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## Important Notes to Using & Reviewing Your Results

- **Notes**
  - **Data Population**  
This report is populated with the Pre 9.2 (PS\_ Ledger\_KK) data and PS\_KK\_Activity\_Log transactions.
  - **Items without a Budgeted Amount**  
All Actuals will print to the report regardless of the corresponding Budget Account possessing a dollar amount or zero entry.
  - **Actuals Post & Pending**  
Actuals are from approved and posted transactions.
  - **Sponsored / Non-Sponsored**  
This reports dynamically reflects both types of projects and will break out F&A when necessary.

## Locate Report

1. From the Budget & Planning [Reporting Page](#), locate “FIN016 – Sponsored Project Summary Report”
2. **Login** to IBM Cognos to run the report.

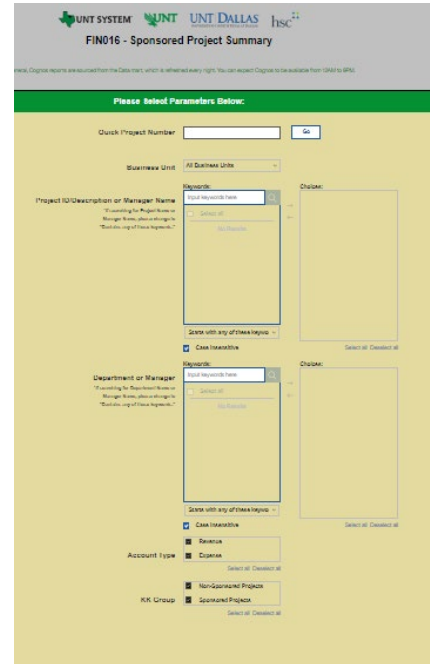
## Report Setup- Prompt Pages

### Report Setup - Prompt Pages

All initial **Landing Pages** for reports on the Cognos System will appear similar in format. You will have a set of filtering choices based on the source’s available data.

### REPORT FOCUS FILTERS / PAGE 1

1. Select your parameter choices.  
(No parameters within this report are required).



<i>Quick Project Number</i>	Simply drop a Project Number here and either <b>click the Go Button</b> or *tab and enter to select the Go Button itself before hitting enter*. This quickly runs the report for a single project. <i>If you hit the Enter Button before you have tabbed out of the field, it will simply take you to the next parameters page instead.</i>
<i>Business Unit</i>	Default will pull “All Units” or you may use the <b>Dropdown</b> to select one particular unit by which to filter the report.
<i>Project ID/Description or Manager Name</i>	You can <b>Search</b> by either the Project ID, Project Descriptions or if you know the manager, you may type here and search. For further search features, click the <b>Options Link</b> to expand additional search methods. Your results appear in the left box. <b>Highlight</b> any or all results and click the <b>Insert Button</b> to include as your filter choice here. <i>*Notes: CTRL + Click to choose more than one. If you need to view several departments and have a numbered list, you can use the department selection on the Detailed Filters/Page 2 below.</i>
<i>Department or Manager</i>	You can <b>Search</b> by either the DeptID, Dept Descriptions or if you know the manager, you may type here and search. For further search features, click the <b>Options Link</b> to expand

additional search methods. Your results appear in the left box. **Highlight** any or all results and click the **Insert Button** to include as your filter choice here.

*\*Notes: CTRL + Click to choose more than one.*

*If you need to view several departments and have a numbered list, you can use the department selection on the Detailed Filters/Page 2 below.*

*Account Type* Default **unchecked** will allow for both. You do not need to click “Select All” to do so. Otherwise, choose to **limit** the report results to Revenue or Expense by **checking** the appropriate boxes.

*KK Group* Default for this report is set to **Non-Sponsored** and **Sponsored Projects** as selected only. Otherwise, choose to **limit** it to desired type by **unchecking** the appropriate boxes as needed to focus and limit viewing results.

2. If you are satisfied with your choices and do not need to engage Detailed Filters, click the **Finish Button**. Otherwise, to run by other FoaPs elements, click the **Next Button**.

DETAILED FILTERS – CHARTSTRING INCLUSIONS / PAGE 2

3. Select your parameter choices.

*Remember that prompts filter your data. By entering values into the prompts you narrow the result sets. Start off by casting a wide net by only using one prompt. You can always rerun the report with additional prompt to narrow the results as needed.*

*Fund Category* You can either **enter** a Fund Cat within this box **or paste**. Several numbers may be entered here but each one must be on its own line to filter correctly. When you are ready, **click** the **Insert Button**. All items you have typed/pasted in to the box will move to the **Choices Box**.

*Fund* If you know a particular Fund you would like to filter by, **enter** here.

*Function* If you know a particular Function you would like to filter by, **enter** here.

*Department* If you chose Department(s) on the first page, they will automatically appear here. You can **type or paste** multiple choices additionally within the Right Box to insert additional or from a list. When you are ready be sure to click the **Insert**

	<b>Button</b> to add your entries to the <b>Choices Box</b> .
<i>Account</i>	If you know a particular Account you would like to filter by, <b>enter</b> here.
<i>Project</i>	If you chose Project(s) on the first page, they will automatically appear here. You can <b>type or paste</b> multiple choices additionally within the Right Box to insert additional or from a list. When you are ready be sure to click the <b>Insert Button</b> to add your entries to the <b>Choices Box</b> .
<i>PC Business Unit</i>	Available PCBUs are displayed in the dropdown. If you know a particular PC Business Unit you would like to filter by, <b>select</b> it here. If using a PCBU, <b>only one</b> may be filtered for at a time.
<i>Activity</i>	If you know a particular Activity you would like to filter by, <b>enter</b> here.
<i>Program</i>	If you know a particular Program you would like to filter by, <b>enter</b> here.
<i>Purpose</i>	If you know a particular Purpose you would like to filter by, <b>enter</b> here.
<i>Site</i>	If you know a particular Site you would like to filter by, <b>enter</b> here.

- If you are satisfied with your choices and do not need to engage FOAPs exclusion Filters, click the **Finish Button**. Otherwise, to run by excluding particular FoAPs elements, click the **Next Button**.

DETAILED FILTERS – CHARTSTRING EXCLUSIONS / PAGE 3

- Select your parameter choices.

*Remember that prompts filter your data. By entering values into the prompts you narrow the result sets. Start off by casting a wide net by only using one prompt. You can always rerun the report with additional prompt to narrow the results as needed.*

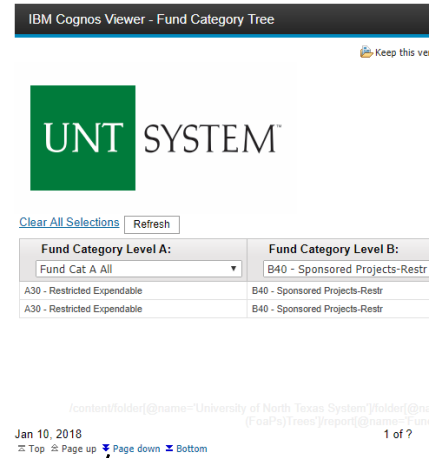
<i>Et al....</i>	The strings listed here mirror the Inclusions descriptions listed for the previous page.
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# Cognos Report Functionalities

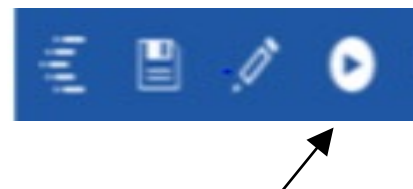
## LAYOUT OVERVIEW

- Report results are typically displayed in an interactive HTML on screen style.
- Based on your selections, if any, the report will only display results that match your initial filtering choices.
- Reports on screen may combine the Level Number result with the Description for that level in one single column. *(Report results exported to XLS will break these out, see the [Export XLS directions](#) below.)*
- If there is an error in your request or no results can be produced, you get a return message showing the parameters you chose that produced these results. *(See the [Error Results section](#) below for more information or to troubleshoot.)*
- Use the “**Page Down**” Link at the bottom left to see additional pages (if any).
- Use the “**Bottom**” Link to skip to the last page of **Applied Parameters** where you can review what your filtering choices were on the initial **Prompt Page** selections. Use the “**Top**” Link then to return to your first page.



## IN REPORT FILTERING & CONTROLS

- You can clear any originally selected **Filters** by returning to the Prompt Pages from within the Report you are currently viewing (without starting over). To do so, **click** on the “**Run as**” button on the upper left hand of the toolbar on your screen.



# Exporting Your Report Results

## Exporting Your Report Results

In the upper left hand or right hand of the toolbar on your screen, you will see options to run report and view your results.

### EMAIL REPORT DIRECTLY

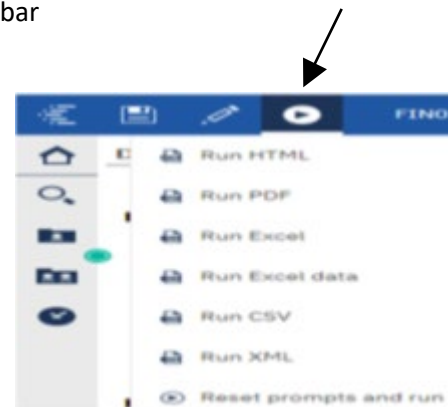
Click the **“Share”** symbol dropdown (next to the bell) on the upper right hand of the toolbar on your screen to select **“Email”**. Fill in the desired email address, any additional information, and your onscreen results will be emailed from within the Cognos program.



### RUN REPORT AND DOWN LOAD OPTIONS

Click the **“Run as”** button (white circle) on the upper left hand of the toolbar on your screen to see selections for running or exporting your results:

- HTML
- PDF
- Excel
- Excel Data
- CSV
- XML
- Reset prompts and run



# Error Results

## Run Report Error

An example of the standard results message when Cognos cannot determine a match for your requested filters is:


*No data available for the parameters chosen, please review the parameters below:  
Fund Cat: 876*

The selection you have made on the prompt page is listed automatically below the “No Data” message. Again, to re-run the report with a different selection, click the **“Run as”** button on the upper left hand of the toolbar on your screen.



## Drill-Through Message or Error

The message below will be displayed when a zero amount without supporting details is clicked on during a drill through. The same message will be displayed when a drill through has error. If that happens, the statement below, “The amount you clicked on was,” will match the amount clicked on the report.

 The report executed as designed; however, no rows of data were returned with the parameters given.

To diagnose why you are seeing this message please follow the instructions below:

- 1) Click "bottom" at the bottom left of this page to view the Parameter Page.
- 2) Review the values to look for incorrect or missing values
- 3) Click the Run button on the top left of the screen and choose "Reset prompt and run" to manually adjust the parameters of this report.
- 4) If you are unable to resolve the issue, please contact your local Budget Office for assistance.

The amount you clicked on was = 0