOLUTION FUNCTION AND DE ZZ/AG/126</td>
<td>Sponsor Name</td>
<td>P Name</td>
<td>14,929.97</td>
<td>33,414.30</td>
<td>1,757.40</td>
<td>9,430.03</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ZZ R085238 UNIVERSITY RESEARCH FELLO ZZ/AG/127</td>
<td>Sponsor Name</td>
<td>P Name</td>
<td>(645.32)</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>945.82</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>POLO的成本</th>
<th>RESEARCH FACILITIES</th>
<th>STAFF COSTS</th>
<th>SUB CONTRACTING</th>
<th>TRAVEL AND SUBSISTENCE</th>
<th>UNIVERSITY FUNDED</th>
<th>Total (Expenditure Category)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
<td>Actual current year</td>
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<tr>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>12,992.24</td>
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<tr>
<td>0.00</td>
<td>0.00</td>
<td>47,457.65</td>
<td>0.00</td>
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<td>0.00</td>
<td>47,457.65</td>
</tr>
<tr>
<td>0.00</td>
<td>0.00</td>
<td>7,031.40</td>
<td>0.00</td>
<td>0.00</td>
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<td>7,031.40</td>
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<tr>
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<td>0.00</td>
<td>196,088.75</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>196,088.75</td>
</tr>
<tr>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>0.00</td>
<td>0.00</td>
<td>23,774.69</td>
<td>(17,048.48)</td>
<td>0.00</td>
<td>0.00</td>
<td>23,774.69</td>
</tr>
<tr>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>214.64</td>
<td>0.00</td>
</tr>
</tbody>
</table>
9. **Detailed Listing of Expenditure**

**Detailed Expenditure Enquiry by Project**

As the name suggests a detailed listing of all expenditures charged to a project from CHRIS, Accounts Payable (AP) and by journal.

Useful for identifying individual invoices (to provide copies to auditors/Research Operations Office) as it includes both the supplier name and their invoice number. VAT on invoices for non-reclaimable grants is separately identified.

**Run options include:**

- individual or ranges of project codes;
- all or just a selection of project statuses;
- a specific date range or project-to-date.

---

### Grants Transactions - Expenditure Detail Query by Project Organisation

<table>
<thead>
<tr>
<th>Project Organisation</th>
<th>Award Number</th>
<th>Project Short Code</th>
<th>Task Number</th>
<th>Expenditure Category</th>
<th>Expenditure Type</th>
<th>GL Date</th>
<th>Transaction Date</th>
<th>Expenditure Comment</th>
<th>Supplier Name</th>
<th>Invoice Number</th>
<th>Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZZ_ECOLOGY</td>
<td>M547898</td>
<td>ZZAG_E15</td>
<td>100</td>
<td>UNIVERSITY PLUMBING</td>
<td>UNIVERSITY</td>
<td>30 Sep 2007</td>
<td>1 Sep 2007</td>
<td>Expenditure For RCF</td>
<td>Avantek</td>
<td>11795</td>
<td>155.70</td>
</tr>
</tbody>
</table>
Expenditure Detail Enquiry by Project Organisation Parameters

Choose date range (optional)

Pick Award numbers (multiples allowed)
Choose status (multiples allowed)

Select all 'A' Select all

Earliest date

Latest date
Payroll Costs

This report provides administrators with a summary of the charging of employees' salaries across all the awards in their department.

Useful for:
- checking the departmental suspense accounts;
- double-checking which grants individuals have been charged against;
- providing a block of payroll data for further analysis.

Run Options

It can be run by:
- a single or range of Award Organisations
- GL period or range of periods
Actual Expenditure (billing report) Final and Total

These reports show expenditure against a specific award/s by transaction or General Ledger (GL) posting dates and are useful for reviewing final expenditure against reports such as Form C’s. It provides detailed information such as:

<table>
<thead>
<tr>
<th>Expenditure Category</th>
<th>Supplier Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenditure Type</td>
<td>Expenditure comment</td>
</tr>
<tr>
<td>GL Period</td>
<td>Payroll ID</td>
</tr>
<tr>
<td>Transaction Date</td>
<td>Task Number</td>
</tr>
<tr>
<td>Invoice Number</td>
<td>Amount</td>
</tr>
</tbody>
</table>

The running of the reports is the same. The only difference between the two reports is that the Total report sub totals each expenditure type.

Run Options
Grant Reports in Cognos

Example of Actual Expenditure (billing report) Final (PDF format)

The excel format will download two sheets for the Grant. The first one is a complete listing of all expenditure as per screen shot below.

Example of Actual Expenditure (billing report) Total (excel format)

The second one is a summary of all expenditure by category as per screen shot below.
## Actual Expenditure (Billing Report) Summary

### For RG123456

#### Transaction date range

<table>
<thead>
<tr>
<th>Project Short Code</th>
<th>Task Number</th>
<th>Expenditure Category</th>
<th>Expenditure Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZZAG/007</td>
<td></td>
<td>EQUIPMENT</td>
<td>EQUIPMENT</td>
<td>3,308.82</td>
</tr>
<tr>
<td></td>
<td></td>
<td>EQUIPMENT</td>
<td>EQUIPMENT</td>
<td>3,308.82</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OTHER COSTS</td>
<td>OTHER COSTS/COSTS</td>
<td>35.95</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OTHER COSTS</td>
<td>OTHER COSTS/COSTS</td>
<td>35.95</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OVERHEADS</td>
<td>OVERHEAD CHEST</td>
<td>78.67</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OVERHEADS</td>
<td>OVERHEAD CHEST</td>
<td>78.67</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OVERHEADS</td>
<td>OVERHEAD DEPARTMENT</td>
<td>55.35</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OVERHEADS</td>
<td>OVERHEAD DEPARTMENT</td>
<td>55.35</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OVERHEADS</td>
<td>POOLED LABOUR</td>
<td>582.69</td>
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<tr>
<td></td>
<td></td>
<td>POOLED LABOUR</td>
<td>PL TECHNICAL</td>
<td>582.69</td>
</tr>
<tr>
<td></td>
<td></td>
<td>POOLED LABOUR</td>
<td>PL TECHNICAL</td>
<td>582.69</td>
</tr>
<tr>
<td></td>
<td></td>
<td>STAFF COSTS</td>
<td>SALARIES</td>
<td>4,331.72</td>
</tr>
<tr>
<td></td>
<td></td>
<td>STAFF COSTS</td>
<td>SALARIES</td>
<td>4,331.72</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TRAVEL AND SUBSISTENCE</td>
<td>TRAVEL/CONFERENCE</td>
<td>731.37</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TRAVEL AND SUBSISTENCE</td>
<td>TRAVEL/CONFERENCE</td>
<td>731.37</td>
</tr>
<tr>
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<td></td>
<td>TRAVEL AND SUBSISTENCE</td>
<td>TRAVEL/FOREIGN</td>
<td>1,313.09</td>
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<td></td>
<td></td>
<td>TRAVEL AND SUBSISTENCE</td>
<td>TRAVEL/SUBSISTENCE</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>TRAVEL AND SUBSISTENCE</td>
<td>TRAVEL/SUBSISTENCE</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TRAVEL AND SUBSISTENCE</td>
<td>TRAVEL/SUBSISTENCE</td>
<td>2,044.46</td>
</tr>
</tbody>
</table>

**Summary**

10,437.66

This report is also used by ROO for completion of Form C’s (annual expenditure statements for EC awards) as well as for final expenditure statements/reports to other sponsors at the end of a grant to detail the costs and prepare the final invoice.
10. Grants Approaching their End Dates

Grants Ended Enquiry Details

This provides you with a list of awards that end on a specified date.

The report comes in two parts

(1) A summary page of all the awards ending on that date

List of Awards Ending on 31 Dec 2012

<table>
<thead>
<tr>
<th>Award Number</th>
<th>Award PI Name</th>
<th>Award Status</th>
<th>Award Start Date</th>
<th>Award End Date</th>
<th>Award Close Date</th>
<th>Budget</th>
<th>Expenditure</th>
<th>Commitment</th>
<th>Funds Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>RG22334</td>
<td>SMITH, Doctor AG</td>
<td>ACTIVE</td>
<td>1 Jan 2009</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>1,343,108.79</td>
<td>1,269,337.28</td>
<td>15,483.39</td>
<td>58,286.12</td>
</tr>
<tr>
<td>RG04532</td>
<td>DAWKIR, Dr Richard</td>
<td>ACTIVE</td>
<td>1 Jan 2010</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>65,000.00</td>
<td>64,855.27</td>
<td>350.25</td>
<td>3,794.48</td>
</tr>
</tbody>
</table>

(2) A detailed page for each RG number, by project and by task number.

List of Awards Ending on 31 Dec 2012

**ZZ_Ecology**

<table>
<thead>
<tr>
<th>Award Number</th>
<th>Award PI Name</th>
<th>Project Short Code</th>
<th>Task Number</th>
<th>Award End Date</th>
<th>Award Close Date</th>
<th>Expenditure Category</th>
<th>Budget</th>
<th>Expenditure</th>
<th>Commitment</th>
<th>Funds Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>RG22334</td>
<td>SMITH, Doctor AG</td>
<td>ZZAD/324</td>
<td>1</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>OTHER COSTS</td>
<td>7,500.00</td>
<td>(4,366.83)</td>
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<td>11,703.00</td>
</tr>
<tr>
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<td></td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>STAFF COSTS</td>
<td>57,447.00</td>
<td>47,622.82</td>
<td>0</td>
<td>9,824.18</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td></td>
<td>64,947.00</td>
<td>40,235.99</td>
<td>163.83</td>
<td>21,527.18</td>
</tr>
<tr>
<td>100</td>
<td></td>
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<td></td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>ESTATES COSTS</td>
<td>21,415.00</td>
<td>21,243.24</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>INDIRECT COSTS</td>
<td>53,914.00</td>
<td>53,560.91</td>
<td>0</td>
<td>343.09</td>
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<td>100</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>INFRASTRUCTURE TECHNICIANS</td>
<td>3,247.00</td>
<td>3,220.96</td>
<td>0</td>
<td>26.04</td>
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<td></td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>PI COSTS</td>
<td>5,856.00</td>
<td>5,015.46</td>
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<td>40.54</td>
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<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>UNIVERSITY FUNDED</td>
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<td>0.00</td>
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<td>100</td>
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<td></td>
<td>83,712.00</td>
<td>83,040.57</td>
<td>0</td>
<td>671.43</td>
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<td>148,659.00</td>
<td>126,296.56</td>
<td>163.83</td>
<td>22,998.61</td>
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</table>

Run Options

Please Select Award Organisation(s):
3-2-1 List: Grants Ended Enquiry Details

By award organisation, awards ending within a specified number of days, e.g. 90, 180 etc.

List of Awards Ending Before 4 Mar 2013

<table>
<thead>
<tr>
<th>Award PI Name</th>
<th>Award Organization</th>
<th>Sponsor Name</th>
<th>Award Number</th>
<th>Project Short Code</th>
<th>Award Status</th>
<th>Award Start Date</th>
<th>Award End Date</th>
<th>Award Close Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMITH, Doctor AG</td>
<td>ZZ_Ecology</td>
<td>SHELL RESEARCH LTD</td>
<td>RG54846</td>
<td>ZZAGI024</td>
<td>ACTIVE</td>
<td>1 Jan 2009</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
</tr>
<tr>
<td>DAYKINIS, Dr Richard</td>
<td>ZZ_Ecology</td>
<td>MICROSOFT RES/LIMITED</td>
<td>RG88763</td>
<td>ZZAGI066</td>
<td>ACTIVE</td>
<td>1 Jan 2010</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
</tr>
<tr>
<td>LINNOM, Dr P</td>
<td>ZZ_Ecology</td>
<td>EC FP7 MC IEF</td>
<td>RG83059</td>
<td>ZZAGI074</td>
<td>ACTIVE</td>
<td>1 Mar 2011</td>
<td>28 Feb 2013</td>
<td>7 Mar 2013</td>
</tr>
</tbody>
</table>

Run Options

![Grants End Date Enquiry](image)
FES List

This report provides administrators with a list of awards that are due to end within a specified time period. Particularly useful for identifying EC grants that only have 7 days between their End and Close dates, thus allowing administrators to plan ahead.

List of Awards Ending Between 1 Aug 2012 And 31 Jul 2013

<table>
<thead>
<tr>
<th>Award Number</th>
<th>Award Organisation</th>
<th>Project Short Code</th>
<th>Award PI Name</th>
<th>Sponsor Name</th>
<th>Award Status</th>
<th>Award Start Date</th>
<th>Award End Date</th>
<th>Award Close Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RS12345</td>
<td>ZZ_Ecology</td>
<td>ZZAG0001</td>
<td>DARWIN, Professor C</td>
<td>BBSRC</td>
<td>ACTIVE</td>
<td>1 Oct 2006</td>
<td>30 Sep 2012</td>
<td>30 Nov 2012</td>
</tr>
<tr>
<td>RS45678</td>
<td>ZZ_Ecology</td>
<td>ZZAG0360</td>
<td>DARWIN, Professor C</td>
<td>THE ROYAL SOCIETY</td>
<td>ACTIVE</td>
<td>1 Sep 2007</td>
<td>31 Aug 2012</td>
<td>30 Nov 2012</td>
</tr>
<tr>
<td>RS12342M</td>
<td>ZZ_Ecology</td>
<td>ZZAGR111</td>
<td>DARWIN, Professor C</td>
<td>EC FP7 CP</td>
<td>ACTIVE</td>
<td>1 Apr 2009</td>
<td>31 Mar 2013</td>
<td>7 Apr 2013</td>
</tr>
</tbody>
</table>

Run options

- by Award Organisation
- for a specific range of dates. E.g. 1 Aug 2012 to 31 July 2013
11. Creating Shortcuts to folders and reports in COGNOS

You can create shortcuts to folders as well as reports. This will save some time when drilling down to either the Grants or the GL Reporting Folders, and regular run reports.

Creating shortcuts to folders

1. From the Public Folders screen, navigate to the folder you wish to create the shortcut to.

2. Click on the More …. Actions button for the folder you wish to create a shortcut to and the Perform an action screen displays.

3. Click on Create a shortcut to this entry … which enables a short cut to be created to My Folders or Add to bookmarks, which is a shortcut from your web browser (you will still need to log into COGNOS once you click on the link in bookmarks)

4. Ensure a location to the short cut is saved.

   In this example click Select My Folders under the Location section.
5. **My Folders** should now show under **Location** to indicate where the shortcut will be stored.

6. Click **Finish** and the last page that was viewed in COGNOS will display.

7. The next time you log into COGNOS and navigate to **My Folders** tab, links to shortcuts will display. Simply click on the relevant link.

Top Tip: You could even make the **My Folders** tab your default Home Page by modifying the sequence of the tabs via **My Area**. (Separate guidance is available)

You can also create short cuts to regularly run reports in **My Folders** or to **Bookmarks**

### Creating a shortcut to a PDF report within a folder

Once you have navigated to the report you wish to run on a regular basis, you can create a short cut. It’s as simple as following the same steps for creating a shortcut to a folder so follow steps 2 – 7 above.

### I have run the report and now wish to create a short cut to the report

When the PDF report is displayed on the screen, click on **Add this Report** then **Add to My Folders** or **Add to My Bookmarks** and repeat the steps above to create the short cut.

It is worth noting that if you have created a shortcut to bookmarks then you will still need to log into COGNOS once you have clicked on the link. It will take you to the parameter screen of the report.

If you would like to save the actual output of a report then once it is in PDF or excel, save it to the file of your choice.
12. Creating a Grants Enquiry Portal Page

Within COGNOS you will automatically have a **Public Folder** and a **My Folders** set up.

If you are mainly using COGNOS for running Grants reports then you can add a Grants Enquiry tab to your screen.

Grants Enquiry tab is useful as it enables Grants Administrators to view the information that PI’s can obtain when they login to COGNOS. PI’s can only view the PI Grants Enquiry report.

### Accessing the PI Report

1. Having logged in, you will be looking at the COGNOS home page (Public Folders, unless you have created a personalized home page), click on the **Live** folder link.

2. Click on **Page Tabs** folder towards the bottom of the list to display the two options as per screen shot.

3. **Click** in the box on the left for **Grants Enquiry**.

4. To add this to your COGNOS pages, click on the **More** action button at the far right hand side for the Grants Enquiry line and click **Add to my portal tabs**.

5. You’ll notice a third tab (Grants Enquiry) will have appeared on your screen.

6. To access the PI reports click on the **Grants Enquiry** page tab, **Reports** tab.

7. **Click on PI Grants Enquiry** (use ‘PI Grants Enquiry – mac’, if accessing from a Mac machine) and select the department code from the drop down list, scroll to the bottom of the page and click **Finish**.

6. A listing of PI names will be displayed. Click on the name to access the summary view of awards. The budget and expenditure figures will be cumulative from the start of the award to the end of the previous working day (data is downloaded into COGNOS from the University Finance System overnight).

   Clicking on any of the blue links allows you to drill down for further information.
Drilling down for further information

Further information available:

- a summary view of expenditure categories (budgets);
- expenditure by type;
- a listing of individual expenditure items and commitments.

Click on the Award Number to break the summary view down by Expenditure Category (budget heading). The budget and expenditure figures will be cumulative from the start of the award.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>XX EXPERIMENTAL PUNTING</td>
<td>ROLL DoctorT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26/06/2016</td>
<td>RG12345</td>
<td>25 February 2011</td>
<td>$16,000.00</td>
<td>$16,000.00</td>
<td>0.00</td>
<td>1,000.00</td>
<td>ON_HOLD</td>
</tr>
<tr>
<td>BAKER, Doctor A</td>
<td>RG12346</td>
<td>30 November 2009</td>
<td>$10,000.00</td>
<td>$5,000.00</td>
<td>0.00</td>
<td>5,000.00</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>ROLL, Doctor T</td>
<td>RG12347</td>
<td>25 February 2011</td>
<td>$200,000.00</td>
<td>$200,000.00</td>
<td>0.00</td>
<td>1,000.00</td>
<td>ON_HOLD</td>
</tr>
<tr>
<td>ESHA, Professor J</td>
<td>RG12348</td>
<td>30 September 2012</td>
<td>$20,000.00</td>
<td>$15,000.00</td>
<td>0.00</td>
<td>5,000.00</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>ROLL, Professor B</td>
<td>RG12349</td>
<td>30 June 2013</td>
<td>$150,000.00</td>
<td>$50,000.00</td>
<td>0.00</td>
<td>100,000.00</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>KRONOS, Professor X</td>
<td>RG12350</td>
<td>31 March 2013</td>
<td>$150,000.00</td>
<td>$150,000.00</td>
<td>0.00</td>
<td>150,000.00</td>
<td>ACTIVE</td>
</tr>
</tbody>
</table>

The Task Number is used to break the project down into smaller work areas if required. Where the award/project has a task 100 this is reserved for central processing to reflect the Non Direct Costs associated with the award.

Click on the Award Number again to view the expenditure by Expenditure Type, this is the lowest level budget heading.
For a listing of expenditure items and commitments click on the **Project Code**. Expenditure items are displayed in date order within each Expenditure Type.
13. Copying Reports

Before you schedule any reports it is **Vital** that you copy the reports and save them to My Folder. If you don’t then you will be scheduling reports with your parameters for the entire School, not just yourself!

To identify which reports you have copied and not just created shortcuts to, it is recommended that a folder for copied reports is created within My Folders.

**Creating a ‘My Copied Reports’ folder within My Folders**

Navigate to the **My Folders** tab and click on the **New Folder Icon** and the following screen will display where you enter in the folder **Name** and **Description**

Once fields have been completed click on **Finish** and the folder will display ready for you to copy reports into it.

**Copying reports for scheduling**

1. Navigate to the report you wish to copy and **click in the box** on the far left of the report name.

2. Click on the **Copy** icon as per the following screen.
3. Click on the **My Folders** tab and then the **My Copied Reports** folder.

4. Click on the **Paste** icon, which is next to the Copy icon. The copied reports will be listed.
14. Scheduling Reports

Before you schedule any reports it is vital that you copy the reports and save them to My Folder. If you don’t then the reports will be scheduled with your parameters for the entire School, not just yourself!

Scheduling reports is very useful if you would like to run the same report/s on a regular basis. However, if you want to schedule a report and save the parameters then the parameters have to be completed first.

Scheduling the report

1. To Schedule the report, click on the schedule icon and the Schedule Listing screen will display.

2. Complete the Frequency fields accordingly as to how the report is to be scheduled.

3. Next, choose the output format for the report by clicking in the Override the default values box under the Options section.

Top Tip! Schedule to run reports after 9.30am as the overnight build should have completed!
You have the options to:

- Set the format output
- Default the delivery method whether it be save, print or email. Email is the best option.

4. Next you need to set the report parameters by ticking **Override the default values** in the **Prompt values** section.

5. Click on **Set**. A parameters screen will display accordingly to the report you are scheduling which you need to complete.

6. Click **Finish** to display the schedule screen.

---

**How do I remove a schedule?**

Navigate to **My Folders**, and click on **More** ... for the report schedule you wish to remove. There will be an option to click called **Remove the Schedule**. A message will pop up asking you if you are sure you want to remove the schedule. Click **OK**.

---

**How do I view a schedule where I requested the output to be saved?**

From the **Home Page** navigate to **My Area**, and click on **My Activities and Schedules**. Click on **Schedules** a list of your schedules will display.
15. Creating a Personalised Page (Tab)

A personalised page can be created giving the advantage of choosing information that is most important to the user. Links to reports as well as web pages can be created. The content and look of the page can also be customised.

1. Click the **New Page** icon to display the screen below.

2. Complete the **Name** field for the tab.

3. Click **Select My Folders** as the location for saving this page, and this should then appear under **Location**.

4. Click **Next** to define the layout for your page. This is where you can specify the number of columns and widths. In this example two columns have been selected.

5. To customise each column, click **Add** at the bottom of the relevant column and the following screen will display.
Creating an IBM Cognos Utility section

6. Click on **IBM Cognos Utility** and the following page will display.

IBM Cognos Content
This is where you can create links to reports you use on a regular basis

IBM Cognos Utility
This is where you can set up links to documents as well as web pages.

7. **Tick** the boxes accordingly:
   a. **Bookmarks Viewer**: this will enable you to add links to reference guides
   b. **HTML Viewer**: this enables you to add links direct to other web pages

8. Click the **yellow arrow** to move the description/s to the right hand box.
9. Click OK at the bottom of the page and the column screen will display with the link/s you have just added. If you don’t wish to add any more section then proceed to step 15 to add your new page to your portal tabs.

10. If you wish to add links for any remaining columns simply click on the Add button for the other column and either click on IBM Cognos Utility again and repeat the above steps 6-9 or IBM Cognos Content and then follow steps 11-13 below.

Creating an IBM Cognos Content Section

11. Following step 10, select IBM Cognos Viewer. This enables you to link directly to a report parameter screen.

12. Click the yellow arrow to move the description to the right hand box.

13. Repeat steps 11 and 12 for each report that you wish to shortcut to (example screen shot below)

14. Click OK and the column screen will display with the link/s you have just added. The next step is to add to the portal tab.

Adding the new page as a portal tab

Once columns have been created complete the remaining steps:

15. Click Next to display the Set Page Style screen where you can enter in a title for your page and set the font (this will be the title that appears on the page, not the title of the tab).
16. Click **Next**, and the following screen will display.

17. Click **Add this page to the portal tabs** and **Finish**. Navigate to the newly created tab.

It would be beneficial if your customised tab was the home page so that all information that is important to you is there as soon as you log in.

**Setting your new tab to be your home page**

1. Click on the Tab Menu icon

2. Select **Modify the sequence of tabs** .... to display the following screen.

3. Click on the page you created e.g. **My Home Page**.

4. Click **To Top**.

5. Click **OK**.

   Your personalised screen is now your home page.

   The next step is to add content to the new tab. Refer to page 44.
How to delete a personalised tab

1. Ensure you are on the tab you wish to delete and click on the Tab Menu icon

2. The following options will display, click on **Remove this tab**. It will no longer display as a tab but will remain in *My Folders*, which is where you can select and delete it.
16. Adding Content to your Personalised Page

Adding links to reference guides via Cognos Utility, Bookmarks Viewer section

This is particularly useful if you wish to create links to guidance material.

**Pre-Requisites:**
- Create a new page by following steps 1 - 5 on page 44
- Add a Cognos Utility, Bookmarks Viewer column as per steps 6 - 10 on pages 45 - 46

1. On your new tab click the **Edit** button for the Bookmarks Viewer section to display the screen below.

2. Complete the following:
   - **Title**
   - Copy and paste the relevant URL link/s into separate rows
   - Complete the **Aliases** field to the name of the link. The name will therefore display instead of the URL.
   - Leave the default of *in a new browser window*
Example of the screen once completed.

3. Click **OK** and your page will display with the links you have just added, example screen shot below for *Reference Material*.

You can have as many links to web pages as you wish by clicking on the edit button of your personalised page and adding in another *Cognos Utility, HTML viewer* section.
Adding a report parameter to a personalised page

Pre-Requisites:
- Create a new page by following steps 1 - 5 on pages 44
- Add a Cognos Content, Cognos Viewer column as per steps 11 - 13 on page 46

1. Click the Edit button for the Cognos Viewer section on your personalised page.

2. The Set the properties – IBM Cognos Viewer page displays where you complete the following:
   - Enter a title eg the name of the report you are short cutting to.
   - In the Entry section click on Select an entry …
   - Select the relevant link as to where the report is eg. Public Folders > LIVE > the relevant school > Departmental (Shared) Reports > GL or Grants Reporting. Click the radio button of the report you wish to add.
   - Click OK.

3. The trail you have created is now displayed in the Entry section. Click the Report Properties link which is at the end of the trail.

4. It is important to set the properties correctly so that the parameter screen displays each time for you along with the toolbar that displays when you run a report to PDF e.g. convert to excel, run but amend a parameter
   - a. Fragment Action: run the report
   - b. Prompt the User: every time
   - c. Show Toolbar: Normal mode

5. Click OK.

6. Click OK.

7. The page should display with the parameters screen for the report you have linked to.

If there are more report parameters screens you would like to add to your page then click the edit button for the page and add in another Cognos Viewer section.

Top Tips!
- Once you have created your personalised page and added links you can then move the sections around to a look that suits you by clicking on the Page Edit button and using the arrows to move sections across, up and down. You Can edit any of your pages in this way.
- Once you have run a report on your personalised page, click on the refresh icon next to the Log Off link to clear the report from the screen.
17. Setting My Preferences: My Area

You can set some defaults in terms of report format preference, screen colours and amend the sequence of your tabs.

From the Cognos home page, click on the icon which is displayed the top right hand side of your screen. The two common reasons for using this icon are to set preferences and view reports you have scheduled.

My Preferences

The General tab displays, where you can amend the following:

- **Number of entries in list view**
  Amend to 100 so that you can view all available reports on one page

- **Report Format**
  Amend to your preference

- **Un-tick the Show the Welcome page at start up**

- **Style**
  This is where you can amend your screen colours

The Portal Tabs enables you to modify the sequence of the tabs.

Whichever tab is at the top of the list becomes the first one to display every time you log into Cognos.