

**IMPORTANT NOTES TO USING & REVIEWING YOUR RESULTS ..... 1**

**LOCATE REPORT ..... 2**

**REPORT SETUP - PROMPT PAGES ..... 2**

    REPORT FOCUS FILTERS / PAGE 1 ..... 2

    DETAILED FILTERS – CHARTSTRING INCLUSIONS / PAGE 2 ..... 3

    DETAILED FILTERS – CHARTSTRING EXCLUSIONS / PAGE 3 ..... 4

    DETAILED FILTERS – CHARTSTRING EXCLUSIONS / PAGE 4 ..... 5

**REPORT RESULTS ..... 6**

    REPORT FEATURES ..... 6

    DRILL-THROUGH OPTIONS ..... 6

**COGNOS REPORT FUNCTIONALITIES..... 7**

    LAYOUT OVERVIEW..... 7

**EXPORTING YOUR REPORT RESULTS..... 7**

    EMAIL REPORT DIRECTLY ..... 7

    RUN REPORT AND DOWN LOAD OPTIONS ..... 7

**ERROR RESULTS ..... 7**

    RUN REPORT ERROR ..... 7

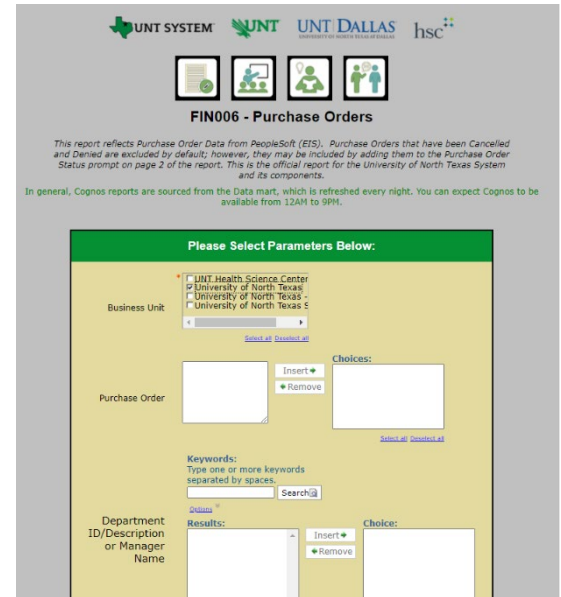
## Important Notes to Using & Reviewing Your Results

- **Notes**
  - **Data Population**  
This report is populated with data from the FINANCE – 11 package.
  - **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**  
Actuals are from approved and posted transactions.

## Locate Report

1. From the Budget & Planning [Reporting Page](#), locate “[FIN006 – Purchase Orders](#)”

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>Business Unit</i>	Default will pull “All Units” or you may select one particular unit by which to filter the report.
<i>Purchase Order</i>	If you know a particular Purchase Order you would like to filter by, <b>enter</b> here. When you are ready, <b>click the Insert Button</b> . All items you have typed/pasted into the box will move to the <b>Choices Box</b> .
<i>DepartmentID/ Description or Manager Name</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. <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>Project ID/ Description or Manager Name</i>	<p>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.</p> <p><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></p>
<i>Entered Days Back</i>	<p>You may use this prompt to filter your data to a certain number of days back from the current date (i.e. 30 days back)</p>

- 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

- 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>Requisition</i>	<p>You may enter a Requisition number here.</p>
<i>Vendor</i>	<p>You can <b>Search</b> by Vendor. You may type here and search. Several numbers may be entered here but each one must be on its own line to filter correctly. When you are ready, <b>click the Insert Button</b>. All items you have typed/pasted into the box will move to the <b>Choices Box</b>.</p>
<i>Commodity/Buyer</i>	<p>You can <b>Search</b> by Commodity/Buyer. You may type here and search. Several numbers may be entered here but each one must be on its own line to filter correctly. When you are ready, <b>click the Insert Button</b>. All items you have typed/pasted into the box will move to the <b>Choices Box</b>.</p>
<i>Budget Date</i>	<p>You may enter a range for Budget Date by which to filter the report.</p>
<i>Purchase Order Status</i>	<p>You may select one or multiple Purchase Order Status by which to filter the report.</p>

- 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 INCLUSIONS / 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>Fund Category</i>	You can either <b>enter</b> a Fund Cat within this box <b>or paste</b> . Several numbers may be entered here but each one must be on its own line to filter correctly. When you are ready, <b>click</b> the <b>Insert Button</b> . All items you have typed/pasted into the box will move to the <b>Choices Box</b> .
<i>Fund</i>	If you know a particular Fund you would like to filter by, <b>enter</b> here. When you are ready, <b>click</b> the <b>Insert Button</b> . All items you have typed/pasted into the box will move to the <b>Choices Box</b> .
<i>Function</i>	If you know a particular Function you would like to filter by, <b>enter</b> here. When you are ready, <b>click</b> the <b>Insert Button</b> . All items you have typed/pasted into the box will move to the <b>Choiecs Box</b> .
<i>Department</i>	If you chose Department(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>Account</i>	If you know a particular Account you would like to filter by, <b>enter</b> here. When you are ready, <b>click</b> the <b>Insert Button</b> . All items you have typed/pasted into the box will move to the <b>Choices Box</b> .
<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. When you are ready, <b>click the Insert Button</b> . All items you have typed/pasted into the box will move to the <b>Choices Box</b> .
<i>Program</i>	If you know a particular Program you would like to filter by, <b>enter</b> here. When you are ready, <b>click the Insert Button</b> . All items you have typed/pasted into the box will move to the <b>Choices Box</b> .
<i>Purpose</i>	If you know a particular Purpose you would like to filter by, <b>enter</b> here. When you are ready, <b>click the Insert Button</b> . All items you have typed/pasted into the box will move to the <b>Choices Box</b> .
<i>Site</i>	If you know a particular Site you would like to filter by, <b>enter</b> here. When you are ready, <b>click the Insert Button</b> . All items you have typed/pasted into the box will move to the <b>Choices Box</b> .

4. 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 4

6. 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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7. When you are satisfied with your choices, **click the Finish Button** to run the report.  
*\*If you need to make changes or want to check your filters, you can click the Back Button at any time to review and click the Finish Button from any point without having to re-enter your information.*

# Report Results

## Report Results

The screenshot shows the 'Purchase Orders' report interface. A callout box labeled 'Purchase Order Info' points to a summary section containing details like Purchase Order Number (HS783 - 0000152386), Vendor (Apple Computer Inc), and Purchase Order Total (\$722.00). Another callout box labeled 'Line info' points to a table with columns for Line Number, Description, Quantity, and Line Amount.

### REPORT FEATURES

- The report will show Purchase Order information such as status, vendor, approval date, total, and line information
- Requisition Info at the top shows a purchase order’s overall information
- Line info at the bottom will show all the lines relevant to the purchase order and the information with it

### DRILL-THROUGH OPTIONS

Drill-through options are not available for this report.

# 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 [Run Report and Down Load section](#) 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).

C9000 - Suspense and Clearing	D9100 - Expense Clearing	91003 - Undistributed P-Card Exp	649.25	649.25
		91005 - Undistributed Trav CC Exp	0.00	0.00
		Total	649.25	649.25
Total			34,170,371.53	34,170,371.53
Total			0	0

Sep 29, 2021 1 12:03:59 PM

Top Page up Page down Bottom

**Report - Total**

Top Page up Page down Bottom

- 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.

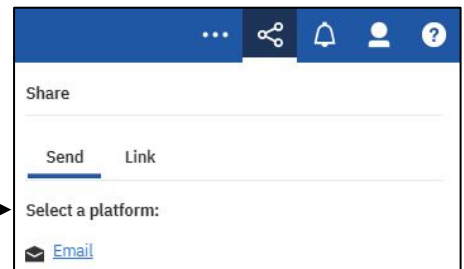
## Exporting Your Report Results

### 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

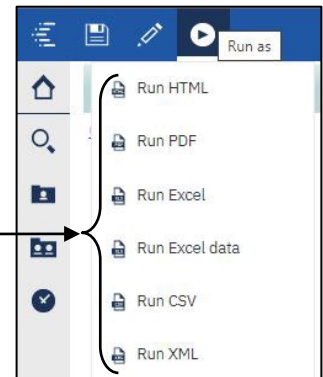
Click the “**Share**” symbol dropdown (next to the bell) on the upper right hand of the toolbar on your screen to select “**Email**”. Fill in the desired email address, any additional information, and your onscreen results will be emailed from within the Cognos program.



#### RUN REPORT AND DOWNLOAD OPTIONS

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

- HTML
- PDF
- Excel
- Excel Data
- CSV
- XML



## Error Results

### Run Report Error

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

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*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** on the “**Run as**” button on the upper left hand of the toolbar on your screen, and then **click** on the **Reset prompts and run** option (see note below for further instruction).