PI Grants Enquiry Report in Cognos

This guide is for PI’s and explains how to log into Cognos, set up a tab that provides access to a summary report for their grants with drill down and exportable options.

Browser settings

If you use a PC, Internet Explorer is the preferred browser, however Firefox can be used with the Mac version of the report, and pop-ups and Java Script should be enabled.

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.

Access and signing into Cognos

A form will need to be completed by the Key Contact in you department requesting access to the grant folder for your School/Department. In addition you will need your CRSID and Raven password.

Upon confirmation that your access has been set up navigate to the Admin Reporting page http://www.admin-reporting.cam.ac.uk/

1. Click on the Cognos Login link, and check that the current status for the grants module is ‘DATAMART OK’. This means that it is fine to log in and run the reports.

2. Click on the link Log in to Cognos, this will open the Cognos instance screen where you enter your CRSID and Raven password.

Creating the PI grants enquiry tab

3. Click OK and the Public Folders page displays. Click on the folder titled LIVE.
4. Click on **Page Tabs** folder towards the bottom of the list to display the two options as per screen shot.

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

6. 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**.

7. The system will take a few seconds and will display the **Public Folders** page with a new **Grants Enquiry** tab.

The next step is to run the summary report.

**Running the PI summary report**

1. Click on the **Grants Enquiry** tab, **Reports**, tab.
2. 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**.

![Image of PI Grants Enquiry](image)

3. PI/s 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.
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.