Cognos Introduction
Table of contents

1. **Computing settings for Cognos users** ................................................................. 1
   - Browser settings .................................................................................................. 1
   - Signing in to Cognos ...................................................................................... 1
   - Signing out of Cognos .................................................................................. 2
   - Moving to another Department? ................................................................. 2

2. **What should I see when I log in?** ....................................................................... 3
   - Home page ...................................................................................................... 3
   - Grants reports .............................................................................................. 4
   - General Ledger reports ............................................................................... 4
   - Action icons ................................................................................................... 5

3. **My Area Options: Setting preferences** ............................................................ 6
   - My Preferences ............................................................................................. 6
   - My Activities and Schedules ...................................................................... 7

4. **Customising Cognos using My Folders** .......................................................... 8
   - Creating a new folder .................................................................................. 8
   - Organising tabs/landing page ...................................................................... 9

5. **Finding and running reports** ............................................................................ 10
   - Finding the reports ..................................................................................... 10
   - Running a report .......................................................................................... 10
   - Running a PDF report .................................................................................. 13
   - Converting a PDF report to Excel ............................................................. 14

6. **Creating shortcuts and bookmarks** .................................................................. 15
   - Creating a report shortcut .......................................................................... 15
   - Creating a shortcut to a folder ..................................................................... 16
   - Creating a short cut to a report after running it ....................................... 17
   - Creating a bookmark .................................................................................... 17

7. **Copying reports** .............................................................................................. 18
   - Copying reports for scheduling .................................................................. 18

8. **Setting up a Report View** ................................................................................ 19
   - Creating a Report View ................................................................................ 19
   - Scheduling a report with report view set up ........................................... 22
9. Scheduling a report ........................................................................................................... 23
   Changing a schedule ......................................................................................................... 24
   Removing/disabling a schedule ........................................................................................ 24
   Viewing a schedule if delivery option Save the report selected ....................................... 25

10. Creating a Personalised Page (Tab) ............................................................................... 26
    Creating an IBM Cognos Utility section .......................................................................... 27
    Creating an IBM Cognos Content section ....................................................................... 29
    Adding the new page as a portal tab .............................................................................. 30
    Setting your new tab to be your home page ................................................................... 31
    How to remove a personalised tab from tab bar ............................................................ 32

11. Adding content to your personalised page ...................................................................... 33
    Adding links to online material using Cognos Utility/Bookmarks Viewer .................. 33
    Adding links to online material using Cognos Utility/HTML Viewer section ............ 34
    Adding a report parameter using IBM Cognos Viewer .................................................. 36
    Adding IBM Cognos Navigator ..................................................................................... 39
    Notes ............................................................................................................................... 39

12. Creating a Grants Enquiry portal page ......................................................................... 41
    Accessing the PI report ................................................................................................... 41
    Drilling down for further information ............................................................................ 43

Appendix A: Standard Cognos reports ............................................................................. 45
1. **Computing settings for Cognos users**

**Browser settings**

- Pop ups and Java Script must be enabled.
- You may need to make the following URL a trusted site:
  
  https://admin-reporting.cam.ac.uk/prod/ibmcognos/cgi-bin/cognos.cgi

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.

  ![Internet Options Security Tab](image)

- Add the URL by pasting it in the **Add this website to the zone**: text box and click on the **Add** button.
- **Close** and **OK**
- You will then need to re-boot your machine after doing this.

**Signing in to Cognos**

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

Prior to signing in, the online **Cognos Access Request** form must be completed:

**URL**: https://ufs.admin.cam.ac.uk/ufs-and-cognos-user-registration-amendments
(Finance Division > UFS > Quick Links > UFS/Cognos User Access Requests)

**NB**: For Grants, Cognos uses the CUFS responsibility to ensure data security. Therefore, your key contact needs to request a Grants CUFS responsibility is set up or you will not be able to view any data within the reports. Please contact the **FSG Finance Reporting** team, fsq.system.support@admin.cam.ac.uk if there is a reason why your department does not want you to have a CUFS live responsibility.

Open your web browser (Internet Explorer recommended for CUFS and Cognos) and navigate to the **UFS** home page: https://ufs.admin.cam.ac.uk/
Click on the Cognos login link to open the Raven Authentication page.
- In the User ID field, enter your CRSID and your Raven password.
- Click OK and the IBM Cognos Connection application opens in your browser.

**Signing out of Cognos**

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

**Moving to another Department?**

If you are moving or have moved to another department, you will need to complete the same online form as above to ensure that your Cognos access is amended accordingly. Don't forget to amend your email address in the CHRIS employee self-service, [https://chris.cam.ac.uk/hr_live_ess/](https://chris.cam.ac.uk/hr_live_ess/) and University Lookup Directory, [https://help.uis.cam.ac.uk/service/collaboration/lookup/change](https://help.uis.cam.ac.uk/service/collaboration/lookup/change). You access your own page using this link: [https://www.lookup.cam.ac.uk/self](https://www.lookup.cam.ac.uk/self).
2. What should I see when I log in?

Once you have logged into Cognos, the Public Folder page will be the default home page, unless you have modified your settings.

Home page

The Public Folders page will display. Always use the Log Off button when ending your Cognos session, and then close the browser.

There are various buttons on this page, which will assist you when navigating Cognos, particularly Home and My Area Options.

<table>
<thead>
<tr>
<th>The Icon</th>
<th>The Name</th>
<th>The function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>My Area Options</td>
<td>Enables you to set up output preferences and review any reports you have scheduled. Refer to Section 3.</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. To check your access, in the Public Folders tab, click on:

- the LIVE folder > your school folder > Departmental (Shared) Reports folder

You will have access to either the Grants Reporting folder, GL Reporting folder or both, depending on what you specified on your access form. The General Ledger (GL) reports were rationalised in 2019, and the current reports are NOT in the GL Reporting folder, but appear directly in the Departmental (Shared) Reports folder.
Reports in the Departmental (Shared) Reports folder are the standard General Ledger or Grants reports that are available to all Cognos users, regardless of school or department. If you use your specifically named departmental folder instead, the reports will be unique to that department.

If you are unable to view 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.

Grants reports

The standard Grants reports are available from the Departmental (Shared) Reports > Grants Reporting folder. In some cases, widely used reports may also be in the Grants Reporting sub-folder, Other.

General Ledger reports

The current standard GL reports are available from the Departmental (Shared) Reports folder. You do not need to open the GL reporting folder unless you are looking for old reports.
Action icons

These appear on the right hand side of the Cognos application. The available actions are dynamic and number of options will vary. The most frequently used actions are:

<table>
<thead>
<tr>
<th>The Icon</th>
<th>The Name</th>
<th>The function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Set properties</td>
<td>In My Folders tab, use to change the name of folders and reports using General tab. The Report view tab allows you to set output options and parameters.</td>
</tr>
<tr>
<td></td>
<td>Run With Options</td>
<td>Allows you to check/change output and input parameters. Advanced option enables you to run it a specified time.</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 all other options, as well as the above</td>
</tr>
</tbody>
</table>

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

[Image of action icons and more options menu]
3. **My Area Options: Setting preferences**

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 function 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
- **Separators in list view:** Alternating backgrounds means lines are shaded and not shaded so easier to follow across
- **Report Format:** Amend to your preference. Recommend **PDF**.
- **Untick 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.

My Activities and Schedules

You can also use My Area Options to check your scheduled reports using the relevant choice.

TIP: Disabling the schedule is useful for periods you are away and want to avoid cluttering inbox, but don’t want to have to set it up all over again on your return. Don’t forget to enable on return!
4. Customising Cognos using My Folders

Cognos allows you to personalise your view/use. This functionality can save considerable time. The simplest way to utilise this is to set up your own folders under the My Folders tab. This is your personal filing system and you need to set it up to suit your own individual reporting requirements. Once you’ve set this up, you may wish to make My Folders your landing or home page. This saves having to change tabs every time you log in.

Creating a new folder

Navigate to the My Folders tab and click on the New Folder icon.

Manually enter a folder Name, e.g. GL Monthly Reports/Prof Blogg’s reports

Ensure that My Folders has defaulted in Location. If not, select it.

Once fields have been completed click on Finish and the folder will display. You are now ready to add your reports, either by using shortcuts or copy. (Refer sections 7 or 8)

Description and Screen tip fields are optional.

You can create subfolders under other folders, but all personalised changes must be stored in My Folders.

NB: Ensure that the Location setting is correct.

To change the order of your folders and reports, use the Order icon.
Organising tabs/landing page

Changing the order of the tabs allows you to set your landing page. It also means that when you click on the Home button, you will be taken to this page rather than the Public Folders tab. This saves you having to navigate your way back to the GL or Grants reports in Shared folders.

- Click on the Tab Menu button

- Select Modify the sequence of tabs ....

When this screen displays:

- Click on My Folders
- Click Up (whichever tab is at the top of the list becomes the home page)
- Click OK

My Folders is now the home page.

Alternatively, you can use the Portal Tabs within My Area Options > My Preferences.

**NB:** If you create your own home pages (Section 10), or add the PI Grants Enquiry tab (Section 12), you will be able to modify the sequence further. Whichever tab is at the top of the list becomes the home page.
5. Finding and running reports

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, unless notified otherwise.

Finding the reports

The majority of reports are available from the Live > School > Departmental (Shared) Reports folder.

By following the above path, you can either run the GL reports or open the Grant Reporting folder to access the grants reports. If you select your department named folder you only will find bespoke 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 set the report output format, eg. PDF or Excel, and delivery, i.e. view the report, print the report or email it.

NB: If you click on the report name to run it, you bypass the Run options. It is recommended that you use the blue arrow in case a report was mistakenly saved with another user’s parameters or is set to Print.


Usually select View the report now, and can select Send me the report by email, but this choice can also be made once the report has run.

By clicking Run, the parameters for the relevant report selected will display for you to complete.
Report parameters

Every Cognos report requires the user to select various options in order to achieve the desired output. These selection options are unique to the report selected and their position is dependent on the report designer. Ensure you read the header for each selection box before completing, i.e. Project number vs Award number, Project Organisation vs School or Department, Item date vs GL date.

A red asterisk next to a field selection box indicates completion of this field is mandatory.

Until the mandatory field(s) is/are completed, the Finish button at the bottom of the report is inactive, i.e. greyed out.

NB: The Finish button is NOT always on left! Check before clicking to avoid cancelling your report.

Some of the selection boxes require the previous box to be completed before clicking on the Update field button. This action populates the subsequent box with appropriate data. For example, if the Financial Year is selected, when the Update GL Period List button is activated, only the GL periods (months) for that specific year are then listed in the GL Period selection box. Using this function makes the selection process easier, e.g. If the department is selected, then the cost centre list updated, only the cost centres that belong to the selected department are listed.

Before Year selected and list updated:

![Before Year selected and list updated]

After Year selected (19-20) and list updated:

![After Year selected (19-20) and list updated]

Making use of this selection function is optional, as are all selection fields, unless there is a red asterisk. You do NOT need to complete all selection boxes. Depending on your responsibilities, you may only be able to see one department or only one cost centre. In these cases, the selection options are much more limited than a person who has the whole school responsibility.
Another type of selection that you may need to use requires that you complete the appropriate box, then move the resulting item to the choice field. You cannot type the item directly into the Choice box.

Until you populate the Choice box, the mandatory field is not activated.

**NB:** If you want more than one choice, you need to insert each time from the keyword > result, as a new keyword/result overwrites whatever is in the Results field.

Repeat selection of keyword and insert action as required

Once there is a least one item in the Choice box, the dotted line under the box disappears. This indicates that the mandatory requirement has been met.

Click Select all if more than one choice

Use the Remove button to delete items from the Choice box.

**NB:** If using the re-selection/change parameters function, don’t forget to update these choices if necessary.
Running a report in PDF format

If you have selected PDF as your report format option, the following icons, which display at the top right of the screen after your report runs, are useful:

<table>
<thead>
<tr>
<th>The Icon</th>
<th>The function</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Returns you to the list of reports.</td>
</tr>
<tr>
<td>🎁</td>
<td>Enables you to change the parameters without starting from scratch</td>
</tr>
<tr>
<td>🎥</td>
<td>View report in other formats, including Excel (refer to section 5, Converting a PDF Report to Excel).</td>
</tr>
<tr>
<td>📌</td>
<td>Creates a shortcut to report or adds to browser (refer to Section 7)</td>
</tr>
<tr>
<td>💌</td>
<td>Emails the report</td>
</tr>
</tbody>
</table>

NB: To email report to a colleague, use their full email address, e.g. jb123@admin.cam.ac.uk. Select option to attach report instead of providing link.
Converting a PDF report to Excel

If you have run a report and would like it in Excel format instead, you can easily convert it from PDF to Excel.

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

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

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

4. An Excel page opens with the report contents, usually one tab for information on selection choices and another with the data.
6. Creating shortcuts and bookmarks

You are able to create shortcuts and/or bookmarks to both folders and reports. Shortcuts are stored within your own folders, and you can create as many shortcuts to the same report or folder as you need to populate your folder setup. Bookmarks are stored in your browser’s Favourites folder.

Creating a report shortcut

- From the Public Folders screen, navigate to the report you wish to create the shortcut to. Click on the More … action button

- The Perform an action screen displays.

- Click on Create a shortcut to this entry ...

- Ensure a location for the shortcut is saved.

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

**NB:** If you have set up other folders under **My Folders**, you can choose **Select another location** again, and then choose the appropriate folder where the shortcut should appear.

*Click OK* when you’ve selected the folder.

• **Click Finish**

The last page that was viewed in Cognos will display, usually this is where you selected the report i.e. Public folders.

• Navigate to **My Folders** tab, or to the folder that you selected, to view the shortcut. Click to run report. As this is a shortcut, any updates to the report are included whenever you run report from this link.

**Tip:** Don’t forget to make the **My Folders** tab your default **Home Page** by modifying the sequence of the tabs. Refer to Section 4.

### Creating a shortcut to a folder

You are also able to create a shortcut to a whole folder if required. Instead of selecting an individual report, select the folder. The rest of the procedure is as above.
Creating a shortcut to a report after running it

When a PDF report is displayed on the screen, you have the option of creating a shortcut to it for future reference. Click on **Add this Report** then **Add to My Folders**. Then follow procedure detailed above.

You are also able to use this link to create a bookmark via **Add to My Bookmarks** (See section below.)

**NB:** Shortcuts do NOT retain your parameter selections. (See Section 8, Report View for this functionality)

Creating a bookmark

You can bookmark an entry in your Web browser so that later you can quickly perform the default action associated with the entry. For example, using a report bookmark, you can view the most recent report output or run the report. The bookmark saves the URL of the entry and its default action at the time when the bookmark was created. When using a bookmark link, you will still need to log into Cognos.

- From **Public Folders**, navigate to the report (or folder) you wish to create the bookmark to:

  - Click on the **More…** action button and the **Perform an action** screen displays
  - Click on **Add to bookmarks…**

  This enables a link to be created in your web browser.

**NB:** If you have created a bookmark, you still need to log onto Cognos once you have clicked on the link. Once, logged in, you are taken to the parameter screen of the report.
7. **Copying reports**

The report copy function MUST be performed before a Report View or Schedule is set up. It is recommended that you create a specific folder in My Folders. For purposes of this guide, **My Copied Reports** is used. You can make as many copies of a report as you require.

**NB:** Ensure you differentiate copied reports from reports to which you have made a shortcut. The best way to do this is CHANGE the name of any copied reports, and LEAVE the default naming Shortcut to for shortcuts.

You **cannot** schedule or set up a Report View from a shortcut.

### Copying reports for scheduling

- Navigate to the report that is to be copied and **click in the box** on the far left of the report name.

- Click on the **Copy** icon. (Nothing happens at this point - the report has been copied to clipboard.)

- Click on the **My Folders** tab and then the **My Copied Reports** folder, to indicate where to put the report.

- Click on the **Paste** icon (which is next to the Copy icon).

- The copied report is now available to either set up saved parameters (Report view) or to schedule.

**NB:** Change the name of the copied report (using Set Properties action) – you need to know what parameters you have saved on this copy of the report for future reference.
8. Setting up a Report View

Cognos provides the functionality of being able to save your parameter choices for any of the reports. This is useful if you always choose the same department(s), cost centre(s) or source of fund(s), or regularly need to run reports for a specific purpose (e.g. selected/individual CCs or PIs).

Creating a Report View

A report view is a copy of a report that is stored in your personal folders. A report view can be set up so that associated prompt values can be pre-selected and saved with the report view. It is also possible to schedule and run this report view using those values.

**NB:** You must always make a copy of any report before saving your own parameters

1. Create a copy of the report and paste it into one of your folders

   - From Cognos Connection, tick the report you want to copy, and click on the Copy command in the tool bar, top right of screen.
   - Open (or Create then Open) the folder where you want to store the copied report.
   - Click on the Paste command

   ![Image of folder and copy options]

   - Alternatively, click on More... beside the selected report, and select Copy

   ![Perform an action - GL: Financial Summary]

   **Perform an action - GL: Financial Summary**

   **Available actions:**
   - Set properties
   - View report output versions
   - View my permissions...
   - Run with options...
   - View the schedule
   - View run history
   - Alert me about new versions
   - Copy...
   - Create a shortcut to this entry...
   - Add to bookmarks...
   - Cancel
2. Set up the defaults for the report

- Rename the report. You can do this now or later after the report view has been set up (Set Properties action).

- Set Location by clicking on My Folders. If applicable, Select another location and navigate to appropriate folder.

- Click OK to finish

- Go to the folder you specified (either method)

2. Set up the defaults for the report

- Navigate to the copied report in order to set up your own parameters. These will be stored as this “view”.

- Select the relevant report, and click on More…

- Click on Set properties and change the name of the report if you haven’t already done so. Use the General tab to do this.
• Click on the **Report view** tab

**Set properties - GL: FinSum Dr Bloggs CCS**

<table>
<thead>
<tr>
<th>General</th>
<th>Report view</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type:</td>
<td>Report View</td>
<td></td>
</tr>
<tr>
<td>Owner:</td>
<td>crs02</td>
<td></td>
</tr>
<tr>
<td>Contact:</td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

In **Default action** section
• Select **Run the report** (but may use the other action for Bookmarks)

In **Report options** section
• Tick **Override the default values** to see options available
• Select **Format** (PDF or Excel 2007)

In **Prompt values** section
• Click **Set** to select the default prompt values

*The report’s parameter selection screen appears*
• For each relevant option, select your desired values. Ensure all **mandatory** fields are completed.
• Click **Finish**

• Your selection now appears under Prompt values instead of No values saved. These values can be changed at any time by clicking on Edit… or removed completed by using Clear.

**NB:** It is not advised that you uncheck the **Prompt for values** box as you may want to change a selection periodically, eg. GL period or transaction date. If you leave the box checked, the parameter selection page appears each time. Your saved selections will default, but this gives you the opportunity to change one or more of the values, if required. Either make your changes or click **Finish** immediately.
3. Click OK to finish setting up the report view.

You can create multiple report views of a single report each with its own separate report options - copy the report each time, and rename appropriately!

Scheduling a report with report view set up

You can set the report view to run unattended on a predefined schedule.

- Select the report, click on the Run with options icon (on right)

- Click on advanced options in the upper right of the screen

- Click on Run in the background. The default is Now so you need to change to Later, and choose the date/time required

- Options will be displayed for Formats, eg. running the report directly to Excel, or Delivery, eg. printing or emailing the report

- If you want to change the prompt values that are used in the report view, click on View all under the Prompt values section, but if the Prompt for values box is ticked, you can still change these after you click Run

- Click on Run when completed
9. Scheduling a report

NB: You must always make a copy of any report before setting up a schedule.

Scheduling reports is very useful if you would like to run the same report/s on a regular basis or have a report delivered to a colleague whilst you are away. However, if it is a report that has date parameters, then the updated parameters have to be completed each time before the scheduled report runs.

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

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

   Tip: Schedule to run reports after 9.30am to be sure the overnight build has completed

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

   The Option selections are not visible until the Override box is checked.
You have the option to:

- Set the format output
- Default the delivery method whether it be save, print or email. Email is the recommended option. Remember to use the full email address if sending to a colleague.

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

Click on **Set...**

5. The report parameters screen displays, and needs to be completed. *Remember to complete these parameters before you schedule the report.*

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

6. .Click OK when you’re ready. Your report is now scheduled.

**Changing a schedule**

These parameters can be changed at any time by selecting the scheduled report, clicking on **Schedule** action. Alternatively, use **Modify the Schedule...** in the **More...** action. Make changes in the appropriate sections.

**Removing/disabling 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**. If you want to suspend the schedule for a period, but not delete it, tick **Disable the schedule** on the **Schedule Listing** screen.
Viewing a schedule if delivery option *Save the report selected*

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.
10. Creating a Personalised Page (Tab)

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

1. Click the **New Page** icon to display the screen below. 
   *If you are in My Folders when you do this, the Location is defaulted correctly.*

2. Complete the **Name** field. *This will be the name of your tab/page. You can change this by using the Set Properties action.*

3. If not already selected, click **Select My Folders**. Check **My Folders** appears 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.
To customise each column, click **Add** at the bottom of the relevant column and the following screen will display.

**IBM Cognos Content:**
Use this to create links to reports you use on a regular basis

**IBM Cognos Utility:**
Use this to set up links to documents and web pages.

**At this stage, you must select the type of material for your homepage. You need to choose whether to include IBM Cognos Content (reports) and/or IBM Cognos Utility (links, documents, webpages). Actual content is added in a separate exercise.**

### Creating an IBM Cognos Utility section

- Click on **IBM Cognos Utility** and the **Select portlets (Navigate)** wizard displays.

To **differentiate** sections, you need to add the relevant portlet **as many times** as you want sections.

- **Bookmarks Viewer:** Use this to include **link** to page or document, eg. reference guide, chapter in Finance Procedure Manual, department contacts list. You are creating a bookmark on your page.

- **HTML Viewer:** Use this to create a link to a document or webpage that displays inside your homepage.

In the **Available entries** section (left), tick the box next to the **Portlet** required, then use the **Add** (yellow arrow) to move it to **Selected entries** on the right. (You can tick the entry and click **Remove** if you change your mind.)

The order doesn’t matter as you can re-arrange later.

In the example above, your page will have two different sections of links, an embedded webpage or document, another section of links and lastly an image. Each time you add a portlet, you will be able to include a header for that section.
Example: To illustrate two Bookmarks Viewer portlets added, with different content in each section:

![Image of two Bookmarks Viewer portlets]

Example: To illustrate using Bookmarks viewer vs HTML viewer

![Image of Bookmarks viewer and HTML viewer]

**NB:** Do not set up a link to CUFS on your home page.

Setting up a link to CUFS results in an automatic re-routing to the CUFS log in screen. CUFS overrides Cognos and means you are locked in a loop. To access Cognos again, a call must be raised with the helpdesk.

- Click **OK** at the bottom of the page and **Set the columns and layout** screen displays. The portlets you selected are displayed in the appropriate column. If you chose a 2 or 3 column layout, you need to repeat the selection for the other columns. You can add or remove portlets at any stage. The yellow up and down arrows on the right of the column allow you to re-order the portlets.
Creating an IBM Cognos Content section

This is the other type of material that can be added to your homepage and is used to add Cognos reports, as well as Public folders and My folders.

- Click on IBM Cognos Content, and the Select portlets (Navigate) wizard displays
  - IBM Cognos Viewer: Use to display the report parameter screen of a selected report directly on your Homepage.
  - IBM Cognos Navigator: Use this to include Public Folders and My Folders

Example of Cognos Navigator

To include either of the Viewer or Navigator content, in the Available entries section (left), tick the box next to the Portlet required, then use the Add (yellow arrow) to move it to Selected entries on the right. (You can tick the entry and click Remove if you change your mind.)

The order doesn’t matter as you can re-arrange later.

As with the IBM Cognos Utility, add the relevant portlet as many times as you want sections

In the example above, your page will have a section headed IBM Cognos Navigator, containing Public Folders and My Folders, and then three actual reports.

Example: To illustrate two Content Viewer portlets added, with a different report in each section:
When finished adding this type of material, click OK at the bottom of the page and Set the columns and layout screen displays. The portlets you selected are displayed in the appropriate column. The yellow up and down arrows on the right of the column allow you to re-order the portlets.

The next section applies to either creating IBM Cognos Utility or Content portlets on your own page

If you chose a 2 or 3 column layout, you need to repeat the exercise for the other columns, starting with the decision whether to use the Cognos Utility or Content portlets. You can add or remove portlets at any stage. When ready, add your new page to your portal tabs. At this stage you have designed your page but still need to add actual content (i.e. make the links). Your page will NOT look like the examples above until you have added the content.

Example of new page with no content added

Adding the new page as a portal tab

Once you have decided on the number of columns, the type of material to be displayed in each, and set up the backbone (as illustrated above), there is another choice to be made. You can either add the content (jump to Section 11) and then add the new page as a portal tab, or add it now, and add content afterwards.

Select the page you want to add to the portal tabs, under Actions (right), click on the Add to my portals tab.

You can also change the name of the page, and create a title at the top of the page by using Set properties under Actions.

- Change the name of the page in the General tab
- Add a title in the Page Style tab
- Change the font style, colour and size by clicking on Custom
Example of new page with a title

- You can also change the Layout and Content using the appropriate tab, although this can also be achieved using the Edit icon on the page itself.
- Click OK when changes have been completed.

You may want to set your customised tab as your home page. This means that this will be page displayed when you log in, or when you click on Home.

Setting your new tab to be your home page

- Click on the Tab Menu icon (far left)

NB: If the page is not yet added to the tabs at the top (with Public Folders and My Folders), under Actions (right), click on the Add to my portals tab.

- Select Modify the sequence of tabs… from the list
• Click on the page you created e.g. *My Homepage*, or whichever one is to be your landing page.

• Click *To Top* (whichever tab is at the top of the list becomes the home/landing page)

• Click *OK*. Your personalised page is now the home page.

*If you haven’t done so already, the next step is to add content to the new tab. Refer to Section 11.*

**How to remove a personalised tab from tab bar**

• Ensure you are on the tab you wish to delete and click on the *Tab Menu* icon

• The following options will display.

  Click on *Remove this tab*.

  The selected page will no longer *display* as a tab but remains in *My Folders*.

*If you’re sure you will never use the page again, you can delete it from My Folders.*
11. Adding content to your personalised page

Having prepared the layout of your personalised page, you need to populate it with your selected content. Content cannot be added unless the layout is already set up. Refer to Section 10. The layout can be edited at any time to add or delete types of viewers, or change the number of columns.

To change layout: select the page to be edited, then click on Edit this page…

Alternatively, go to Set Properties, and choose the Layout and Content tab

Adding links to online material using Cognos Utility/Bookmarks Viewer

Use this to create links to webpages. Useful for frequently required guidance or other reference material, e.g. a section from the Financial Procedures Manual.

- Select the page you want to add content to. Each section you have set up on your layout has an Edit function. Work through the sections one at a time, using Edit.

- If you are adding content to a section where you placed a Bookmarks Viewer, you now need to add the web links (URLs)

  ![Bookmarks Viewer Screenshot]

  - Add a Title for that section (meaningful description of what the section contains)
  - Copy and paste the relevant URL link/s into separate rows
  - Use the Aliases field to give a name to the link. If left blank, the URL displays instead
  - In Open Links section, leave the default setting In a new browser window
  - Click OK when finished adding URLs
You can have as many or few links as you require. Use Add a bookmark line if necessary

Example of completed content setup

Adding links to online material using Cognos Utility/HTML Viewer section

- Select the page you want to add content to. Each section you have set up on your layout has an Edit function. Work through the sections one at a time, using Edit.

- If you are adding content to a section where you placed a HTML Viewer, you now need to add the web link (URL). Using the HTML Viewer means the actual webpage displays inside your page, so you only have one URL per HTML section.
**NB:** There is an issue with Cognos displaying **https** webpages in the Viewer. If it is a University of Cambridge web page, you may need to be logged in with Raven before you open Cognos. Links to PDF documents seem to work with no problems.

- Add a *Title* for that section (meaningful description of what the section contains)
- Copy and paste the relevant URL
- In *View Options*, set the height of the section
- Click **OK**

**Example of completed content setup**

![HTML viewer setup](image)

**Example of section (HTML viewer) after content added**

![Map of University of Cambridge](image)
Adding a report parameter using IBM Cognos Viewer

- Select the page you want to add content to. Each section you have set up on your layout has an Edit function. Work through the sections one at a time, using Edit.

- If you are adding content to a section where you placed an **IBM Cognos Viewer**, you need to add the link to the report to be displayed. Using the **Cognos Viewer** means the actual report displays **inside** your page, so you only have one URL per **Cognos** section.

![IBM Cognos Viewer settings](image)

- Add a **Title** for that section (suggest report name)
- In **Entry**, use **Select an entry…** to give the path of the relevant report

![Select an entry dialog](image)

- In **View Options**, set the height of the section
- Click **OK**

**NB:** If you want the report on your personalised page to have preset parameters, ensure you make the link to the **report view** copy you have set up in **My Folders**.

**Example of completed content setup**
You need to make some further choices as to how the report will display/run from within your page. Use **Report Properties** in the **Entry** section:

In the **Fragment Action**: section, you must decide what action controls the report. This is dependent on your usage. **Show a run action** is the most flexible, alternatively **Run the report**.

In the **Prompt the user**: section, your choices are:

- **Every time**
- **Only when required parameter values are missing**

Which choice you make depends on your requirements. **Every time** means you can change or add your selection each time before the report runs. If you choose **Only when required parameter values are missing**, the report runs using the values setup in the report view when you linked the report, unless you’ve linked the report from **Public Folders**, i.e. no parameters set.
At the bottom of the Set properties is View Options. Ensure Show Toolbar is enabled, Normal mode recommended. This ensure the usual Cognos options are available, such as exporting to Excel, emailing report and changing parameters.

Example of section (Content viewer) after content added if Show a run action is selected

Example of section (Content viewer) after after blue run arrow clicked, with Every time set in Report properties

You would now make your selection, or change any parameters if using Report View, then click Finish as usual when running a Cognos report.

The report displays within your page.

Example of section (Content viewer) after parameters selected, with Normal Mode toolbar
Tip: Once you have run a report on your personalised page, click on Refresh to clear the report from the screen.

Adding IBM Cognos Navigator

- If you are adding content to a section where you placed an IBM Cognos Navigator, you need to link to the Cognos folders to be displayed. Using the Cognos Navigator means these folders display inside your page, so you can choose reports from either the Public Folders or My Folders.

  The Cognos setup at this university defaults so both folders display in the Navigator section automatically.

Example of Cognos Navigator section

Notes

- You can Edit or Refresh any of the sections at any time, using the buttons at the right of each section.

- If you want to add/delete sections, or change layout of the page, you must use the page Edit button
12. Creating a Grants Enquiry portal page

Within Cognos you automatically have a Public Folder and a My Folders tab set up.

If you are using Cognos for running Grants reports then it is recommended that you add a Grants Enquiry tab to your layout.

A Grants Enquiry tab is useful as it enables grants administrators to quickly run an enquiry based on the Principle Investigator (PI). It shows all awards for that PI so does not require the award or project number. This tab mimics the information that (PIs) see if they have Cognos access.

Accessing the PI report

- Having logged in, go to Public Folders, click on the LIVE folder link.

- Click on Page Tabs folder

- These options are displayed.

- Tick the box Grants Enquiry.

- To add this to your Cognos pages/tabs, click on the Add to my portal tabs.

- Another tab (Grants Enquiry) appears.

- Click on this tab. A pop up regarding secure content appears. Choose Show all content.
To access the PI reports, click on the **Reports** tab.

Click on **PI Grants Enquiry** (use **PI Grants Enquiry – mac**, if accessing from a Mac machine)

**NB:** This portal tab can also be used to run the **Grants End Date** enquiry. Select appropriate enquiry.

Select your department code from the drop down list, scroll to the bottom of the page and click **Finish**.

A list of all PI names for the selected department is displayed.

Click on the name to access the summary view their awards.
This list view is dynamic. The awards linked to the selected PI name displays in the right hand frame. The list of names remains on the left. Click on another P’s name to re-select.

- The budget and expenditure figures are **cumulative** from the start of the award to the last update of the datamart. This is important to remember when checking actuals and commitments for the PI.

**Clicking on any of the hyperlinks (blue underline) allows you to drill down for further information.**

### Drilling down for further information

Further information available:
- A summary view of expenditure categories, including budget
- Expenditure by type
- A list of individual (line by line) expenditure items and commitments

- Once the PI is selected, click on the **Award Number**. This takes the information down from the summary view to the Detail view, which includes attached **Projects**, split by **Task number and Expenditure Category**, including budget, expenditure, commitment and funds available for each Expenditure Category.

- The **Details** view appears underneath the **Summary** view, in the same frame. It also includes the **Start, End and Close** dates of the **Award**.

- To drill down further, click on the hyperlinked **Award Number**

**NB: To get to the line by line expenditure/commitment list, you need to click on the hyperlinks in this order!**
The next level down opens in a **new** tab in your browser and should be closed after viewing. *Cognos remains open on the PI Grants Enquiry tab, with the summary and details information on display.* Ensure you **don't** close this tab until you are ready to log off from Cognos.

All Cognos functionality is available and you can export the information to *Excel* if required. At this level, the *Expenditure Type* is now included, as well as the commitment number, if applicable, but the budget is no longer displayed.

To view the line by line information, click on the hyperlinked **Project Short Code**. Again, the result displays as another tab in your browser, with all Cognos functionality.

**Example of result, exported to Excel**

*NB* If you **don’t** export to Excel, you need to use the controls at the bottom of the screen display to view all the tasks/lines.

If a project or an award is NOT showing for a PI, it is either because the PI has not been named as the key member in the grant set up, or the award is not owned by the selected department. In the former case, the PI may still be showing as “PI not yet on CHRIS”. In both cases, contact your ROO adviser.
## Appendix A: Standard Cognos reports

A summary of the standard reports in Cognos is listed below. Further detailed guidance on the reports that can be run for Grants and General Ledger within Cognos, is available on the UFS Home Page > Training > Documentation & FAQs > Cognos > Quick Reference: Standard Cognos Reports Available, or via the link [http://www.finance.admin.cam.ac.uk/training/docs/cognos](http://www.finance.admin.cam.ac.uk/training/docs/cognos).

<table>
<thead>
<tr>
<th>Cognos Folder</th>
<th>RESEARCH GRANTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared</td>
<td><strong>Grants by Sponsor Type (with budget)</strong>&lt;br&gt;This can be run by Department or multiples (dependent on access), Sponsor Type or multiples (optional), Award Status also multiple (optional), Sponsor Name or multiples (optional). The report returns the following information, excluding commitments and Budget.</td>
</tr>
<tr>
<td>Shared</td>
<td><strong>Project Enquiry</strong>&lt;br&gt;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).</td>
</tr>
<tr>
<td>Shared</td>
<td><strong>Projects by Organisation by PI</strong>&lt;br&gt;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.</td>
</tr>
<tr>
<td>Shared</td>
<td><strong>Research Council Statement School/Department version</strong>&lt;br&gt;This report provides administrators with a listing of all the different types of Research Council Grants that are held within their department.</td>
</tr>
<tr>
<td>Shared</td>
<td><strong>Award expenditure by Project Org All expenditure types year summary level</strong>&lt;br&gt;Allows selection of more than one project organisation. Lists total of expenditure by Expenditure Type per year, starting 2007/8, subtotalled by Sponsor Type. Best run in Excel. This report also has two further worksheets/tabs that show the expenditure for the selected project organisation either by Award Number or by Project Number.</td>
</tr>
<tr>
<td>Shared</td>
<td><strong>Award expenditure by Project Org by year</strong>&lt;br&gt;A useful summary for checking overhead/indirect costs per sponsor type, by year, beginning 2007/8. One or more project organisations can be selected. Run in Excel to show all columns on one page.</td>
</tr>
<tr>
<td>Shared</td>
<td><strong>Grants Expenditure by Month</strong>&lt;br&gt;This can be run for a single grant or multiple grants, using the RG number and for a specific date range. The report returns each grant details on separate page, with total expenditure for month excluding PO commitments.</td>
</tr>
<tr>
<td>Shared</td>
<td><strong>Top Slice postings by Project Organisation</strong>&lt;br&gt;(Not used since 2011) 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.</td>
</tr>
<tr>
<td>Shared</td>
<td><strong>Year End Grants (by date range)</strong>&lt;br&gt;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 as a preview. The report&lt;br&gt;- picks up grants that have been ‘Open’ in the current year&lt;br&gt;- shows total actual ‘burdened’ costs analysed by expenditure type&lt;br&gt;- includes data across all tasks (including Tasks 99 and 100)&lt;br&gt;- for the current year, will provide cumulative totals to date</td>
</tr>
</tbody>
</table>
**Shared Information**

**Activated grants with budget**
This can be run for a single department or multiples (dependent on access). Selection by a single Sponsor Type or multiples is also available. The report shows all grants that have been activated in the period selected by Creation Date. Included in this report: Award Number, Project Number, Sponsor Type, Name and Number, Funding Reference, Award Title, Award Start and End dates, Payment Type, Award Status, Award PI Name, Indirect Budget, Direct Budget, Total Budget, Award Purpose and Creation Date. (NB: In some cases, the Creation Date is after the Award End Date.)

**Other**

**Actual expenditure (Billing) final**
This report shows expenditure against a specific award/s by transaction or GL posting dates and is useful for reviewing final expenditure against Form Cs and the Final Expenditure Statements (FES). It provides detailed information such as Expenditure Category, Type and Comment, GL Period, Transaction Date, Invoice Number, Supplier Name, Payroll ID, Task Number and Amount.

**Actual expenditure (Billing) totals**
As above, but report subtotals each expenditure type.

**Other**

**Detailed Expenditure Enquiry by Project**
As the name suggests a detailed listing of all expenditures charged to a project from CHRIS, 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

**Shared**

**Grants Actual Expenditure by Project Org**
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.

**Shared**

**Overheads by dept by year**
Allows selection by single or multiple departments, as well as Award status. Preferred format Excel. This report produces four worksheets/tabs, with **indirect costs** summarised by project short code, cost centre, project organisation, PI. The totals for each fiscal year are shown from FY 2012-13.

**Shared**

**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.

**Shared**

**3-2-1 Grants Ended Enquiry Details**
Provides a list by award organisation of awards ending within a specified number of days, e.g. 90, 180 etc. It does not include any financial information.

**Shared**

**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.

**Shared**

**Grants Ended Enquiry Details**
The report comes in two parts
1. A summary page of all the awards ending on that date
2. A detailed page for each award, by project and by task number.
Cognos Folder | GENERAL LEDGER
--- | ---

**GL Financial Summary Report:**
This report has replaced the previous suite of reports. It provides a top-level overview of your departmental accounts by source of funds and/or cost centres.

Obtain an overview of how the department/school is running. Can be used to monitor balances of all sources of funds/cost centres within a department. This report allows users to customise the output to suit their requirements and includes Cost Centre Analysis, if required, as well as an income and expenditure breakdown.

It is suggested that a user Report View be set up in Cognos for regular use of this report as selecting parameters can be time consuming.

**Default display:**
- Source of Funds Code
- Source of Funds
- Annual Chest Allocation
- Balance b/f
- Income YTD
- Expenditure YTD
- Surplus / Deficit
- Overdrawn / Cash in Hand
- Money on Deposit
- CUEF
- Other Investments
- Total
- Balance Sheet Entries
- Reconciliation to UFS
- Revaluations in Year

**Additional outputs:**
- Can select Summary Field values for:
  - Summary Field 2
  - Summary Field 2 Description
  - Summary Field 3
  - Summary Field 3 Description
  - Summary Field 4
  - Summary Field 4 Description
- Can select Show Cost Centre Analysis for:
  - CC Analysis Owner
  - CC Analysis Owner Full Name
  - CC Analysis Category 1
  - CC Analysis Category 2
  - CC Analysis Category 3
  - CC Analysis Category 4

Select **Show 'Wide' Income and Expenditure Breakdown** for:
- Income – Chest Allocation
- Income – Interest & Dividends Rec’d
- Income – Other
- Expenditure – Stipends
- Expenditure – Stipends Casual
- Expenditure – Wages
- Expenditure – Scholarships
- Expenditure – Non Pay

**GL: Budget to Actual Summary**

Gives a similar overview as the GL Summary Report, but includes plan columns as well. Can be viewed as Balance Sheet or Income/Expenditure. The user selects the desired output.

**Default display:**
- Cost centre code
- Cost centre description
- Source of Funds code
- Source of Funds description
- Annual Plan Income
- Annual Plan Expenditure
- Annual Plan Surplus/Deficit
- YTD Plan Income
- YTD Plan Expenditure
- YTD Plan Surplus/Deficit
- YTD Variance Income
- YTD Variance Expenditure
- YTD Variance Plan Surplus/Deficit

**Additional outputs:**
- There are a number of other options which can be selected as required. Please refer to the detailed guideline.
The Cognos **GL: Budget to Actual report** provides summary General Ledger posting information. It incorporates the new functionality and financial processes (**Plan upload, Cost centre categorisation**). The plan includes the central Chest budget allocations. Data a day old, as with all Cognos reports.

The report has a variety of optional fields, allowing users to customise the output to better suit their requirements and see information about the current period or YTD vs Annual variances.

In some instances, the total of the Actual column will give a more accurate variance between Income and Expenditure, than the variance column which is totalled on a line by line basis.

**Default display:**

<table>
<thead>
<tr>
<th>Cost centre code</th>
<th>Source of Funds code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction code</td>
<td>Annual Plan</td>
</tr>
<tr>
<td>Plan YTD</td>
<td>Actual YTD</td>
</tr>
<tr>
<td>Variance YTD</td>
<td></td>
</tr>
</tbody>
</table>

Valuable for analysing transactional data. It contains numerous columns and is therefore better suited to running in Excel.