Cognos Introduction



Table of contents

1.	Computing settings for Cognos users	4
	Web browser compatibility	4
	Signing in to Cognos	4
	Signing out of Cognos	5
	Moving to another Department	5
2.	What should I see when I log in?	6
	Team content	7
	Grants reports	8
	General Ledger reports	8
	Useful actions	8
3.	Setting preferences	0
0.	Saving a report format preference	
	My Schedules and subscriptions	
_		
4.	Customising Cognos using My content	
	Creating a new folder	
	Working with folders	
	Deleting a folder12	
	Adding a link	2
5.	Finding and running reports14	4
	Finding the reports14	4
	Running a report	5
	Report parameters1	5
	Exiting the report	7
	Working with a report in PDF format18	3
	Emailing reports	3
	Running the report in the background and email option19	9
6.	Shortcuts	D
	Create a shortcut to a report	С
	Create a shortcut to a folder	
	Move or copy a shortcut	2

	Delete a shortcut	. 22
7.	Copying reports	. 23
	Copy a report	. 23
	Rename the copied report	. 24
8.	Report View	. 26
	Creating a Report View	. 26
	Working with Report View	. 28
	Deleting a Report View	. 28
9.	Scheduling a report	. 29
	Creating a schedule	. 29
	Editing a scheduled report	. 33
	Disabling or enabling a Schedule	. 36
	Deleting a Schedule	. 36
	Viewing a schedule	. 36

1. Computing settings for Cognos users

Web browser compatibility

Prior to using Cognos Analytics please make note of the following pre-requisites and/or settings. Some of these setting can be administered globally by the relevant IT department (preferably). This ensures that all users will have the same user-experience when using the application.

IBM Cognos Analytics uses the default browser configurations provided by Internet Explorer and Firefox. Additional required settings are specific to the browser.

For Internet Explorer, the following settings are required:

- Allow Cookies
- Active Scripting
- Allow META REFRESH
- Run ActiveX controls and plug-ins
- Script ActiveX controls marked safe for scripting
- Binary and script behaviours
- Allow programmatic clipboard access.
- User data persistence
- Enable pop-ups for the IBM Cognos Analytics server

For Firefox, the following settings are required:

- Allow Cookies
- Enable Java[™]
- Enable JavaScript
- Load Images
- Enable pop-ups for the IBM Cognos Analytics serve

Signing in to Cognos

You need a Raven password. You also require Cognos access which is requested via your key contact.

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,

fsg.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/

CAMBRIDGE	Study at Cambridge	stridge About the University Research at Cambridge		Quick links			
UFS	UFS						
Home Bullitin - Kay I	Contacta UFS Helpe	lesk 🛫 Finance Reporti	ng 🚽 Financial Usars Group	Systems - Technic	cal News		

The Cognos login is on the Home page. Check the dates of the last successful build time for the Datamart before logging in. It is important to note this when running your reports.

Cognos	Datamart name	Status	Last successful build tie
	AP Involve Payments	DATAMART OK	32-AUG-18 01150:00
	AP Invoices	DATAMART OK	32-AUG-10 02/26/58
A CONTRACT OF A	Fee Billing	DATAMART OK	21-AUG-10 18:18:24
Harrison and Street and Stre	tieneral Lodger	DATAMART OK	22-AUG-19 01112:56
inter and	Grants Datament	DATAMART OK	22-AUG-19 04135:03
	828	DATAMART OK	22-AUG-10 05(12)47
	Saley Transactions	DATAMART OK	22-AUG-19 02(16:01
	X5	DATAMART OK	22-AUG-19-04158:49

- Click on the Cognos login link to open the Raven Authentication
- Enter your CRSID and your Raven
 password

10			
M	_		 -
2	brownee		
	1	og in	
(Linear to		of the loss of	4

Cognos Prod11

• Click **OK** and the **IBM Cognos Connection** application opens in your browser.

Signing out of Cognos

 Use the Account icon, select Sign Off at the top right 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 request that your key contact completes 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, and the University Lookup Directory.

To access your own page, use this link: https://www.lookup.cam.ac.uk/self.

2. What should I see when I log in?

Once you have logged into Cognos Analytics, users will see the screen shown in the image below, each numbered icon is explained further below.

🐔 IIIM Cognes Analytica		Webs	17 A	0 A
D mee D, South D Hycaneel DE mee scottert O Recent	Hello, Welcome to IBM Cognos Anal	ytics.		
	88	Ð		

This is where users are able to change setting and preferences, view current schedules and check alerts.

The current home page is a default.

NB: Use this menu to Sign out

		0	8	Ð
A continued	i ty@admin.s	an ec a		
My schedules	and subs	cription		
My preference	e6			
Log my seaalo	in .			
MyInbox				
My Watch Iter	ma			
About	\mathbf{M}			
Sign out				

This is the main **home page** display and will over time show recently accessed reports. The top, welcome, section can be switched off by changing the **Show welcome** icon option.

Show welcome

NB: Switching the Show Welcome off is recommended.

	Mannen S		-
🚝 Hello. Welcor	ne to IBM Cognos	Analytics.	Investore 🗿
Recent			
5	13		6
Year End Grate range)	GL: FinSum CC owner	Grants Enquiry	
04071	And the second s	00	
Last contribut Cherry (1970), 14 cm	Last sumflied 01003/0022_21.00.00	Last docting controlling, by on	

Ð

2



4

In this section, users can:

- search for reports using the Search option,
- view saved personal reports in the **My Content** (*this is the equivalent of My folder in Cognos 10*),
- view shared reports in the **Team Content** (this is the equivalent of Public Folder in Cognos 10)

ଜ	Home	
Q	Search	
0	My content	
۵	Team content	
0	Recent	

+ New

In this section, certain users will be able to access options to create or author reports using **Report** and or **Query Studio**

Team content

This is where the standard University reports are listed.

- Select Team Content from menu on left (See 3 above)
- Navigate to Live, select your school folder, and then Departmental (Shared) Reports to find a standard report

Home	$+ \hspace{0.2cm} \boxminus \hspace{0.2cm} > \hspace{0.2cm} \hspace{0.2cm} E \hspace{0.2cm} > \hspace{0.2cm} \hspace{0cm} \hspace{0cm} \hspace{0.2cm} \hspace{0.2cm} \hspace{0cm} \hspace{0.2cm} \hspace{0cm} \hspace{0.2cm} \hspace{0.2cm} \hspace{0.2cm} \hspace{0.2cm} \hspace{0.2cm} \hspace{0.2cm} \hspace{0cm} \hspace{0cm}$
Q Search	Departmental (Shared) Reports
🗋 My content	EN Institute for Sustainability Leadership 16/01/2015 13:47
😰 Team content	NA Engineering 04/04/2018 08:32
My portal pages	NN School of Technology

• The reports in this folder are the same across all schools.

Access to the reports is dependent on your CUFS responsibility.

Depending on this, you will see one or more of the following:

- The GL Reporting folder. This is no longer used. Instead, standard GL reports are listed directly in the Shared folder.
- The AP Dashboard suite
- The Grants Reporting folder and two Grants reports below the GL ones.



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

Grants reports are in the process of being consolidated. Currently there are two consolidated Grants reports, which are listed directly in the **Department (Shared) Reports** folder, under the GL consolidated reports, as shown above. The rest of 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**.

ŵ	Home	+ 😑 🕉 School of the Biolo Sciences 🕥 Departmental (S Reports Grants Reporting) 🖓 🏌
Q	Search	Foldera
	My content	Diher 03/12/2019 14:00
1	Team content	Reports
	My portal pages	20/10/2020 11:54
0	Recent	Award Expenditure by Project Organisation All expenditure types year summary level 11/02/2020 12:03
0		Award Expenditure by Project Organisation by year (summary level) 23/02/2017 08:12
-	الاردىسى	Retailed Expenditure Enquiry by Project

General Ledger reports

All the GL reports have been consolidated and appear directly in the **Departmental (Shared) Reports** folder. The GL reporting folder will be removed as it is no longer used.

Useful actions

Look for the **ellipses...** (More). These appear on the right hand side of folder and reports and detail all possible actions. These ellipses appear in a vertical line on the **Homepage**, where recently run reports appear as tiles.

Icon/Arrow/Tool	Name	Function
GL Journal Line Details	Action menu	Available Actions from recently run report tile ▷ Run as □ View versions ☆ Share □ Copy ◇ Create shortcut ○ Remove from recent ☆ Properties

о́С			User (CRSID)	Set up preferences (report formats), check scheduled reports,
E Fun as			Run as	Allows you to check/change report output.
	a with CC owner 🕟 um AG with CC owner	8	Name of Run Report	Exit/Close the report that's showing on screen
€ (⊳~	C		Run	Change/re-select parameters once in a report
€ D(~) C		Run	Change report output from within report, i.e. From PDF to Excel
 IBM Cognos Analy Home Search My content Team content My portal pages Recent 	tics Welcome	Sort by Neme Madified Type Order Ascending Obscending	Sort	Arranges the reports/folders in any list, e.g. My content or Team content NB In Team Content , change Sort to Type and Ascending to show LIVE folder near top of list

Setting preferences 3.

You can set your preferred report output as a default.

Saving a report format preference

1. On the Cognos Analytics banner, click on the User icon.

	ļiji!	IBM Cognos Analytics	Welcome	*		\$ <u>(</u> ?)	3
2.	Selec	ct My preferences from the available	options		A crists Creation to Arcs Programmers of Programmers Programmers Programmers About Sign put	••• D R O	
3.	the R	only setting that requires changing her aport Format. Set this option to your onal default preference.	e is	My preferences			

PDF is recommended particularly when viewing reports initially. There are tools which are only available when using PDF view, such as quick re-select of parameters. It is easy to use the Run as option to export to Excel when ready. Does NOT work vice versa.

NB: If the report writer has set the report default to Excel, it overrides your preference. In these instances, use the Run as function (Go to **ellipses...** on right of report name) BEFORE executing the report.

General Personal	
Home page	Defau
Report format	PDF HTML PDF
Turn on accessibility features	CSV Excel

My Schedules and subscriptions

You can also use A to check your scheduled reports using the relevant option.

Use this to check which reports you have scheduled, view run history, modify, remove or disable the schedule. Refer to Working with scheduled reports below.



2.

4. Customising Cognos using My content

Cognos allows you to personalise your views. The simplest way to utilise this is to set up your own folders in **My content**. This is your personal filing system and you need to set it up to suit your particular reporting requirements. It is not advisable to make shortcuts or copy reports indiscriminately in **My content** as it quickly becomes difficult to find items.

Creating a new folder



The created folder appears in alphabetic order

Working with folders

You can change the name, description, create sub-folders and sort the list.

To change the name of a folder, select the **ellipses...** and then **Properties** from the **Action List**





Use **Sort** to move folders around. If you are consistent with your naming convention, the **Name** sort is useful to group different folders, e.g. by GL or GM (Grants)

Deleting a folder

	New Folder 05/08/2021 10:46	0
0	Testing Cog 11 06/07/2021 14:34	a ^a g Share i ⊂ Copy or move
	YENU cogmod 05/06/2020 09:41	A Create shortcut
-	M	🗊 Delete 🥓
-		2 Properties

Adding a link

NB: This function is under investigation and is not currently working.

ŵ	Home	🗁 My content	O 4 ti
Q	Search		
0	My content	A CONTRACTOR	

Navigate to **My content**, select the **+** sign

Locate the folder to be deleted, choose the **ellipses...**, then **Delete** from the **Action List**

٦

View acceptable domains

Cancel

	🗅 Folder
From the context menu, select URL	⊘ URL
	P Create URL
	Specify a name and URL. Optionally, specify a description.
	Name
	Add a name for the URL

Description

URL

Add a description

Add a URL that uses an acceptable domain

Give the URL a name, description as appropriate and paste in the link.

5. Finding and running reports

The data used in the Cognos reports is extracted 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

To find and run reports log on to Cognos Analytics and follow either one of these two methods to locate a report:

- navigate via the folders; or
- use the **Search** feature.

Method 1: Navigate via the folders

From **Team Content**, navigate to **LIVE**, select your school folder, and then **Departmental** (Shared) Reports to find a standard report



By following the above path, and depending on your Cognos access, you can run the standard GL or Grants reports, open the **Grant Reporting** folder to access further grants reports, or use the AP reporting suite. However, if you select your department **named** folder you will find any bespoke reports that have been set up by your department accounts team, not Central Finance.

Home	1.00	> LIVE > School of the Biological Sciences > Departmental (Shared) Reports	V	ц
Q Search	Feik			
My conte		34/04/2018 18:42		
Do Team cor	ntent.	Grants Reporting swint/phasision		
EB Myporta		AP: Destributed		
Recent		INVERTOOR LEVEL		
		AP: Invoice Enguiny Dents/2009 18:32		
		API Supplier Empirity 29/06/2220 L2:54		
	82	GL. Dudget to Actual 20(94)2220 12:81		
	12	GE, Budger to Actual Summary depositional 11-40		
		GL: Financial Summary 30/04/002111:04		
		GL: Juurnal Transactions 20(04/2021 18:08		
		Grams: Expenditure Engury 29/04/2022 20:48		
	12	Grantesi Listing and Budget V Actual Report 19/09/2020 12:20		

Method 2: Use the Search function

🐔 IBM Cognos	Analytics	
ሰ Home	Search	10.22
Q. Search	Q. (search all your data	

Select Search

Enter all or the partial name of the required report

as it returns too many results.

NB: This method is not efficient for most department users

As you type the report name some results containing the name or partial name will start to show up in the result box. Ensure that the path of the report (in the result – as shown below) is correct

509	rch 🖽	Π
9	GL: Budget to Actual	
564	iestis	
8	GL: Builget to Actual Team content + LIVE + Central Pinance + 976A	
12	OL: Builget In Actual Teals content + LIVE + School Finance	
8	GL: Budget to Actual Team current = LIVE = School c (Sharef) Peporte	
5	GU: Burget to Actual Teen content + LIVE - Rotool a (Bhared) Record	
12	Stor Budget 10 Actual Team content in UVE in School o (Strand) Reports	
8	Git: Budger to Actual Team instant > LIVE > School + (Shared) Reports	
12	Gic: Budget to Actual Team content 1 LEVE + Rabool # Silvered) Reports	
	GL: Budget to Actual Team owners + LivE = School c(Shared) Reports	

Running a report

To run using the default settings:	Select the report link
To change the report output:	Select the ellipses next to the report to reveal more run options. Choose Run as to change the report output format e.g. HTML, PDF or Excel

Report parameters

Cognos reports require the selection of 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.

Select GL Period:	
DEC-19	\checkmark

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

Finish Cancel

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

Some selection boxes require the previous box to be completed before choosing the **Update <field>** button. This action populates the linked field 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 listed in the GL Period selection box.

Select Financial Year:		Select GL Period:	
Start Year GL Period Name	\checkmark	* DEC-19	~
Update GL Period List	/		
	-		

Before Year selected and list updated:

Period				~
Previous M	onth (DEC	-19)		
JAN-20		,		
DEC-19				
NOV-19				
OCT-19				
SEP-19				
AUG-19				
ADJ2-19				
ADJ1-19				
JUL-19				
JUN-19				
MAY-19			- Anni	- A
10		-	-	
UL	1000			
JUN-18	Ψ.			
MAY-18				
APR-18				\sim
MAR-18				

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

Period
Previous Month (DEC-19) JAN-20
DEC-19
NOV-19
OCT-19
SEP-19
AUG-19

NB: 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.

Type in the	Enter Award Number (e.g. RG123 Keywords: Type one or more keywords separated Sear Options 🕅	by spaces.
keyword and select Search	Results:	Choice: Insert Aremove
	Select all Deselect a	all Select all Deselect all

Keywords: Type one or more	keywords se <u>parated by space</u> s.	
rg79460	Search	
<u>Options</u> [⊗]		
Results:		* Choice:
RG79460	Insert 🔶	
	♦ Remove	
	Select all Deselect all	Select all Deselect all



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

The system returns the match in the **Results** box.

NB: If you want more than one choice, you need to use **Insert** each time from the **Keywords > Results**, 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.

Select Finish to run the report

RG80298 RG60538

Select all

Choice: RG79460



Exiting the report



Each closed reports shows as a tile on the homepage.

This tile can be cleared by using the **ellipses...** to display the **Action Menu**.





Select Remove from recent to delete tile.

Working with a report in PDF format

If you have selected PDF as your report format option, the following icons, which display at the top left of the report screen are useful.

Action required					
Change/re-select parameters once in a report			€ <mark>()</mark> × C		
Change report output from within report, i.e. From PDF to Excel		Run			
Download or Print report		aer +	I Ø 🖲 🙃 I		

Emailing reports

NB: The option to attach a report output using **Share** from within a report is currently not available and is under investigation.

In the meantime, use the **Download** function, save the report and attach to an email using **Outlook**, or alternatively, use **Run as**, and select **Run in background** before running report, refer below.

1. On the **Cognos Analytics** banner, click on the **Share** icon. Select **Send**

	(~)0	A	Ø
Share				
Send Link				
Select e platform!				
m Email				

Cr Box Directory Subject 2. Enter receipient (use crsid@cam.ac.uk), Report "GLI FinSum AG with CC corner" subject and message. Theoried Seld - 11 Shie - Former - B I U 12 clude the folly Include the following with my message 3. Switch off Includes link 🔵 Include link 4. Switch on Attach report output Attach report output Send Cancel

Running the report in the background and email option

Alternatively, before you go into the report selection parameters, use the ellipses... next to the report name to select Run as, then switch on Run in background.

When Run in background is enabled, a Delivery section opens below the Format and Accessibility section, where you can select the Send report by email option. Leave Save ticked.

By ticking Send report by email, the option to Edit details is displayed.

5. Send



Run



Cancel

When completed, select Run.



Share with email

-

Run as Run in background

6. Shortcuts

You are able to create shortcuts to both folders and reports. Shortcuts are stored within **My content**, and you can create many shortcuts to the same report or folder as required, depending on your folder setup. A shortcut is not the same as a copied report, and cannot be used to set up a report view or a schedule.

Create a shortcut to a report

Search or navigate to the location of the report. In this case the search path is as follows:

Team Content > Live > School of the Biological Sciences > Departmental (Shared) Reports > GL: Financial Summary



Create chortout

Cancel



The result is prefixed with **Shortcut to.** This is the default a naming convention but it can be renamed as required.

Create a shortcut to a folder

For this illustration a shortcut to the **Departmental (Shared) Reports** folder will be created in a within **My Contents**.

Search or navigate to the location of the report.

In this case the search path is as follows **Team Content > Live > School of the Biological** Sciences > Departmental (Shared) Reports

Select the ellipsis next to the folder to reveal the context menu	Departmental (Shared) Reports 23/05/2017 09:43	0	
Select Create shortcut	⊲⊜ Share 1⊡ Copy ⇔ Create shortout ▲ ⇒ Properties		
In the action box, choose My content, and a	l		

In the action box, choose **My content**, and a sub-folder, if appropriate.

Check **Destination** is correct, then select **Create shortcut**.



A shortcut to the report will now be placed in the selected folder

€ 1	BM Cognos Analytics					
G H	ome	My content	2	∇	'n.	
Qs	earch	ther Shortcat to Departm (Shared) R	epor	ts		-
	y content	9 30/07/2021 12:07		_	p.y	

Move or copy a shortcut

Locate the shortcut to be moved or copied, sel ellipses, choose Copy or move from the ac	
Select a destination	Copy or move: Shortcut to GL: Financial Summary × Select a destination
Choose Copy to OR Move to	Copy or move: Shortcut to GL: Financial Summary × Select a destination Select a destination My content > Alk sorts Copy to Move to Canoli Copy to Canoli
A confirmation of successful action appears briefly at top of screen	Shortcut to GL: Financial Summary was moved. X

Delete a shortcut

Locate the shortcut to be deleted, select the **ellipses...**, choose **Delete**



Confirm delete		
Geleting entries can break links. Are you	sure you want to delete th	le selected entrie
	- COM	Cancel

Select OK to Confirm delete

+ 17 11

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 folder(s) in **My content** to make finding reports easier. 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.

Copy a report

For this illustration a copy of **GL: Financial Summary** will be taken and placed inside a folder called **ABC**, within **My content**.

- III > LUVE > School of the Bological Sciences. > Departmental (Shared) Reports

1 Home

Go to the report you wish to copy by either searching for it by name or navigating to its location Select the ellipsis next to the report name to reveal the context menu	Q Search My content D My partal pages () Recent	Future OL Flagson Sig D: Standball Sig D: Standball Sig D: Standball Sig D: Standball Sig Standball Sig Standball Sig <th>0</th>	0
Select Copy	 Rum as ☑ View versions I Share ☑ Copy Ø Create shortcut ➢ Properties 		
	Copy or move: GL: Finar	ncial Summary ×	
	Select a destination		
In the dialogue box that appears:	D D My content		
select My content	C All sorts		
 if appropriate, select your 	C GLAtt Fuiders	1.9451up	
folder e.g. ABC	C GL Reps with a		
	Destination: My content	Ecopy to Cancel	

	Copy or move: GL: Financial Summary				
	Select a destination				
Check the Destination is	🗅 🗅 My content 🗧 ABC				C7
correct, then select Copy to	Shortcut to GL: Financial Summary				
	Destination: ABC	Copy to		Cance	eL
A confirmation messages appears briefly at top of screen	 GL: Financial Summary was copied. 		×		
	□ My content > ABC	+	∇	î↓	
A copy of the report will now be placed in the selected folder	GL: Financial Summary 20/04/2021 13:04				
	Shortcut to GL: Financial Summary 17/03/2021 11:18				

Rename the copied report

It is advisable to change the name of the copied report as soon as you make the copy. You should make the name descriptive so you know what parameters you are saving, or what the schedule involves. You can make many copies of the same report, as required, so each one should have a different name.

 Navigate to the copied report, and select the ellipses... next to the name

 □ My content > ABC
 + □ ↑↓

 □ GL: Financial Summary 20/04/2021 13:04

 ▷ Shortcut to GL: Financial Summary 17/03/2021 11:18



Choose Properties



The report name is changed

	My content > ABC	+	7	↔
B	Copy GL: FinSum PD SoF then CC, with su 09/08/2021 12:21	ibtot		

8. Report View

A **report view** is a copy of a report that is stored in your personal content. A report view can be set up so that associated prompt values, including format, can be pre-selected and saved with the report view. This allows the report to be re-run quickly when required, although, for some reports, you may need to update the period parameter each time. 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. Copies must be made from reports in **Team content.**

Creating a Report View

1. Find the base report

Navigate to **Team Content** and locate the report you require. In this example, we use the **GL: Financial Summary**, then select the **ellipses...** and choose **Copy**

2. Copy the report

Navigate to an appropriate place in **My Content** for the report, select **Copy to** (For detailed guidance, refer to Section 7 above.)

3. Add report properties and parameters to your view

Select the **ellipses...** next to the name of the report you copied



Select **Properties** to reveal the next dialogue box

⊳ Run as	
C View versions	
≪ Share	
Copy or move	
🖒 Create shortcut	
ū Delete	
₽ Properties	

General:

allows users to disable the report view entry if no longer needed, view source report, permissions, and search path

Own cr60			Modifie		5/2018, 09:2 4/2021, 13:0 rt View
General	Report	Sche	dule I	Permiss	ions

allows users to set/edit/clear prompt values, change/set report output format i.e., HTML, PDF, Excel and change other advanced settings

- Use Current values > Set values to set report parameters
- Use **Report options** to set report output/delivery

Copy GL: F	inSum PD S with subtot
Q Owner cr602	Created: 22/05/2018, 09:21 Modified: 09/08/2021, 12:21 Type: Report View
General Report	Schedule Permissions
Source	GL YTD Balances
Prompt values	
Prompt for values	
Current values	Set values >
Report options	
Advanced	~



Select **Set values** > **Set** and the available parameters will display





A message displays whilst the report parameters screen is generated

Choose the parameters you want to default in and select Finish from bottom of report parameter screen



Generating inputs for report

We advise you NOT to uncheck the **Prompt for values** box as you may want to change a particular selection **before** the report runs, e.g. GL period, cost centre, project. By leaving the box checked, the parameter selection screen appears each time you run the report. Your saved selections default, but you have the opportunity to change one or more of the values, if required, for this instance. If no changes required, choose **Finish**. If you uncheck this box, the report displays the output immediately, with pre-selected parameters.



5. Setting Report options

Select	>	to display options and choose desired
format		

Format	Excel 🗸
PDF options	Set >
Enable accessibility support	False 🗸

6. Scheduling your Report View

Select Properties to reveal the dialogue box

Schedule: allows users to set/edit or delete a schedule for this report view – see Scheduling a report

Copy GL: FinSum PD S with subtot						
Owner cr602	Modified:	22/05/2018, 09:21 09/08/2021, 12:21 Report View				
General Report Sche	edule Per	missions				

Working with Report View

To permanently change any of the Report View parameters, repeat steps above, and make your changes in the **Set values** or **Report options** sections.

If you have left the **Prompt for values** checked, you are able to change the selections for a particular instance, but this does not change the saved values.

Deleting a Report View

Navigate to the relevant report, select the **ellipses...** and choose **Delete**.



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.

It is better to avoid scheduling reports with date parameters as these need to be updated each time before the scheduled report runs. However, for GL reports there is an option to choose **Previous Month** as the GL period. This automatically updates each month on 1st of new month.

Creating a schedule

- Copy the report to be scheduled Before setting up a schedule, the report must be copied to My content
- Navigate to the copied report to be scheduled Select the ellipses... next to the report name to reveal the context menu.

	My content > ABC	+	7	¢↓
ß	Copy GL: FinSum PD SoF then CC 09/08/2021 12:21	, with subtot		0

Þ	Run as	2
ß	View version	s
ŝ	Share	
D	Copy or mov	e
ø	Create short	cut
Ū	Delete	
2	Properties	4

Create the schedule
 From the context menu, select Properties

4. Select the **Schedule** tab, then choose **Create schedule**



Schedule Opt	ions Prompts	Summary	
0 4	3 3	Schedule	
Frequency		Run every 1 week(s) from 10 August 2021 at 10:41 on Tuesday.	
Түре	Weekty ~	Credentials	
Repeat every	1 🗘 week	cred2 Christine, Rogerson Bedmin John ac uk	
Repest on	M T W T F S S	Priority 3	
	2 2 4 4 4 4 4	Format	
Daily time interv	- G	Exert	
		Delivery	
Period		Languages	
Start	2 2021-08-18 (Q 10-41	English (United Kingdom)	

The Schedule screen has 3 tabs: Schedule, Options and Prompts

The Schedule tab: Set the Frequency and Period here

Frequency

Specify how often you want the report to run (i.e., weekly, daily or monthly), and on which day.

Туре	Wee	skty			~			
Repeat every	1	ç	wee	ek.				
Repeat on	м	т	w	т	F	5	s	

Period

Provide a start and end date for your schedule, or select **No end date**

Period			
Start	台 2021-08-10	() 10:41	
✓ No end date			^

2 The Options tab: set the Output format and Delivery method here

Choose appropriate report format	Format HTML Excel Data Accessibility Enable accessibility support	PDF CSV	Excel
Choose how the report should be deli Recommended: Tick Send report by		Send rep	ort as an external file
Once the Send report by email box is ticked, choose Edit details	Send report by No recipients	y email	Edit details

On the next screen, complete the email as required. NB: Switch on Attach report output.

E Send report by email	
Add email addresses, as required. Use full CRSID@cam.ac.uk address	
e Boc	Direc
niee)	
a construction of the second	
A new version of Copy GLI FinSum PD SoP then CC, with subtot is available	
A new version of Copy GLI Fin5um PO 5oF then CC, with subtot is available	
6	

3 The **Prompts** tab: set the **Values** (selection parameters) required to run the report here



Select Set values

The report's selection parameters screen appears. Set your desired parameters

Choose **Finish** at bottom of report selection screen You will be returned to the **Schedule** screen.

Cancel	Finish
--------	--------

Summ	iary
Sched	ule
Run eve on Mon	ery 1 week(s) from 10 August 2021 at 10;41 day.
Crede	ntials
cr602 Christin	n.Rogerson@admin.cam.ac.uk
Priorit	¥.
3	
Forma	t
Expel, P	*O#
Delive	ny .
Save, E	mail
Langu	ages
English	(United Kingdom)
Numb	er of prompts
11	
r) Re	set default options

Check the Summary

5. Save the schedule



A confirmation message is displayed briefly at the top of the screen.

Your schedule was successfully created. X

Editing a scheduled report

Once you have scheduled a report, you may need to change the delivery schedule or edit the report parameters. There are **two** ways of actioning schedule modifications.

Method 1

Find the report in **My content**, select **the ellipses...** next to the report name to reveal the context menu.

Select the Schedule tab, then choose

If using this method, go to 3 tabs on the

From this menu select Properties.





Method 2

Edit

Schedule screen

.

Alternatively, Use (user), select **My schedules and subscriptions**



• A list of all your schedules appears

					Mysch	edules a	nd subscription	is V				3770	φ.	A
chedule	Ŷ												5	ali 🖥
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0			2		.e.		(#)	÷.	÷.	4		0		
N	lami	6		Mo	dified ^	Туре	Scheduled by	(Status		Priority			
3			Sch GL: Jneffimz Weekly 5	tationery	39/06/2	021	m cr602		Disabled		3			
2	× 1	n :	SCH GM ListBudAct PD 30	days	30/06/2 09:01	021	菌 (r602		Disabled		3 i			
3			SCH GL: BudAct PDBA trav	es codes	30/06/2	021	m cr602		Disabled		7			

• Choose the report you wish to modify, and click on the ellipses... on the right



- From the options, select Modify this schedule
 - ··· \bigtriangleup \raises \raises \raises Edit Delete Summary Run every 1 week(s) from 18 March 2021 at 09:00 on Wednesday, Thursday.

Whichever method you choose, the following applies.



Choose Edit

.

Use the Options tab to change Format or Delivery	SCH GL: Jnal Trans PDBA		
 To change email recipients, go to details in Delivery section. 	o Edit	Delivery Save Save Save report Save report as an external file Send report by omail recipients	Edit details
• Ensure Attach report output is selected when sending emails.	BIUSX, X BIUSX, X Include the following with my m Include link Attach report output		yles + Format +
Use the Prompts tab to change Values (parameters)	e the	SCH GL: Jnal Trans P	DBA
• Select the Edit icon	SCH GL: Jnal Trans PDBA Schedule Options Q Find Parameter name Balance Types	Parameter value Actual	14 亩 之
The report parameter selection of Modify as required. Choose Fini		Cancel Finish	
Select Save when all edits have been the 3 tabs.	n made to	Save	Cancel
A message appears briefly at top of screen"	🔗 Your schedu	ile was successfully upda	ted. X

Method 1

My Contents > Report > ellipses ... > **Properties > Schedule**

Sch QL: Jerf	Irna Weakly Stationery	
D Owner cr602	Consted: 22/06/2018, 09:25 ModBled: 50/06/2023, 11:00 Type: Report New	-
General Report	Schedule . Permissions	
C Enable	Edil Delete	
Summary		
Rus every 1 week(s) Wednesday, Thursd	tiom 18 March 2021 at 09:00 on W.	

Method 2

User > My schedules and subscriptions > Report > ellipses... > Modify this schedule



Use the toggle button to Enable/Disable your schedule. The button is greyed out when Fnable

disabled (Enable off)

NB: Use this function if you are away from work and do not want the report to be emailed to yourself during this period. This saves you having to edit the Period of your scheduled report before and after your absence.

Deleting a Schedule

If you no longer need your schedule, you can delete the schedule, but once deleted, it cannot be restored. It may be safer to **Disable** it instead (see above).

- 1. Navigate to the schedule
 - either from My Contents > Report > ellipses ... > Properties > Schedule; or
 - from User > My schedules and subscriptions > Report > ellipses... > Modify this schedule.
- 2. use the **Delete** option (next to **Edit)**.
- 3. A popup appears requesting confirmation of deletion.

	×
This cannot be	undone.
ОК	Cancel
	This cannot be ок

The schedule is deleted and will no longer be available.

Viewing a schedule

Navigate from User > My schedules and subscriptions. A list of your schedules will display.

Select the schedule to be viewed, and choose the ellipses... next to the report name.

Select View versions Find the date of the report to be viewed. If only the latest date is showing, tick Show all history box to view all dates. Image: Select View versions Image: Select View versions



Versions	
Varsions Archivee	
Show all history	
10 Aug 2021, 12:15:12	* •>

The panel displays with full details of scheduled report, such as success of run, receipients, messages, run times. The **Formats** and **Prompt** values can be checked.