



COGNOS REPORTING SYSTEM USER GUIDE

Last Updated: 7/20/2016

Purpose

This user guide provides instructions on navigating the Cognos Reporting System. Instructions are given for accessing reports and setting preferences like setting default report formats and scheduling reports to be run automatically. While this guide was created as an aide for those working in compliance to access the Approvals Report from Cognos, the procedures are the same when accessing any report.



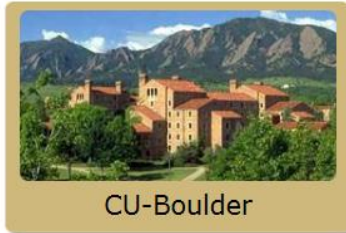
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Access the Cognos Reporting System

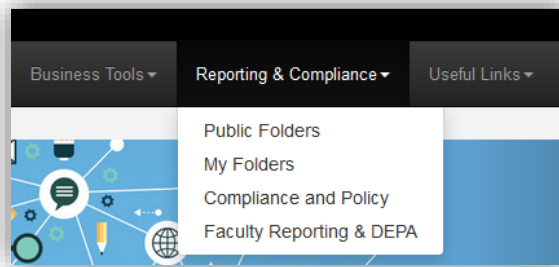
1. Go to the My CU website: <https://my.cu.edu/>

2. Click on the CU-Boulder link to login.



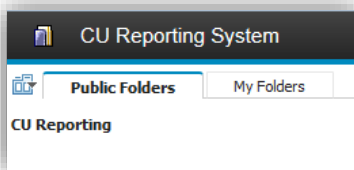
3. Use your Identikey and password to login.

4. Click on the Reporting and Compliance drop-down box, then Public Folders



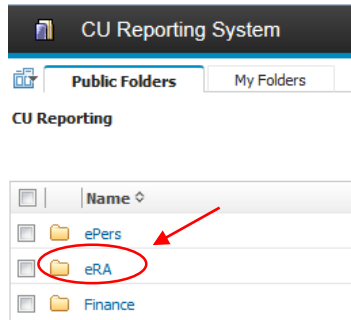
This takes you to the *CU Reporting System* where you can view, create, and manage queries and reports. Note that there are 2 tabs:

- **Public Folders** is where you will find Cognos content that is available to *all* users with the appropriate security.
- **My Folders** is where you can store content that will only be visible to you.



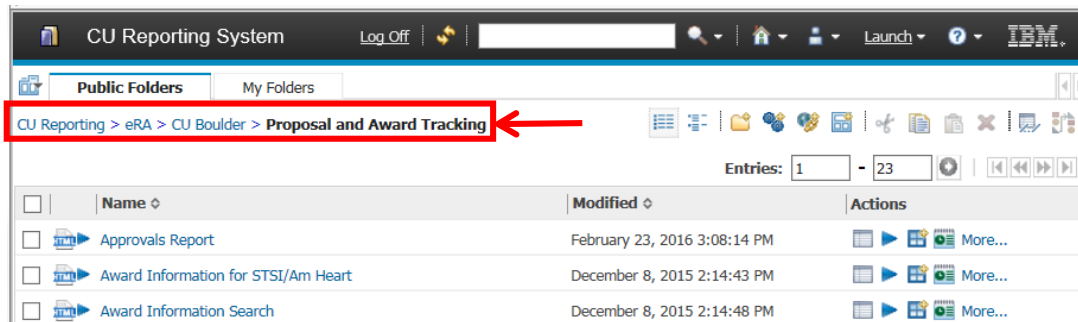
Pull an Approvals Report

1. Select the **eRA** folder.



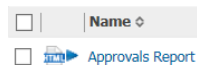
2. Continue to navigate to the **Proposal and Award Tracking** folder.

- Note that the path (aka “breadcrumbs”) that you have selected is displayed underneath the folder tabs in Cognos. Click on any of the live links within the “breadcrumbs” to return to previous folders.



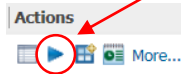
You have 2 options to run the Approvals Report:

- Option 1: Click on the report name.
 - Clicking the report link limits your options in that the report will run in the default format, which in this case is HTML.



b) Option 2: Click on the **Run with Options** icon under *Actions*.

- Using the **Run with Options** icon from *Actions* provides the flexibility to select the output format.



Run with options - Approvals Report
 Select how you want to run and receive your report.

Format:
 Excel 2007

Accessibility:
 Enable accessibility support

Language:
 English (United States)

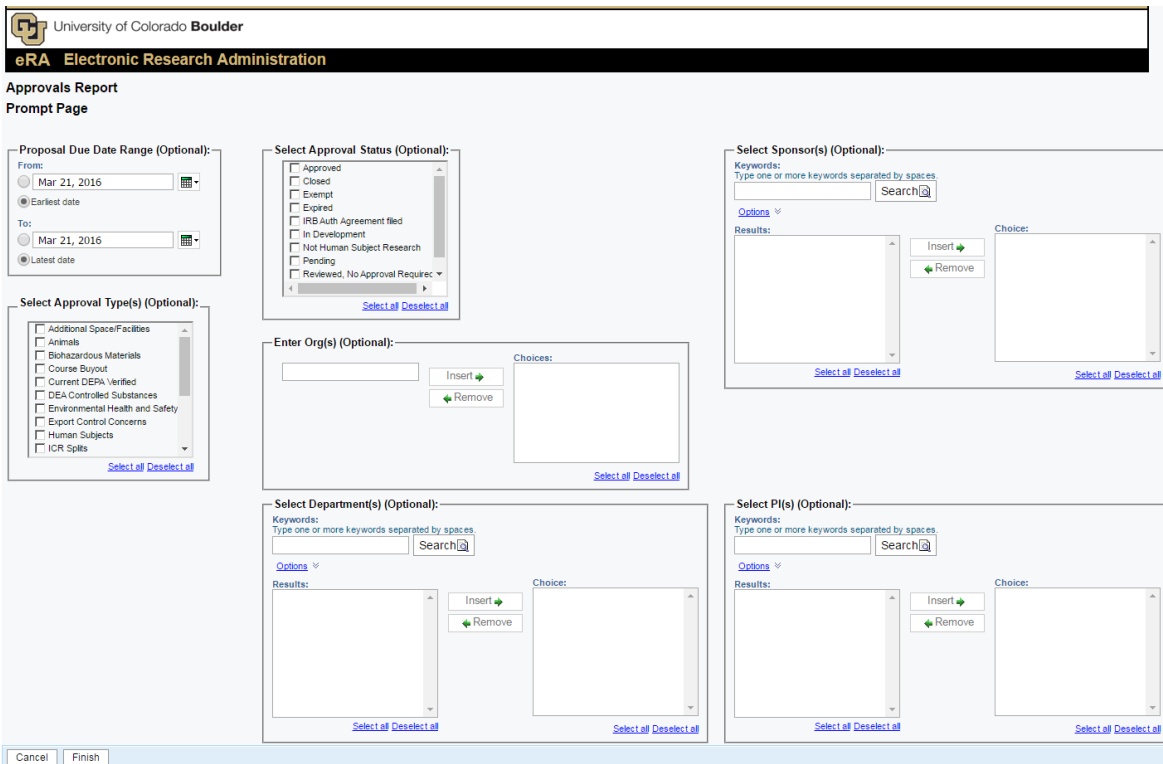
Delivery:
 View the report now
 Print the report:
 Printer location:

Prompt values:
 No values saved
 Prompt for values

Run Cancel

3. Click on the Run button.

The *Prompt Page* will appear.



University of Colorado **Boulder**
eRA Electronic Research Administration

Approvals Report
Prompt Page

Proposal Due Date Range (Optional):
 From: Mar 21, 2016
 Earliest date
 To: Mar 21, 2016
 Latest date

Select Approval Status (Optional):
 Approved
 Closed
 Exempt
 Expired
 IRB Auth Agreement filed
 In Development
 Not Human Subject Research
 Pending
 Reviewed, No Approval Required

Select Sponsor(s) (Optional):
 Keywords: Search
 Options
 Results: Insert Remove
 Choice:

Select Approval Type(s) (Optional):
 Additional Space/Facilities
 Animals
 Biohazardous Materials
 Course Buyout
 Current DEPA Verified
 DEA Controlled Substances
 Environmental Health and Safety
 Export Control Concerns
 Human Subjects
 ICR Spills

Enter Org(s) (Optional):
 Choices: Insert Remove

Select Department(s) (Optional):
 Keywords: Search
 Options
 Results: Insert Remove
 Choice:

Select PI(s) (Optional):
 Keywords: Search
 Options
 Results: Insert Remove
 Choice:

Cancel Finish

Notice that there are several options to filter the data:

- Date Range (reflecting the Proposal Due Date)
- Approval Type
- Approval Status
- Org # (s)
- Department (s)
- Sponsor (s) or
- Principal Investigator

All of the fields are “optional” and all but the *Date Range* field allow for multiple selections.

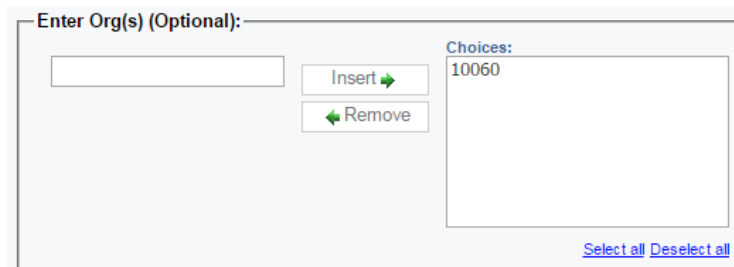
PRACTICE: Specify Report Parameters

The date field and the “Check-box” fields are fairly straightforward; however for those unfamiliar with Cognos, this exercise will provide examples of using a “Text Box” field, and the “Select and Search” field.

1. Leave the *Date*, *Approval Type*, and *Approval Status* fields blank.

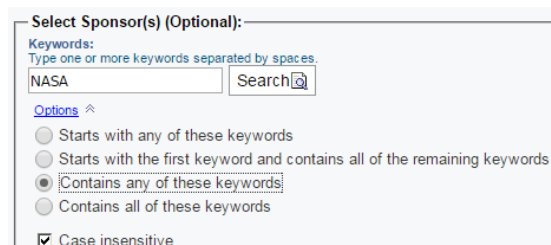
2. In the *Enter Org(s)* field, type a PeopleSoft org number (e.g. 10060) into the box.

3. Click the **Insert** arrow to add the org number to the *Choices* box. This process may be repeated to enter multiple org numbers.

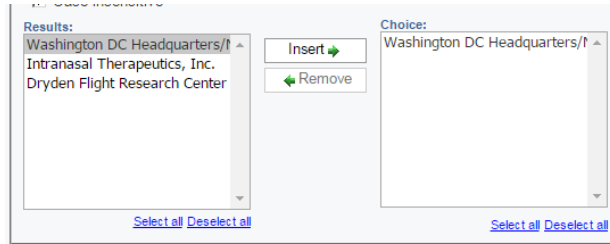


4. Select a *Sponsor* by typing “NASA” in the *Keywords* box.

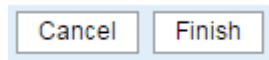
a. Click to expand the *Options* link to select search behaviors.



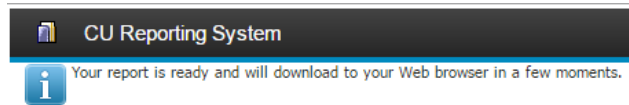
5. From the *Results* box, select “**Washington DC Headquarters/NASA**” and use the **Insert** arrow to move it to the **Choice** box.



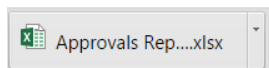
6. Click **Finish** to run the report.



A message will appear indicating the report is being downloaded.

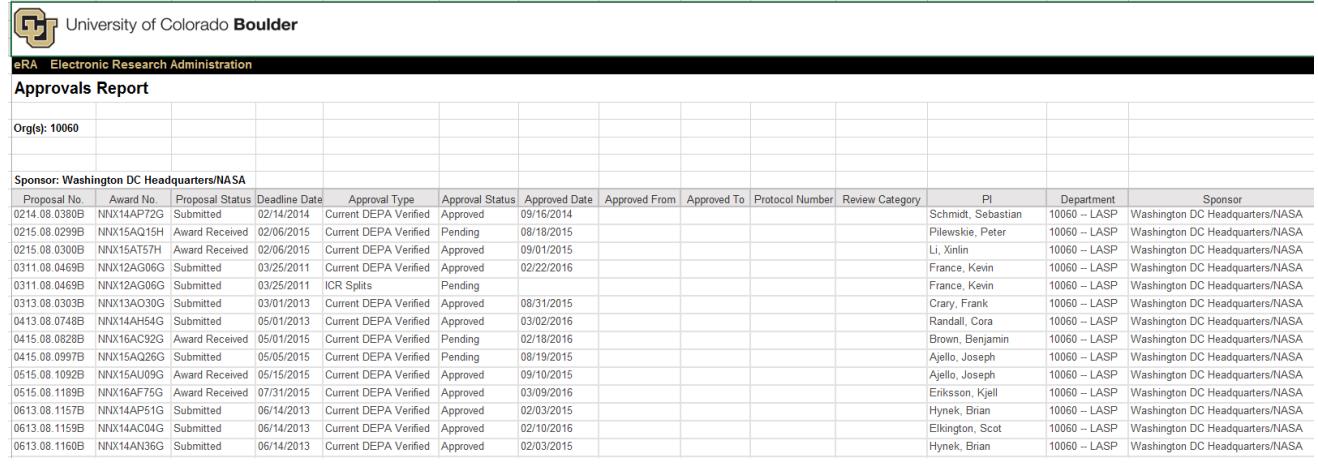


Depending on the browser and browser settings, the Excel file may show up in the Downloads folder/menu or in the Task Bar area.



The downloaded may will appear like this along the bottom of the web browser window.

7. Click to open the report in Excel.



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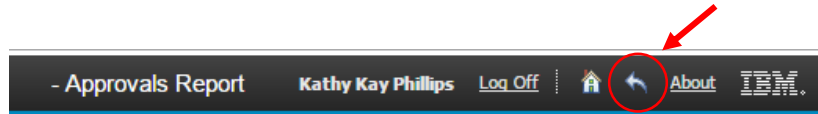
Approvals Report

Org(s): 10060

Sponsor: Washington DC Headquarters/NASA

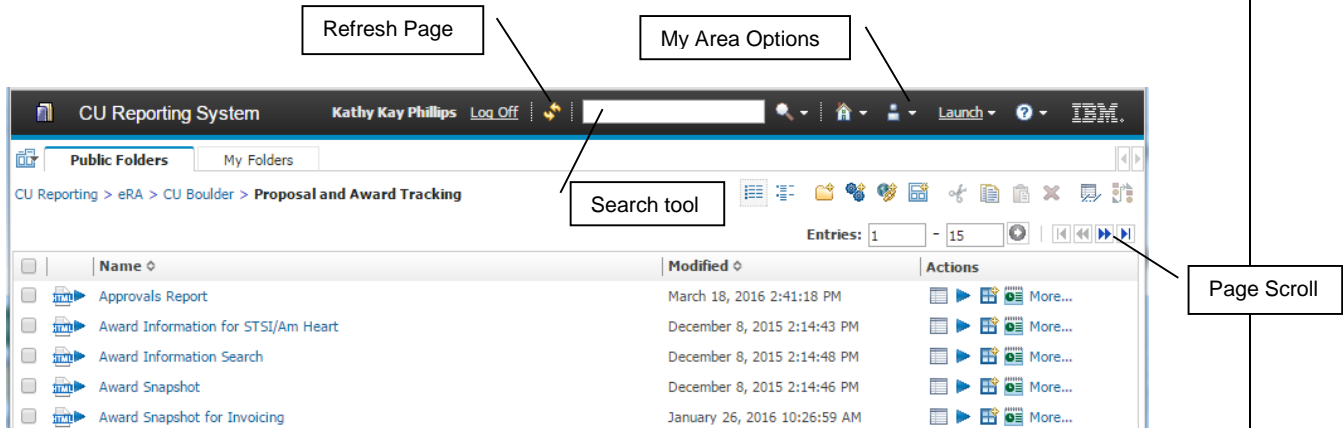
Proposal No.	Award No.	Proposal Status	Deadline Date	Approval Type	Approval Status	Approved Date	Approved From	Approved To	Protocol Number	Review Category	PI	Department	Sponsor
0214.08.0380B	NNX14AP72G	Submitted	02/14/2014	Current DEPA Verified	Approved	09/16/2014					Schmidt, Sebastian	10060 - LASP	Washington DC Headquarters/NASA
0215.08.0299B	NNX15AQ15H	Award Received	02/06/2015	Current DEPA Verified	Pending	08/18/2015					Pilewske, Peter	10060 - LASP	Washington DC Headquarters/NASA
0215.08.0300B	NNX15AT57H	Award Received	02/06/2015	Current DEPA Verified	Approved	09/01/2015					Li, Xinlin	10060 - LASP	Washington DC Headquarters/NASA
0311.08.0469B	NNX12AG06G	Submitted	03/25/2011	Current DEPA Verified	Approved	02/22/2016					France, Kevin	10060 - LASP	Washington DC Headquarters/NASA
0311.08.0469B	NNX12AG06G	Submitted	03/25/2011	ICR Splits	Pending						France, Kevin	10060 - LASP	Washington DC Headquarters/NASA
0313.08.0303B	NNX13AO30G	Submitted	03/01/2013	Current DEPA Verified	Approved	08/31/2015					Crary, Frank	10060 - LASP	Washington DC Headquarters/NASA
0413.08.0748B	NNX14AH54G	Submitted	05/01/2013	Current DEPA Verified	Approved	03/02/2016					Randall, Cora	10060 - LASP	Washington DC Headquarters/NASA
0415.08.0828B	NNX16AC92G	Award Received	05/01/2015	Current DEPA Verified	Pending	02/18/2016					Brown, Benjamin	10060 - LASP	Washington DC Headquarters/NASA
0415.08.0997B	NNX15AQ26G	Submitted	05/05/2015	Current DEPA Verified	Pending	08/19/2015					Ajello, Joseph	10060 - LASP	Washington DC Headquarters/NASA
0515.08.1092B	NNX15AU09G	Award Received	05/15/2015	Current DEPA Verified	Approved	09/10/2015					Ajello, Joseph	10060 - LASP	Washington DC Headquarters/NASA
0515.08.1189B	NNX16AF75G	Award Received	07/31/2015	Current DEPA Verified	Approved	03/09/2016					Eriksson, Kjell	10060 - LASP	Washington DC Headquarters/NASA
0613.08.1157B	NNX14AP51G	Submitted	06/14/2013	Current DEPA Verified	Approved	02/03/2015					Hynek, Brian	10060 - LASP	Washington DC Headquarters/NASA
0613.08.1159B	NNX14AC04G	Submitted	06/14/2013	Current DEPA Verified	Approved	02/10/2016					Elkington, Scot	10060 - LASP	Washington DC Headquarters/NASA
0613.08.1160B	NNX14AN36G	Submitted	06/14/2013	Current DEPA Verified	Approved	02/03/2015					Hynek, Brian	10060 - LASP	Washington DC Headquarters/NASA

8. To return to your home dashboard, click on the **Back Arrow** in the **Menu Bar**. It is usually safer to use the Cognos-provided navigation tools rather than the browser tools.



Navigate and Set Preferences in Cognos

Basic Navigation Elements



The screenshot shows the Cognos Reporting System interface. Callouts point to the following elements:

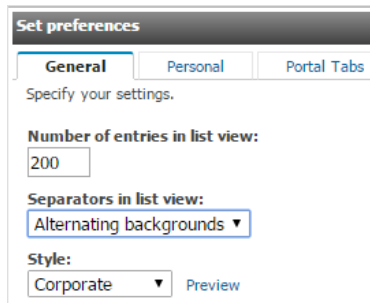
- Refresh Page:** A button in the top navigation bar.
- My Area Options:** A button in the top navigation bar.
- Search tool:** A search input field in the top navigation bar.
- Page Scroll:** A scroll bar on the right side of the list view.

The main content area displays a list of reports under the heading "Proposal and Award Tracking". The list has columns for Name, Modified, and Actions. The "Entries" control shows 1 to 15 items per page.

Set Number of Entries in List View

The default number of entries on a page is 15. Modify this to eliminate having to scroll through pages.

1. Open the *My Area Options* and select **My Preferences**.
2. Change the Number of entries in list view to another number. You may also select a "Separator" between rows, which may make the Cognos page easier to read.



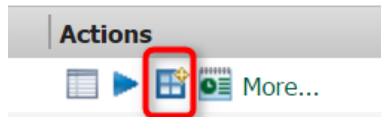
The "Set preferences" dialog box is shown with the "General" tab selected. The "Number of entries in list view" is set to 200. The "Separators in list view" is set to "Alternating backgrounds". The "Style" is set to "Corporate".

3. Click **OK**.

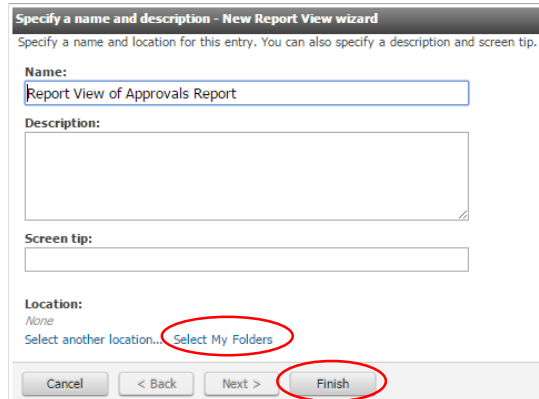
Create Shortcuts To Favorite Reports

Make a *Report View* shortcut to the **Approvals Report** that will be accessible in **My Folders**.

1. Under *Actions*, click on the **New Report View** icon.

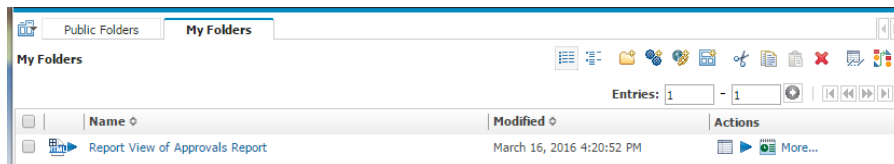


2. In the *New Report View* wizard, click on the **Select My Folders** link. Then click **Finish**.

A screenshot of a 'New Report View wizard' dialog box. The title is 'Specify a name and description - New Report View wizard'. Below the title, it says 'Specify a name and location for this entry. You can also specify a description and screen tip.' There are three input fields: 'Name:' with the text 'Report View of Approvals Report', 'Description:', and 'Screen tip:'. Below these is the 'Location:' section, which shows 'None' and a link 'Select another location...' followed by 'Select My Folders' (highlighted with a red circle). At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish' (highlighted with a red circle).

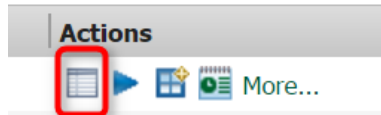
A *Report View* of the original report in Public Folders will appear in your My Folders tab.

- You can now run the report, change default properties, save output, schedule, and set prompt values that you want to reuse.

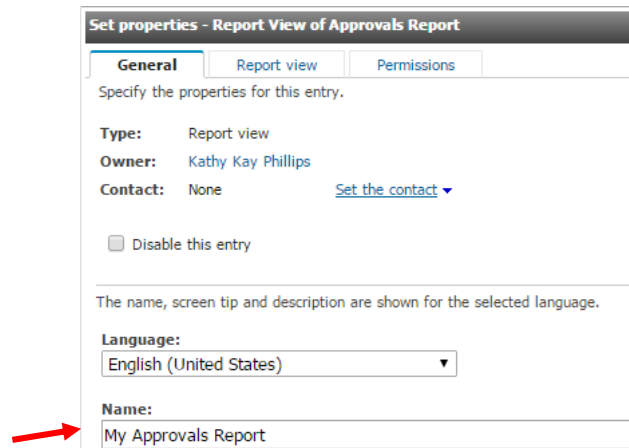


Set Default Options for Favorite Reports

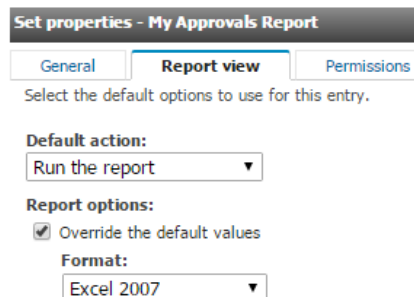
1. Open the properties/attributes of the *Report View* by clicking on the **Properties** icon under *Actions*.



From the *General* tab of the report properties, you can change the name of the report.



2. Click on the **Report View** tab to change the default action, override the default output values, and set the default output format.



3. Click on **Set** under *Prompt values*.

Set properties - My Approvals Report

General **Report view** Permissions

Select the default options to use for this entry.

Default action:
Run the report

Report options:
 Override the default values
Format:
Excel 2007
Accessibility:
 Enable accessibility support
Language:
English (United States)
PDF options:
 No options saved
[Set...](#)

Prompt values:
 No values saved
[Set...](#) **→**
 Prompt for values

[Advanced options](#)

OK Cancel

4. Choose the prompt value(s) as you would when you run the report.

- Values set here will be saved and applied every time the report is run until the value(s) are edited or cleared.
- Uncheck the *Prompt for values* checkbox if you do not wish to be prompted for other values when you run the report.
- Leave it checked if you may want to change filters, e.g. the date.

Prompt values:
 p_Date: p_Dept: p_Org: '10060': p_PI: p... [View all](#)
[Edit...](#) [Clear](#)
 Prompt for values

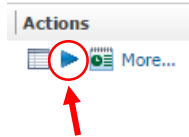
[Advanced options](#)

OK Cancel

5. Click **OK** to save your settings and return to *My Pages*

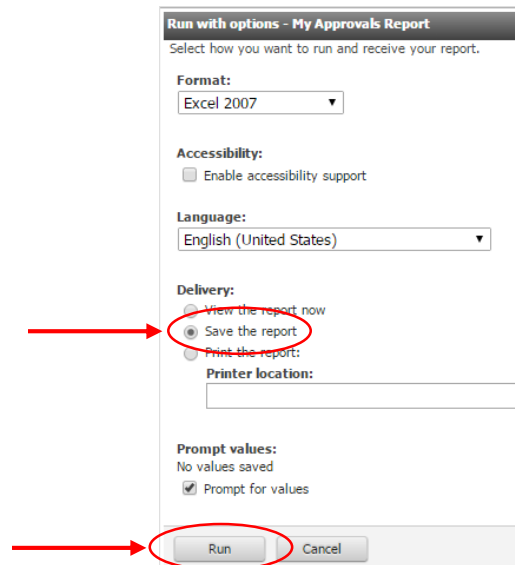
Create a Shortcut to a Favorite (Modified) Report

1. Run the report with the newly modified report view settings by clicking on the **Run with Options** icon under *Actions*.

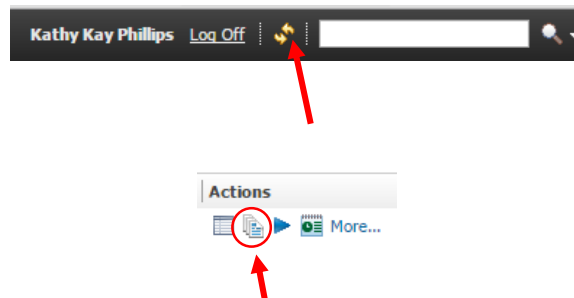


Note that the format and prompt values that you selected are now the default.

2. For *Delivery*, select **Save the report** to save a copy of the output in *My Folders*.
3. Click **Run**.

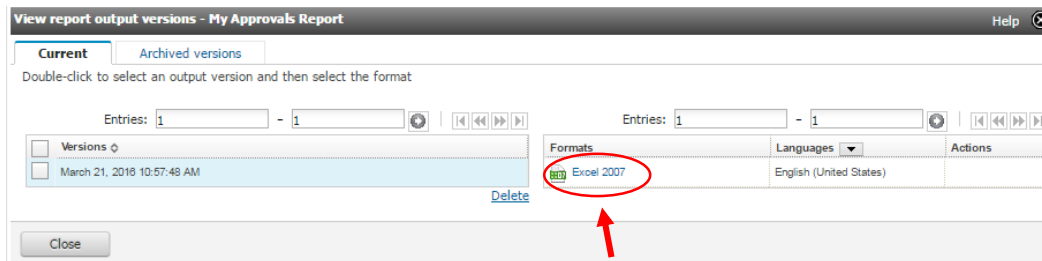


4. From the main screen, click the **Refresh** icon to reveal a link to *View Report Output Versions* under *Actions*.
 - o If it does not appear, wait ten seconds and refresh the page again.



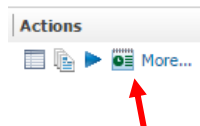
5. Click on the View report output versions icon.

6. Click on the Excel link to open the saved report.



Schedule a Report to Run Automatically

1. Click on the **Schedule** icon under *Actions*.



Note the variety of options available to schedule a report.

2. Enter scheduling parameters.

The schedule as shown below will run the report on a daily basis starting March 22, with no end date, at 7:00 AM

