



COGNOS USER GUIDE

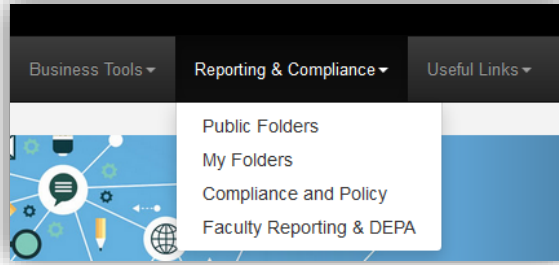
Updated: 8/29/2016

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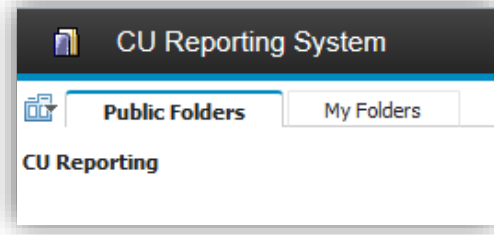
Access to the Cognos Reporting System

1. Log in the **myCUinfo** at <https://mycuinfo.colorado.edu/>
2. Use your **IdentiKey** to login.
3. Open the **Reporting and Compliance** menu and select **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.

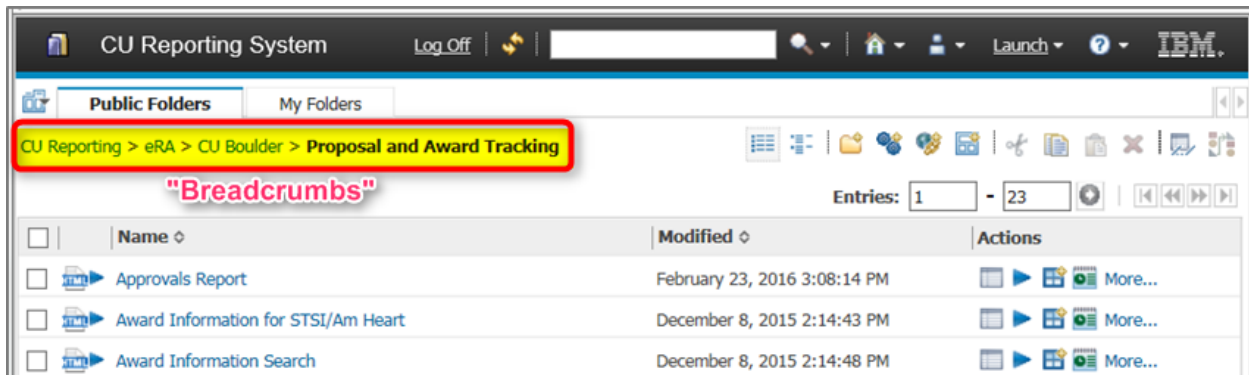


Run a Report

Navigate to the desired report list:

- eRA > CU Boulder > [Proposal and Award Tracking](#)
- eRA > CU Boulder > [Live Reports](#)

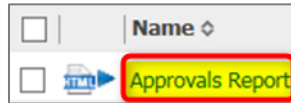
Note that your location within the reports directory is visible in the “breadcrumbs” that is displayed near the top of the page. Click on any of folders within the “breadcrumbs” to return to that location.



You have 2 options when running a report:

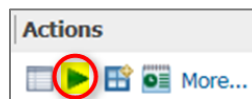
1. Run in Default Mode

Click on the report name and the report will run under default parameters.



2. Run with Options

Click on the **Run with Options** icon under *Actions* to specify output preferences.



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

After initiating the report, a *Prompt Page* will appear. Set filters, then click **Finish** to run.

University of Colorado Boulder
eRA Electronic Research Administration

Approvals Report
Prompt Page

Proposal Due Date Range (Optional):
 From:
 Earliest date
 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
 Choices:

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 Splits

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

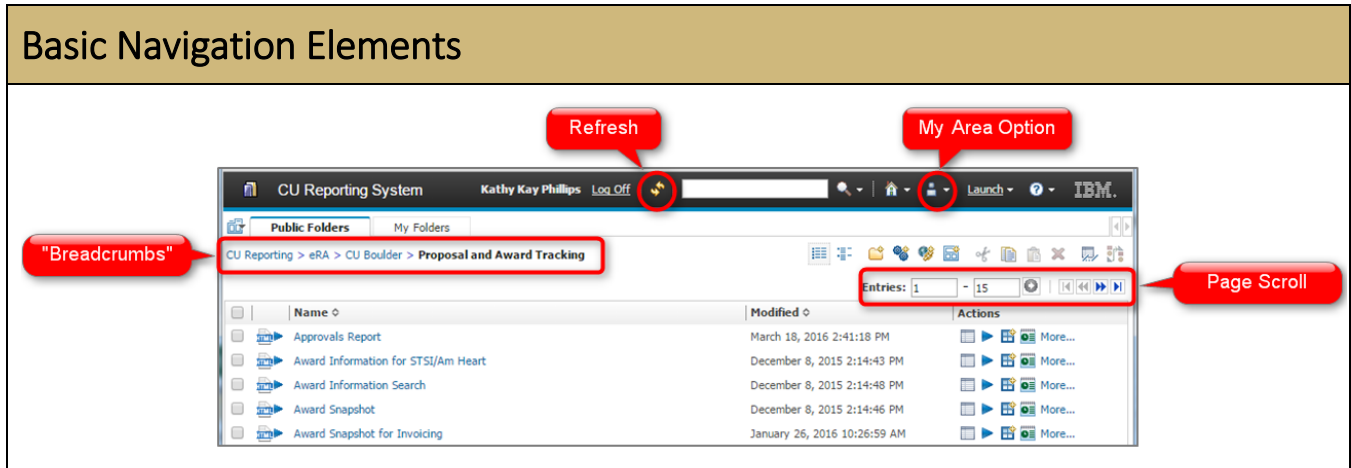
Select Department(s) (Optional):
 Keywords: Search
 Options
 Results: Insert Remove
 Choice:

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

Cancel **Finish**

Customizations

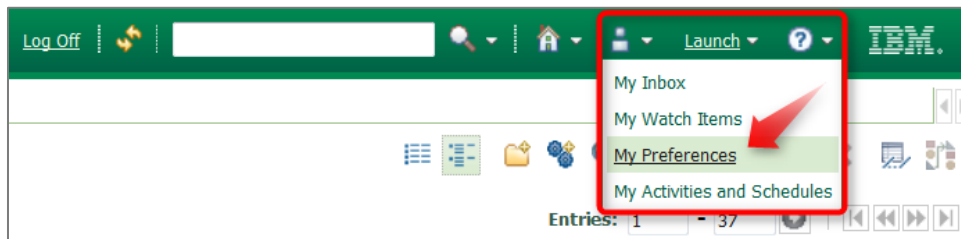
Basic Navigation Elements



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. Adjust **the Number of entries in list view**.
3. Select **Separators** between rows to make the list view easier to read.
4. Changing the style modifies the color scheme.

Set preferences

General | Personal | Portal Tabs

Specify your settings.

Number of entries in list view:

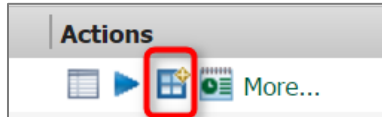
Separators in list view:

Style:
 [Preview](#)

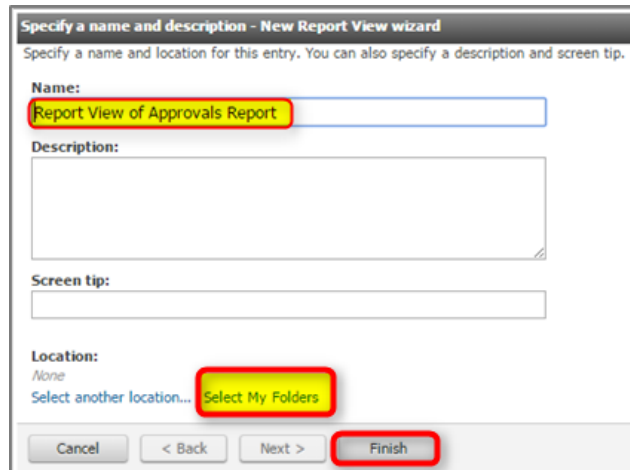
Customize Your Favorite Reports

Creating a **Report View** of your favorite reports creates a copy of the original report for which you can modify the default properties, save output versions, create a schedule to run automatically, and set “prompt” values.

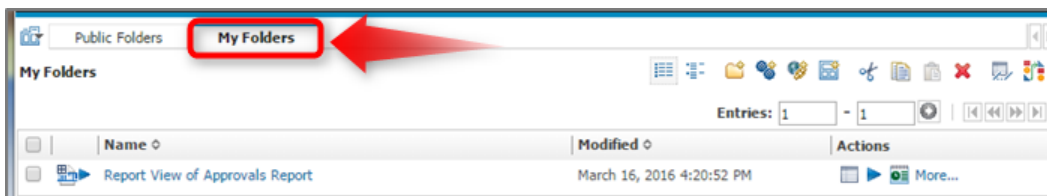
1. Under *Actions*, click on the **New Report View** icon.



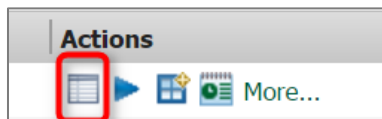
2. In the *New Report View* form, name the report and set the location by clicking **Select My Folders** at the bottom of the form. Then click **Finish**.

A screenshot of a 'Specify a name and description - New Report View wizard' dialog box. The dialog has a title bar and a main area with the following fields: 'Name:' with a text box containing 'Report View of Approvals Report'; 'Description:' with a large empty text area; 'Screen tip:' with a smaller empty text area; and 'Location:' with a dropdown menu set to 'None' and a 'Select another location...' button (highlighted with a red box) that says 'Select My Folders'. At the bottom, there are 'Cancel', '< Back', 'Next >', and 'Finish' (highlighted with a red box) buttons.

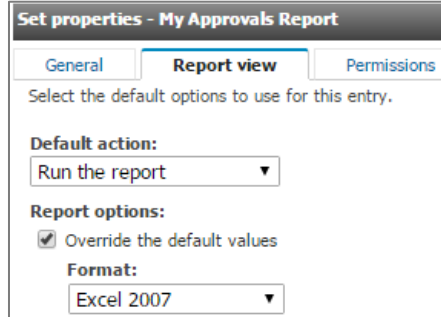
A *Report View* of the original report will appear in your **My Folders** tab.



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



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



Set properties - My Approvals Report

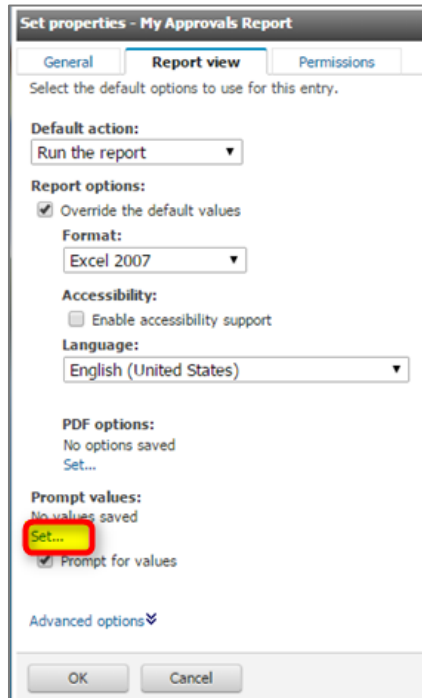
General **Report view** Permissions

Select the default options to use for this entry.

Default action:
Run the report ▼

Report options:
 Override the default values
Format:
 Excel 2007 ▼

1. To set the default prompt values, 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
 Prompt for values
Set...

[Advanced options](#) ▾

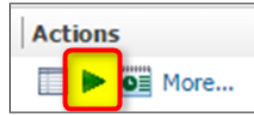
OK Cancel

- 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 each time you run the report, like the date range.
- Values set here will be saved and applied every time the report is run until the value(s) are edited or cleared.

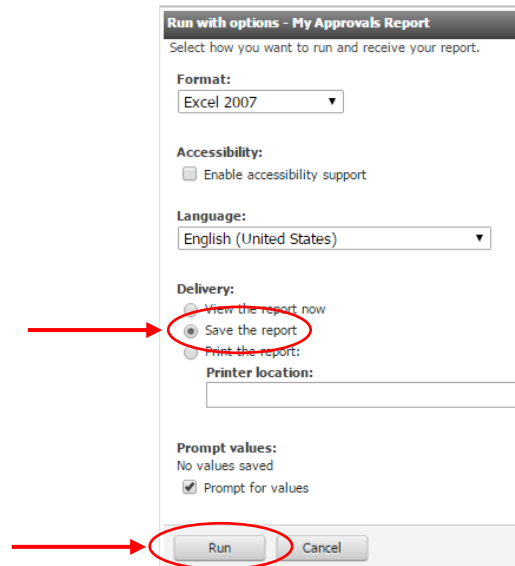
2. Click **OK** to save your settings and return to *My Folders*.

Save a Copy of a Report

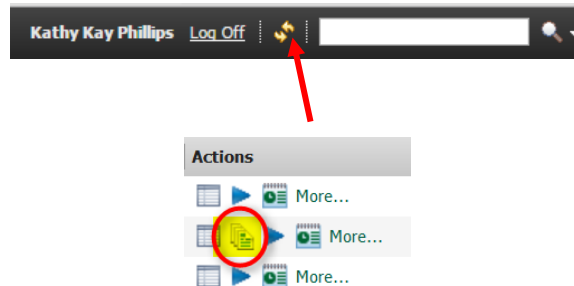
1. Select **Run with Options** icon under *Actions*.



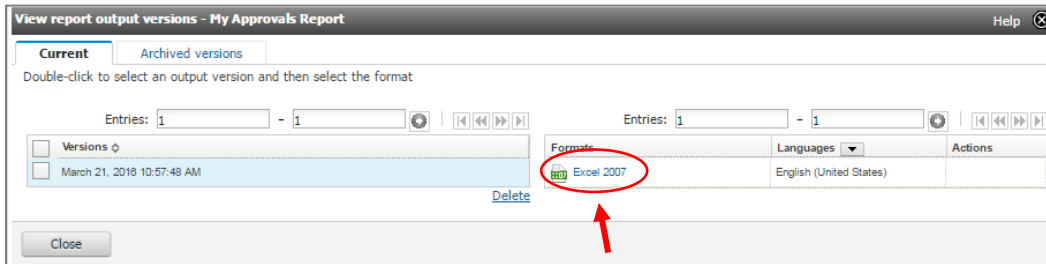
2. Under *Delivery*, select **Save the report**, then click **Run**.



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

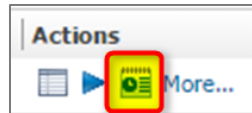


- On the *Report Output Versions > General* screen, click on the link under *Formats* to open the saved report.

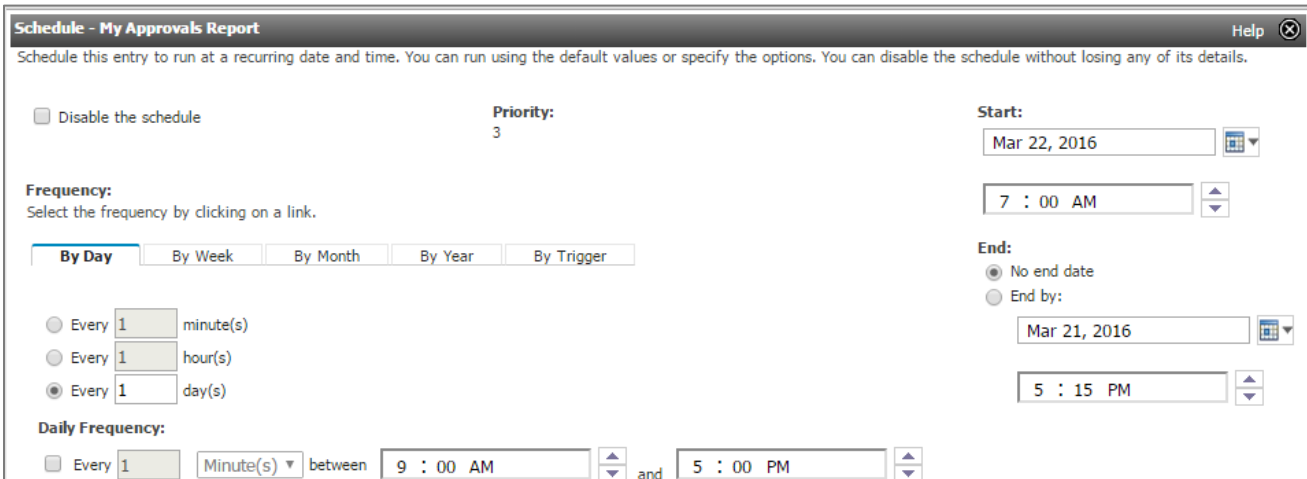


Schedule a Report to Run Automatically

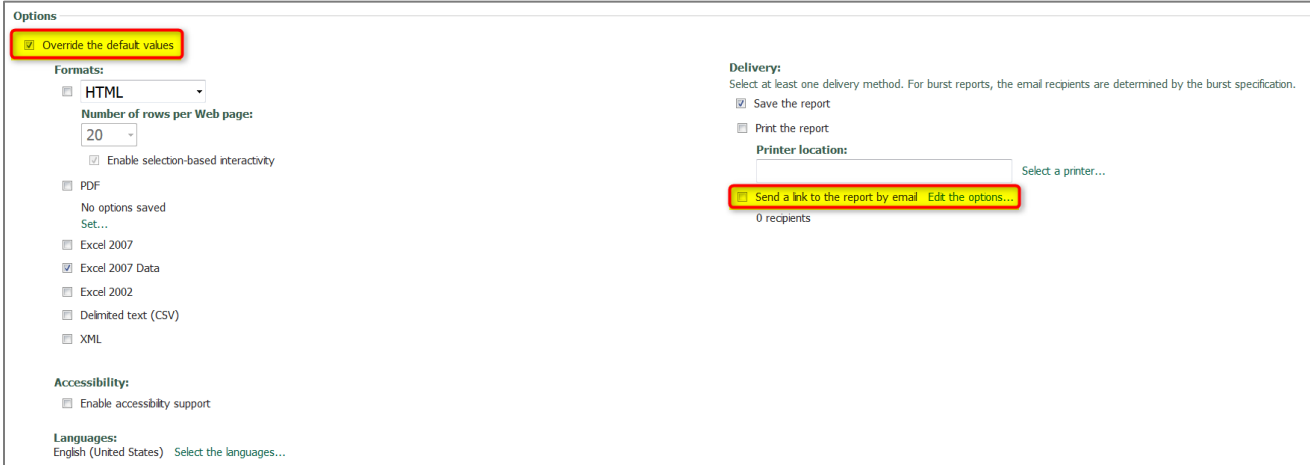
- Click on the **Schedule** icon under *Actions*.



- Set the **Frequency**, i.e. the schedule.



3. Customize the report by checking **Override the default values** under the *Options* section. (This includes the option to set up an email notification that contains a direct URL link to the report.)



Options

Override the default values

Formats:

HTML

Number of rows per Web page:
20

Enable selection-based interactivity

PDF
No options saved
Set...

Excel 2007

Excel 2007 Data

Excel 2002

Delimited text (CSV)

XML

Accessibility:

Enable accessibility support

Languages:
English (United States) Select the languages...

Delivery:
Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.

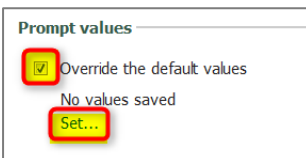
Save the report

Print the report

Printer location: _____ Select a printer...

Send a link to the report by email Edit the options...
0 recipients

4. To set the prompts, under the *Prompt values* section, check **Override the default values** and click **Set...**



Prompt values

Override the default values
No values saved

CU Reporting > eRA > CU Boulder > Proposal and Award Tracking

Report Name	Description
Approvals Report	This reports tracks proposal and awards that need approvals for various items. For example: Animals, Biohazardous Materials, Export Control Concerns, Restricted Research Waiver, Human Subjects, F&A Waiver, etc. Search by Approval Type, Sponsor, Orgs, PI or Approval Status.
Award Increment Status Dashboard	Graph 1: How many items were moved/reassigned to the status as of date. Graph 2: Total items in each workflow status. Graph 3: Total award increments (brand new awards + new mod increments)
Award Information for STSI/Am Heart	<i>For internal use by OCG.</i>
Award Information Search	This report provides data on awards that are active or active as of the date selected in the prompt. It provides the Proposal Number, Proposed Amount, PI, Sponsor, Sponsor Award Number, Awarded Start and End dates, Project Title, Awarded Amount, Co-Pis, Related Project info (prior to Dec 3, 2015). Common Uses: PI review (how many awards, which are active, etc.) Also lists all active awards in a department
Award Snapshot	The award snapshot pulls important information regarding the award all together, so the user does not have to click through multiple folders to obtain it. Formerly housed project and related project info. In development: 1) displaying mod history with drill down capacity to detailed budget; 2) integration with grants mod to display project and speedtype numbers.
Award Snapshot for Invoicing	<i>For internal use by invoicing team. Temporarily in place to support PS 9.2.</i>
Award Status	Displays items by AT workflow status. Search by Org ID, department, and/or dates.
Award Workflow Status Report	The report tracks an award through the review process in OCG and SPA. A department administrator can see what steps have been completed in the review process and if it has been completed by project set up to be able to start spending the funds received. Detailed version: Shows all the steps in the workflow, even after the speedtype is set up. Short version: The award drops off the report once project set up is complete.

Close-Out Requirements	Indicates closing requirements for awards. It tracks requirements such as: Certification of Award Expenditure, Cost Share Fulfillment, Property Reports, Final Financial Report, Final Outcome, PeopleSoft Closeout, Release and Assignment, Subcontracts, etc. Search be retrieved by Org, PI, Sponsor, Requirement Type and Dates.
Closing Awards Report	Displays all the awards closing in the selected time frame.
Deliverables	This report allows the user to pull a report of all of the award deliverables due within a specific timeframe. This is primarily used by OCG-Compliance to follow up on outstanding reporting requirements, but could also be useful for either a PI or a department to determine their upcoming reporting requirements.
FFATA Report	Tracks the last time a FFATA report was submitted to determine when they are due. (Internal use by Subcontracts team.)
ICR Splits	Displays ICR splits. Search by Org, PI, or Department.
ICR Splits with Blank Projects	<i>For internal use by SPA.</i>
ICR Splits with Exceptions	Displays ICR split exceptions. Search by Org, PI, or Department.
OCG Metrics Report_Charts	Overview of awards processed by type displayed in bar graphs. Set start/end dates.
OCG Metrics Report_Metrics	Overview of awards processed as raw data in a table. Set start/end dates.
OCG Monthly Awards Report	Lists new money received with drill down capacity linked to award snapshot. Set start/end dates.
OCG Monthly Proposal Report	Lists submitted proposals. Set start/end dates.
Project/Speedtype List	Complete list of all active awards. <i>Recommendation: Pull results into Excel format.</i>
Project/Speedtype Lookup	Look up project and speedtype numbers by proposal or award numbers.
Proposal Analyst Status Report	Displays all items assigned to a proposal analyst. Can filter by status. Set start/end dates.
Proposal Information Search	Provides overview of a proposal (e.g. status, deadline dates, analyst). Search by org number.
SPA Project Setup Tracking	Set start/end dates to display as graphs the following data: # of projects received/completed by SPA, actual vs average days it takes for a project to be entered in PS, and % of projects entered in PS within time frames.

SPA Project Setup Tracking Data	Raw data in a table of projects from “approved” to “set up complete” status.
SPA Project Setup Tracking Monthly	Set start/end dates to pull all items assigned to SPA.
Status Report for Award Tracking	<i>For internal use by OCG.</i>
Subcontract Report by Amount	Used by procurement office to determine amounts funded to subawardees for reporting purposes.
Subcontract Status Report	Shows date logged and current status. Falls off report once status is updated to “Action Complete.”
Subcontract Status Statistics and Prompt	<i>For internal use by Subcontracts team. Provides metrics on subcontracts and statuses. Set start/end dates. Filter by status or officer.</i>

CU Reporting > eRA > CU Boulder > Live Reports

Report Name	Description
Award Increments	N/A
Boulder Workflow Data	Lists awards post-project set up that need processing. Can customize by functional role or by specific staff.
InfoEd : PS Compare Data 9.2	Used by SPA to validate data between PS and eRA.
InfoEd Validation 9.2	Used by OCG to validate date in eRA before sending on to project set up.
Project Extract	N/A
Subcontract Status Report	Subcontract details, including most recently logged status. Can filter by Sub Officer, Org, or Dept.