Grant Reports in Cognos
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1. Research reporting – Administrators

The data used in these reports is downloaded into Cognos from the University Finance System (UFS) 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) it is linked to the selected organisation. This determines the project org and the award org. The project org determines which GL cost centre the project expenditure maps to in M Source of Funds in the GL.

Usually a project org will be the same as the award org. This would only be different if the award has more than one project associated to it, and the projects are not in the same departments. This can be changed during the life of the grant, for example, at year end for departmental mergers and movements.
2. **Computer settings for Cognos users**

Please refer to the IBM website for latest supported software, including web browsers, if you experience problems:


Pop ups and Java Script should be enabled.

**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.

**Signing into Cognos**

You need a Raven password, see [https://raven.cam.ac.uk/](https://raven.cam.ac.uk/). In addition, you need to have completed the Cognos access form (URL [https://www.finance.admin.cam.ac.uk/cognos-access-request](https://www.finance.admin.cam.ac.uk/cognos-access-request)).

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

[http://www.admin-reporting.cam.ac.uk/](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 **OK** button. Either the **Cognos Welcome** or the **Public Folders** page is displayed

**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 assistance on accessing Cognos, please contact the Reporting Help Desk:

email: [FSG.System.Support@admin.cam.ac.uk](mailto:FSG.System.Support@admin.cam.ac.uk)
3. Finding the grants reports

Once you have logged into Cognos, the Public Folder page will be the default home page, unless you change it.

Home

Once you have logged in, the Public Folders page displays as per the screen shot below.

![Screen shot of Public Folders page]

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>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 run all relevant reports. You will have access to the Grants folder, the General Ledger folder or both depending on what you specified on the form.

![Screen shot of Public Folders page]

Grants Reporting folder

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

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

Reports in the Departmental (Shared) Reports folder are the standard Grants reports that are available to all Grants users, regardless of which school you are in. If you use your named departmental folder instead, the reports will be unique to that department. In some cases, widely used reports may also be in the Other folder.
If you are unable to view folders or the list of *Departmental (Shared) Reports* for your school, please contact FSG.System.Support@admin.cam.ac.uk and ask them to check your set up.

### Actions buttons

Each report has a selection of available actions that can be carried out against it. The Actions (visible on the right of the screen) available with the report are dependent on how each report has been created and saved by the author. (At the University, this is usually the Cognos reporting team).

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Folder Icon" /></td>
<td>Set properties</td>
<td>View information about the selected report. There are two tabs: General and Report view.</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></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><img src="image" alt="Clock Icon" /></td>
<td>Schedule</td>
<td>Enables you to schedule reports to run on a regular basis</td>
</tr>
<tr>
<td><img src="image" alt="More Icon" /></td>
<td>More</td>
<td>Provides the following functions in addition to those listed above…</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>Available actions:</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- Set properties</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- View report output versions</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- View my permissions...</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- Run with options...</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- View the schedule</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- View run history</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- Alert me about new versions</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- Copy…</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- Create a shortcut to this entry…</td>
</tr>
<tr>
<td><img src="image" alt="Options Icon" /></td>
<td></td>
<td>- Add to bookmarks…</td>
</tr>
</tbody>
</table>

This icon indicates your output preference, which can be changed via *My Area, My Preferences*. 
4. 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. This is where you can set/check the format and whether you wish to view the report, print the report or have it emailed to you.

NB: 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 2007 Data, Excel 2002, CSV, XML formats, and be distributed by email and/or printed.

Once you have made your selection, click Run, to display the parameters for the selected report. These must be completed before the report retrieves the relevant data.
Running a PDF report or to screen

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Returns to the list of reports. Use this and NOT the browser Back arrow</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Attach to and send an email</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Run the same report with different parameters.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Choose, from a dropdown list, other report formats (refer to section on converting to Excel below).</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Shortcut to add report to My Folders or Add to Bookmarks (refer to separate guidance)</td>
</tr>
</tbody>
</table>

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. (View in Excel 2007 Format recommended)

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

4. An excel page will open with the report contents. You may need to Enable Editing.
5. Consolidated Grants Report

There is an ongoing project to consolidate the multitude of grants reports into a few reports where the user can customise the output to suit their own requirements. This section will be updated as the new consolidated reports are launched: Last updated 02/Nov/2020.

Cognos GM: Listing and Budget vs Actual Reports

For the full documentation of this report, please see Consolidated Grants report – Listing and Budget vs Actual (Finance Division > Training > Guidance & FAQs > Cognos).

To access the new report, navigate to Public Folders >Live > your school folder > Departmental (Shared) Reports folder.

This report is intended for use by departments, schools, Central Finance and the Research Office. It uses the standard security model, restricting returned information to only the Projects and Awards the user has been granted access to.

The default format for this report is set to PDF, but can provide output in all standard formats (including Excel and HTML). To select a different report format, or to save or email the report, use Run with options, on the right of the report selection line.

Note: This report contains a number of re-prompt buttons that restrict the lists of values to only relevant values. When you use a re-prompt button you will receive a message stating: Working… Please Wait…, then Your report is running. Please be patient until the prompt page is regenerated.

You can create a Report View to save commonly used parameters, or to schedule this report, see report view scheduling.

Basic Report – Lists

At a basic level the user can select to run the report by EITHER Award organisation(s) or Project Organisation(s). If no other parameters are selected the report output will be a list of awards or projects, together with start and end dates.

Note: For users with wide access, ensure you select the Award Org/Project Org before running the report. Choose Click Here for Award Org/Project Org Selection to populate the selection box. Users with access to a single department can omit this step.

Example of report run by Award Organisation:

<table>
<thead>
<tr>
<th>Grants Listing Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Organisation</td>
</tr>
</tbody>
</table>

Note: If you select Project Short Code as an extra option, the list will display all projects, regardless of whether the project belongs to your department or not, as long as the Award Organisation is yours.
Example of report run by Award Organisation, with Project Short Code as extra option:

<table>
<thead>
<tr>
<th>Award Organization</th>
<th>Award Number</th>
<th>Project Short Code</th>
<th>Award Creation Date</th>
<th>Award Start Date</th>
<th>Award End Date</th>
<th>Award Close Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PD_Plant Sciences</td>
<td>G100497</td>
<td>NMZM/404</td>
<td>15-Aug-19</td>
<td>1-Jan-19</td>
<td>31-Dec-20</td>
<td>26-Feb-21</td>
</tr>
<tr>
<td>PD_Plant Sciences</td>
<td>G100497</td>
<td>PDAG/488</td>
<td>15-Aug-19</td>
<td>1-Jan-19</td>
<td>31-Dec-20</td>
<td>26-Feb-21</td>
</tr>
<tr>
<td>PD_Plant Sciences</td>
<td>G101676</td>
<td>PDAG/492</td>
<td>21-Jun-19</td>
<td>1-May-19</td>
<td>30-Jun-20</td>
<td>30-Aug-20</td>
</tr>
<tr>
<td>PD_Plant Sciences</td>
<td>G101701</td>
<td>PDAG/515</td>
<td>29-Jan-20</td>
<td>1-Jan-20</td>
<td>31-May-23</td>
<td>31-Jul-23</td>
</tr>
<tr>
<td>PD_Plant Sciences</td>
<td>G101906</td>
<td>PDAG/524</td>
<td>3-Mar-20</td>
<td>1-May-20</td>
<td>6-Sep-23</td>
<td>6-Nov-23</td>
</tr>
<tr>
<td>PD_Plant Sciences</td>
<td>G101832</td>
<td>NMZM/455</td>
<td>5-Jul-20</td>
<td>1-Jan-20</td>
<td>31-Dec-20</td>
<td>26-Feb-21</td>
</tr>
<tr>
<td>PD_Plant Sciences</td>
<td>G101832</td>
<td>PDAG/541</td>
<td>5-Jul-20</td>
<td>1-Jan-20</td>
<td>31-Dec-20</td>
<td>26-Feb-21</td>
</tr>
<tr>
<td>PD_Project Sciences</td>
<td>G102801</td>
<td>PHZM/903</td>
<td>12-Sep-19</td>
<td>1-Oct-19</td>
<td>31-Dec-22</td>
<td>28-Feb-23</td>
</tr>
<tr>
<td>PD_Plant Sciences</td>
<td>G102821</td>
<td>PDAG/495</td>
<td>25-Jul-19</td>
<td>1-Jul-19</td>
<td>30-Apr-20</td>
<td>30-Jun-20</td>
</tr>
</tbody>
</table>

Example of report run by Project Organisation:

<table>
<thead>
<tr>
<th>Award Organization</th>
<th>Project Organization</th>
<th>Project Short Code</th>
<th>Project Start Date</th>
<th>Project End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PD_Plant Sciences</td>
<td>PD_Plant Sciences</td>
<td>PDAG/000</td>
<td>1-Aug-2001</td>
<td>31-Jul-2002</td>
</tr>
<tr>
<td>NA_Engineering - D3 Structures</td>
<td>PD_Plant Sciences</td>
<td>PDAG/168</td>
<td>1-Jul-2010</td>
<td>1-Apr-2017</td>
</tr>
<tr>
<td>PD_Plant Sciences</td>
<td>PD_Plant Sciences</td>
<td>PDAG/189</td>
<td>1-Oct-2010</td>
<td>30-Apr-2019</td>
</tr>
<tr>
<td>PD_Project Sciences</td>
<td>PD_Project Sciences</td>
<td>PDAG/223</td>
<td>1-Oct-2012</td>
<td>30-Sep-2018</td>
</tr>
<tr>
<td>PD_Project Sciences</td>
<td>PD_Project Sciences</td>
<td>PDAG/226</td>
<td>15-Aug-2012</td>
<td>1-Oct-2021</td>
</tr>
<tr>
<td>MA_Chemistry</td>
<td>PD_Project Sciences</td>
<td>PDAG/232</td>
<td>1-Oct-2012</td>
<td>30-Sep-2016</td>
</tr>
<tr>
<td>PD_Project Sciences</td>
<td>PD_Project Sciences</td>
<td>PDAG/240</td>
<td>1-Dec-2012</td>
<td>31-May-2017</td>
</tr>
</tbody>
</table>

Note: All projects that belong to your Project Organisation are displayed, regardless of which Award Organisation owns the actual project.

Note: By selecting other optional parameters and report layout options the user can choose the data required, including budget, actual and commitments if desired.

Default options

There are a number of default options and some of these can be overridden by the user.

When running the report by Award Organisation, the default position:

- Excludes awards that have been closed [can be overridden by the user].
- Shows Award Number(s) [cannot be overridden by the user].

When running the report by Project Organisation, the default position:

- Excludes both awards and projects that have been closed [can be overridden by the user].
- Shows Project Code(s) [cannot be overridden by the user].
The following optional layout options can be selected by the user:

![Optional Layout Options](image)

**Note**: At the bottom of the report (PDF) there is a page giving *Report Information*, which lists your selections. In Excel, it is shown as a separate worksheet.

**Adding financial information to basic list report**

To add the Budget and Actual/Expenditure for the awards and/or projects, depending on the information required, check either:

- Show BvA Page (breakdown by Project Code/Exp Cat)
- Show BvA Page (breakdown by Award/Exp Cat)

The report returns the same list as the basic list, but it includes **further pages** which give a breakdown of the budget and expenditure, per expense category, for either the award or the project. To include commitments, tick the *Show Commitments* box as well.

*Example of report run by Project Organisation, with Optional selections of Show BvA Page (breakdown by Project Code/ExpCat), plus Show Commitments*
Note: if you want the financial information to show on same line, i.e. a summary report, select **Show Budget to Actual**, and **Show Commitments** (if required). This option would not give the **Expenditure Category**, unless ticked.

**Example of report run by Project Organisation, with Optional selections of Show Award Number, Show Budget to Actual and Show Commitments:**

<table>
<thead>
<tr>
<th>Award Organization</th>
<th>Project Organization</th>
<th>Award Number</th>
<th>Project Short Code</th>
<th>Project Start Date</th>
<th>Project End Date</th>
<th>Budget</th>
<th>Expenditure</th>
<th>Commitment</th>
<th>Balance Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZZ_Ecology</td>
<td>ZZ_Ecology</td>
<td>RG00000(ZZAG)</td>
<td>Zzag000</td>
<td>1-Aug-01</td>
<td>31-Jul-30</td>
<td>5,493.19</td>
<td></td>
<td>0.00</td>
<td>(5,493.19)</td>
</tr>
<tr>
<td>XA_Cosmos</td>
<td>ZZ_Ecology</td>
<td>RG00000(Zzag)</td>
<td>Zzag011</td>
<td>1-Jul-10</td>
<td>1-Apr-17</td>
<td>24,872.32</td>
<td>24,872.32</td>
<td>0.00</td>
<td>(24,872.32)</td>
</tr>
<tr>
<td>ZZ_Ecology</td>
<td>ZZ_Ecology</td>
<td>RG00001(Zzag)</td>
<td>Zzag112</td>
<td>1-Oct-10</td>
<td>30-Apr-19</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>(0.00)</td>
</tr>
<tr>
<td>YEA_Environmental</td>
<td>ZZ_Ecology</td>
<td>RG00004(Zzag)</td>
<td>Zzag115</td>
<td>1-Dec-12</td>
<td>31-May-17</td>
<td>299,781.73</td>
<td></td>
<td>0.00</td>
<td>25,066.21</td>
</tr>
<tr>
<td>ZZ_Ecology</td>
<td>ZZ_Ecology</td>
<td>RG00005(Zzag)</td>
<td>Zzag116</td>
<td>1-Oct-13</td>
<td>30-Apr-19</td>
<td>225,735.48</td>
<td></td>
<td>0.00</td>
<td>837.16</td>
</tr>
<tr>
<td>ZZ_Ecology</td>
<td>ZZ_Ecology</td>
<td>RG00006(Zzag)</td>
<td>Zzag117</td>
<td>15-May-13</td>
<td>30-Sep-19</td>
<td>591,848.00</td>
<td>596,715.51</td>
<td>0.00</td>
<td>(4,867.51)</td>
</tr>
</tbody>
</table>

Any of the other **Show** options can be selected, although some of these have dependencies on the layout option selected above.

**Sponsor Type and/or Sponsor Name**

The report can be run for selected Sponsor Type(s) and/or selected Sponsor Name(s). The user must first select **Show Sponsor Type** and/or **Show Sponsor Name** under **Layout options**. Then choose

Optional. Click here to select Sponsor Name/Sponsor Type.

This displays and populates the **Sponsor Type** and **Name** field boxes from which you can select the relevant data.
For **Sponsor Type** – you can select a single type, multiple (use Ctrl+click) or Select All.

For **Sponsor Name** – you can use the Cognos Search and Select method, or choose the name from the field box underneath (individual, multiples or all).

**Task Numbers**

The user can choose to exclude Task Number(s). The user must first select Show Task Number AND Show Budget to Actual (NOT Show BvA page) under Layout Options. Then choose:

Once the task number field box is populated, check the relevant box to exclude that task number(s).

**Awards/Projects ending**

The user can choose to run the report to show Awards ending (for Award Organisation Report) or Projects ending (for Project Organisation Report) within a user specified number of days or for a user specified From or To date.

- Entering number of days shows all awards/projects ending within the number of days entered from the date the report is run.
- Using a From date only shows all awards/projects ending after the date selected.
- Using a To date only shows all awards/projects ending before the date selected.
- Using a From and To date shows all awards/projects ending within the date range selected.

If no dates are selected, the default is Earliest date to Latest date.

**Award Creation Date**

The user can opt to run the report for awards created within a date range specified by the user. A From date, a To date or a From and To date can be selected here.

- Using a From date only shows all awards created after the date selected.
- Using a To date only shows all awards created before the date selected.
- Using a From and To date shows all awards created within the date range.

**Saving selections**

To save and schedule your selection parameters for all Cognos reports, refer to either Creating a Report View or to Schedule a report with report view setup. To avoid confusion, remember to change the name of the report as soon as you copy it, particularly now that this report can be set to show completely different types of grant information.
6. 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. It lists all projects belonging to the named PI. The report returns the following data, with cumulative project-to-date totals. There is a separate page for each PI.

Run options

These include:

- by Project Organisation— if you select a project organisation but no data is returned then this means that there are no open projects on that organisation
- by individual PI, all or multiples
Grants by Sponsor Type

This suite of reports has been replaced by the consolidated Grants report: GM Listing and Budget vs Actual Reports.

As a result, you can customise the report to display whatever information you need, provided the field is included in the Optional layout options. You must first decide whether it should be run by Award Organisation or by Project Organisation.

Refer to the section on Sponsor Type and Name in order to use these fields optimally. By running this optional function, a table is populated with all the Sponsor Names and Sponsor Types, which acts as a filter. You can select one sponsor name or type, multiples or all.

Suggested options:

For basic report showing Sponsor Type, by Award Organisation

- Show Award PI Name
- Show Project Short Code
- Show Budget to Actual
- Show Project Short Code
- Show Sponsor Type

Additional fields that may be useful:

- Show Award Title
- Show Commitments
- Show Sponsor Name
- Show Project PI Name
- Show Funding Ref

Note: If you choose to run the report by Project Organisation, you could choose Show Award Number instead of Show Project Short Code.

Example of GM: Listing and Budget vs Actual Reports, with optional selections to show sponsor types
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>RG46774</td>
<td>ZZAZ1/68</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/ E527163/1</td>
<td>704,361.50</td>
</tr>
<tr>
<td>RG46774</td>
<td>ZZAZ1/68</td>
<td>RESEARCH COUNCIL - BBSRC</td>
<td>ZZ_Ecology</td>
<td>SMITH, Dr AQ</td>
<td>1 Oct 2006</td>
<td>30 Sep 2012</td>
<td>ACTIVE</td>
<td>BB/ E526101/1</td>
<td>650,664.00</td>
</tr>
<tr>
<td>RG46708</td>
<td>ZZAZ1/356</td>
<td>RESEARCH COUNCIL - NERC</td>
<td>ZZ_Ecology</td>
<td>DAYKINS, Dr Richard</td>
<td>1 Oct 2008</td>
<td>30 Sep 2012</td>
<td>ACTIVE</td>
<td>NE/ 052441/1</td>
<td>82,424.98</td>
</tr>
</tbody>
</table>

Run options

- Single or multiple Award Organisation

Select required Organisation, or multiple organisations:

- PH_Biochemistry - Research
- PH_Biochemistry - Stem Cell Institute
- PH_Biochemistry Neuroscience
- PJ_Psychology
- PK_Pathology
- PK_Pathology - Stem Cell Institute
- PL_Pharmacology
- PM_PDH - Stem Cell Institute
- PM_Physiology,Devmt & Neuroscience
- PNA_Veterinary Medicine: Teaching and Research
- PN_Veterinary Medicine: Teaching and Research
- PP_Veterinary Medicine: Vet Hospital
- PR_Welcome Trust/CRC Institute - CRC B'Chemistry
- PR_Welcome Trust/CRC Institute - CRC Genetics
- PR_Welcome Trust/CRC Institute - CRC Med Anatomy
- PR_Welcome Trust/CRC Institute - CRC Pathology
- PR_Welcome Trust/CRC Institute - CRC Zooology
- PR_Welcome Trust/CRC Institute - Institute CRC
- PR_Welcome Trust/CRC Institute - Welcome Trust
- PR_Welcome Trust/CRC Institute - Welcome B'Chemistry

Cancel  < Back  Next >  Finish
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 start and end dates not included. Commitments are excluded.

Run options

- Can be run for either a single project or multiple projects but **single** recommended. (If run for multiple projects, then data for all projects will be consolidated into just one summary, and a list of the projects selected will be displayed at the top of the report.)

- Can be run for all costs on the project to date (select **Earliest date** and **Latest date**) or a particular date range specified, (as in the example above).
7. **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/G* number and a specific date range. The report returns the total expenditure per month for each grant selected. If multiple awards are chosen, each one appears on separate page. *NB: Commitments are excluded.*

**Parameters**

Example of report

<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 xxxxx</td>
<td>BBSRC</td>
<td>JAN-17</td>
<td>13,466.94</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>FEB-17</td>
<td>13,682.09</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>MAR-17</td>
<td>16,819.72</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>APR-17</td>
<td>14,795.65</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>MAY-17</td>
<td>13,555.78</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>JUN-17</td>
<td>15,718.37</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>JUL-17</td>
<td>18,638.08</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>AUG-17</td>
<td>15,897.12</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>RG12345</td>
<td>126,573.75</td>
</tr>
<tr>
<td></td>
<td>Summary</td>
<td></td>
<td>Summary</td>
<td>126,573.75</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)
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
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 is not restricted to year end, and can be run at any time.

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)
- provides cumulative totals to date for the current year.

Run options

This report is best run to Excel.

Report parameters
# Grants: Reporting in Cognos

## Grants Year end Report

<table>
<thead>
<tr>
<th>Project Organisation</th>
<th>Project Code</th>
<th>Sponsor Name</th>
<th>Principal Name</th>
<th>EC FY WT 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 EC Fixed</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZZ</td>
<td>ZZG00000Y</td>
<td>SUSPENSE</td>
<td></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>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

## PI Costs

<table>
<thead>
<tr>
<th>PI Code</th>
<th>PI Description</th>
<th>PI Costs</th>
<th>POOLED LABOUR</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>ZZG0000Y</td>
<td>Interface Table Rejection ZZG/000Y</td>
<td>0.00</td>
<td>12,992.24</td>
<td>0.00</td>
<td>47,457.65</td>
<td>7,031.40</td>
<td>196,088.76</td>
<td>0.00</td>
<td>214.61</td>
</tr>
<tr>
<td>ZZG0000Z</td>
<td>Function and Substratum ZZG/000Z</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>23,774.69</td>
<td>0.00</td>
<td>0.00</td>
<td>214.61</td>
<td>282,032.86</td>
</tr>
</tbody>
</table>

---

*Note: The report details the expenditure for different projects, including the actual costs in each category.*

---

*Note: The report details the expenditure for different projects, including the actual costs in each category.*
8. Detailed listings of expenditure

Detailed Expenditure Enquiry by Project

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

It can be used to identify 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 multiple project codes;
- single, all or a selection of project statuses;
- specific date range by either GL or Transaction, or project-to-date.

This report is best run to Excel.
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

The report can be run by:
- single or multiple Award Organisations
- single or multiple GL Periods

Parameters

The report can be run by:
- single or multiple Award Organisations
- single or multiple GL 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 the annual expenditure statements for EC awards (Form Cs). 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, as is the total. The differences are given in table below:

<table>
<thead>
<tr>
<th>Actual Expenditure (Billing report) Final</th>
<th>Actual Expenditure (Billing report) totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net amount and VAT shown in separate lines</td>
<td>Transactions show gross amount</td>
</tr>
<tr>
<td>Includes Award number in each line</td>
<td>Award number in heading only</td>
</tr>
<tr>
<td>Sub-totals by Expenditure Category &amp; Task</td>
<td>Sub-totals by Expenditure Category/Type &amp; Task</td>
</tr>
<tr>
<td>Second tab (Excel) = summary per project, task NOT included</td>
<td>Second tab (Excel) = summary per project, by task, expenditure category and type.</td>
</tr>
</tbody>
</table>

These reports are currently found in the Grants Reporting >Other folder.

Run options

The Final version of this report is best run to Excel due to number of columns. The Total version can be run in either, but occasionally the columns run over two pages. In Excel format, the report produces two worksheets, in PDF format, page down to view the Expenditure by Category detail.
Parameters

Example of Actual Expenditure (billing report) Final (Excel format)
**Second tab (Final)** is a summary, per project, of all expenditure by category and type.

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

*Page 1* worksheet is a complete listing of all expenditure as per screenshot below.
Page 2 is a summary of all expenditure by category as per screen shot below.

This report is also used by ROO for completion of Form Cs (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.
9. **Grants approaching their end dates**

**Grants Ended Enquiry Details**

This report provides 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**

   **Award Organisation: ZZ_Ecology**

<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>RG23234</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>58,288.12</td>
</tr>
<tr>
<td>RG54532</td>
<td>DAWKIN, Dr Richard</td>
<td>ACTIVE</td>
<td>1 Jan 2010</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>69,000.00</td>
<td>64,855.27</td>
<td>350.25</td>
<td>3,794.48</td>
</tr>
</tbody>
</table>

2. A detailed page for each award (RG/G 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>RG23234</td>
<td>SMITH, Doctor AG</td>
<td>ZZAG/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>(4,306.03)</td>
<td>163.83</td>
<td>11,703.00</td>
</tr>
<tr>
<td>RG23234</td>
<td>SMITH, Doctor AG</td>
<td>ZZAG/324</td>
<td>1</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>STAFF COSTS</td>
<td>57,467.00</td>
<td>47,622.82</td>
<td>0</td>
<td>5,842.18</td>
</tr>
<tr>
<td>RG23234</td>
<td>SMITH, Doctor AG</td>
<td>ZZAG/324</td>
<td>100</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>
<td>0</td>
<td>171.76</td>
</tr>
<tr>
<td>RG23234</td>
<td>SMITH, Doctor AG</td>
<td>ZZAG/324</td>
<td>100</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>INDIRECT COSTS</td>
<td>53,994.00</td>
<td>53,560.91</td>
<td>0</td>
<td>433.09</td>
</tr>
<tr>
<td>RG23234</td>
<td>SMITH, Doctor AG</td>
<td>ZZAG/324</td>
<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>
</tr>
<tr>
<td>RG23234</td>
<td>SMITH, Doctor AG</td>
<td>ZZAG/324</td>
<td>100</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>PC COSTS</td>
<td>5,056.00</td>
<td>5,015.46</td>
<td>0</td>
<td>40.54</td>
</tr>
<tr>
<td>RG23234</td>
<td>SMITH, Doctor AG</td>
<td>ZZAG/324</td>
<td>100</td>
<td>31 Dec 2012</td>
<td>28 Feb 2013</td>
<td>UNIVERSITY FUNDED</td>
<td>0.00</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Run options**

- Single or multiple Award Organisation

The date the award is ending must be known in order to run this report.
Run parameters

Grants Ended Enquiry

Please Select School:
- School of Clinical Medicine
- Associated Bodies
- NSI
- Unknown
- School of Technology
- School of Arts and Humanities
- LAS
- School of the Humanities and Social Sciences

Please Select Award Organisation(s):
- PA_School of the Biological Sciences
- PA_SBS: University Biomedical Support Serv
- PC_Genetics
- PC_Genetics - Stem Cell Institute
- PC_Plant Sciences
- PC_Cambridge University Botanic Garden
- PF_Zoology
- PF_Zoology - Animal Physiology
- PF_Zoology - Behaviour 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
- PF_Zoology - Population and Community Ecology
- PG_Anatomy
- PH_Biochemistry
- PH_Biochemistry - Biomechanics and Metabolism
- PH_Biochemistry - CEBBS Mol Graph Comp Facility
- PH_Biochemistry - Cardiovascular Biology
- PH_Biochemistry - Microbial Biochem and Mol Bio
- PH_Biochemistry - NMR & X-Ray Crystallography
- PH_Biochemistry - Plant Biochem and Mol Biol
- PH_Biochemistry - Prot & Nucleic Acid Chem Fac
- PH_Biochemistry - Protein & Nucleic Acid Chem
- PH_Biochemistry - Protein Synthesis. Cell Biol
- PH_Biochemistry - Research
- PH_Biochemistry - Stem Cell Institute
- PH_Biochemistry-NeuroScience
- DJ_Psycho

Awards Ending - Specify date:

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>20</td>
<td>21</td>
<td>22</td>
<td>23</td>
<td>24</td>
<td>25</td>
</tr>
<tr>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
<td>31</td>
</tr>
</tbody>
</table>

Select all Deselect all
3-2-1 List: Grants Ending within a specified period & FES List

These reports have been replaced by the Consolidated GM Listing and Budget vs Actual Reports. In the past, the 3-2-1 report did not require a specified end date, but rather allowed the user to specify how many days forward was required e.g. ending within 7 days, 30 days, 90 days, 180 etc. The FES List, on the other hand, required users to specify a time period. Both reports did not give any financial details.

With the new report, users can customise what is listed, whilst still specifying the period or days forward required.

Refer to the section on Awards/Projects ending to add days or period required.

Suggested Options:

| For a basic report, by Award Organisation | • Show Award PI Name  
• Show Award Status  
• Show Project Short Code  
• Show Sponsor Name |
|---|---|
| Additional fields that may be useful: | • Show Project PI Name  
• Show Budget to Actual  
• Show Commitments |

Note: If you choose to run the report by Project Organisation, you could choose Show Award Number instead of Show Project Short Code. The dates will work on the Project End Date, rather than the Award End Date.

Example of GM: Listing and Budget vs Actual Reports, with optional selections to show Grants ending within 60 days
10. Creating shortcuts in Cognos

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

**Creating a short cut to the report after running it**

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 directory/file of your choice.
11. 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.

The Grants Enquiry tab is useful as it enables Grants Administrators to view the information, as displayed to PIs when they login to Cognos. PIs can only view the PI Grants Enquiry report for awards where they are the named key member.

Accessing the PI report

1. Having logged in, you will be looking at the Cognos home page (Public Folders, unless you have created a personalised 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. A third tab (Grants Enquiry) will appear 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 (Award Organization) from the drop down list, scroll to the bottom of the page and click Finish.

8. A listing of PI names will be displayed. Click on the relevant name to access the summary view of all awards linked to that PI. 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.

Top Tip: If there is a missing award/project, the cause is either the PI is not named on that award, or the award belongs to another department.

Drilling down for further information

Further information available:

- summary view of expenditure categories (budgets)
- expenditure by type
- 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>Award Number</th>
<th>Award End Date</th>
<th>Budget</th>
<th>Expenditure</th>
<th>Commitment</th>
<th>Surplus/Deficit</th>
<th>Award Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>RG12345</td>
<td>30th September</td>
<td>£90,000.00</td>
<td>£50,000.00</td>
<td>0.00</td>
<td>£40,000.00</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>RG12346</td>
<td>30th September</td>
<td>£20,000.00</td>
<td>£5,000.00</td>
<td>0.00</td>
<td>£5,000.00</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>RG12347</td>
<td>30th September</td>
<td>£100,000.00</td>
<td>£50,000.00</td>
<td>0.00</td>
<td>£50,000.00</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>RG12348</td>
<td>30th September</td>
<td>£180,000.00</td>
<td>£90,000.00</td>
<td>0.00</td>
<td>£90,000.00</td>
<td>ACTIVE</td>
</tr>
</tbody>
</table>

The award Details are shown below the selected PI’s list of awards, in the same report.

- 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. The report opens in a new tab.

For a listing of expenditure items and commitments, click on the **Project Code** from the report shown above. Expenditure items are displayed in date order within each Expenditure Type. The report opens in a new tab.

The PI Grants Enquiry will only show awards belonging to the Award Organisation (Department). Projects headed by the PI but where the award is held by another department will NOT be included.
12. Copying reports

Before scheduling any reports, it is **VITAL** that you first **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**. The following screen will display where you type in the folder **Name** and **Description**.

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

**Copying reports**

1. Navigate to the report you wish to copy. Check the box on the far left of the report name.

2. Click on the **Copy icon** as shown on 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.
13. Scheduling reports

Before scheduling any reports, it is **VITAL** that you first **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!

Scheduling reports is useful if you 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. If the report to be scheduled includes **GL** or **transaction** date choices in its parameters, you will have to update these before the report is run.

**Scheduling the report**

1. To schedule the report, click on the **schedule icon** (on the right, between the blue arrow and **More...** icons) 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 in the **Options** section.

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

- Set the format output if different to your My Preferences choice
- Default the delivery method whether it be save, print or email. Email is the recommended option. Print should not be selected at this stage.

4. Set the report parameters by ticking **Override the default values** in the **Prompt values** section.

5. Click on **Set**. A **parameters** screen will display according to the report you are scheduling. This needs to be completed.

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.
14. 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. From Select another location, click Select My Folders as the location for saving this page. 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.

- **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.

### Creating an IBM Cognos Utility section

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

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).

Click **Next**, and the following screen will display:
16. Click *Add this page to the portal tabs* and *Finish*. Navigate to the newly created tab.

See *Section 16* to add content to personalised page.

*Recommended*: Make your customised tab your home page so information that is important to you is there in one place when you log in.

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

1. Click on the *Tab Menu* icon in the top left corner of screen.
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*.
6. Your personalised screen is now your home page.
The next step is to add content to the new tab. Refer to Section 16.

**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.
15. 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 in Section 15.
- Add a Cognos Utility, Bookmarks Viewer column as per steps 6 - 10 –in Section 15.

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

2. Complete the following:
   - Title (relevant name for the section you are creating, e.g. Reference material)
   - Copy and paste the relevant URL link/s into separate rows
   - Complete the Aliases field to name the link. The name will then display on your page 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 set up as many sections with links to different content as you wish by clicking on the **edit** button of your personalised page and adding in another **Cognos Utility/Bookmarks viewer** section.
Adding links to webpages via Cognos Utility, HTML Viewer section

Use the HTML viewer to insert any Web page into your personalised page.

1. On the new tab, click the Edit button for the HTML Viewer section to display the screen below:

![HTML Viewer Screen](image)

2. Complete the following:
   - Title (e.g. webpage name)
   - Copy and paste the relevant URL link
   - Leave the Channel name blank
   - Change the Height if required

Example of the screen once completed.

![Completed HTML Viewer Screen](image)
4. Click **OK** and your page will display with the webpage you have just added, example screen shot below for *Finance course timetable*:

![Example Screen Shot](image)

NB: If you use the HTML viewer, you are actually on the selected webpage from within your personalised page. You will need to login with your Raven password if requested.

**Adding a report parameter to a personalised page**

**Pre-Requisites:**
- Create a new page by following steps 1 - 5 in Section 15.
- Add a Cognos Content/Cognos Viewer column as per steps 11 - 13 –in Section 15.

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 e.g. the name of the report to which you are creating the shortcut. If you select *Use the entry name*, Cognos will automatically use the selected report name.
   - In the *Entry* section click on *Select an entry …*
   - Select the relevant link to the report e.g. *Public Folders* > *LIVE* > relevant school > *Departmental (Shared) Reports* > *Grants Reporting*, then 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, if that is what you need, along with the toolbar that allows conversion to excel. Suggested settings:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fragment Action</td>
<td>Run the report</td>
</tr>
<tr>
<td>Prompt the User</td>
<td>Every time</td>
</tr>
<tr>
<td>Show Toolbar</td>
<td>Normal mode</td>
</tr>
</tbody>
</table>
5. Click **OK** after setting the **Report Properties**.

6. Click **OK** to save **Viewer** properties.

7. The page displays with the parameters screen for the report you have linked to, or as selected in the **Set the properties**. Example screenshot below:

![Example screenshot of the report parameters setting](image)

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.
16. 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 at 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**: PDF recommended as it is easy to convert to Excel if necessary
- **Separators in list view**: Alternating backgrounds (easier to read)

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

- Whichever tab is at the top of the list becomes the home page, i.e. the first one to display every time you log into Cognos.