

Revised 11.17.2022

## How to Access Cognos Analytics V11

- 1. To obtain access, submit a Cognos Data Access Request for Finance information with Information Technology: https://it.cofc.edu/bi/Requests.php
- 2. If off-campus, end-user must be using VPN to access Cognos.
- 3. Log into MyPortal
- 4. Locate and click on the "Cognos ODS Refresh Status" tile. Note: Tile may be in a different location on "your" MyPortal.

Hello,	Banner Admin Pages (VPN Required)	ePrint (VPN Required) eProcure	tion Outlook
Employee Bashboard	- Finance Dashboard	OAKS	dmin CougarED
Banner Document Management	Couga Card Portal	Pictule Consta Const	
My Apps F.A.S.T.	Cognos ODS Refresh Status	Linkedin Learning Secure Share Qualitrics	Apps Anywhere
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## COLLEGE of CHARLESTON

5. A box will pop up and click "Log in to Cognos."



6. Enter user credentials and click "sign in."



7. Once logged in, follow the outlined "breadcrumb" to access any financial report



- 8. The following reports contain the most common, important information, in the Budget and Transaction Reports (Current Fiscal year) folder.
  - a. YTD Budget and Activity Statement Institutional Org Roll-Up Current Fiscal year
  - b. List of All Budget Entries Current Fiscal Year
  - c. List of Operating Expenses Current Fiscal Year
  - d. YTD Budget and Activity Statement Current Fiscal Year (Index Prompt)
- 9. How to export a report
  - a. Click the hyperlink to run the report in the default setting **OR**
  - b. Click the ellipses to export into a different format through "Run As"
    - i. Choose the required format

## ii. Click "Run"

	IBM Cognos Analyti	cs					Welcome
≏	Home	÷	End ortir > Institutio Repo > Budget and Tra	insacti	on R (Current	Fiscal Year] 🕀 🦷	r ↑↓
0	Search	Ŀ	Agency Fund Balances by School - Current Fiscal Year 9/23/2020 10:03 AM				^
1	My content	F	Agency Funds Detail - Current Fiscal Year 7/7/2020 9:55 AM				- 1
	Team content	1.	Agency Funds Summary - Current Fiscal Year 10/1/2018 3:29 PM				1
Ø	Recent	Ŀ	Encumbrance Activity - Current Fiscal Year 3/31/2020 10:23 AM				- 1
		Ŀ	GSA Year to Date Budget and Activity Statement - Current Fiscal 1/30/2019 8:37 AM	Year V	/ith 75013		
		Ŀ	List of All Budget Entries - Current Fiscal Year 11/20/2019 8:53 AM			[	
		Ŀ	List of All Transactions (Excluding Fringe Benefits) - Current Fisca 4/27/2020 3:12 PM	al Year		Click the thre ellipses to export different form	e t to a
		Ŀ	List of Encumbrance Activity - Current Fiscal Year 10/9/2019 1:09 PM			through "Run A	41 \S"
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	Agency Fund Balances by 9/23/2020 10.03 AM       Agency Funds Detail - Cu 7/7/2020 9:55 AM       Agency Funds Summary 10//2018 3:29 PM       Common Summary 10//2018 3:29 PM       Government Agency Funds Summary 10//2018 3:30 AM       List of All Transactions (E 4/27/2020 3:12 PM       List of Encumbrances Acti 10//2019 1:09 PM       List of Encumbrances - Curren 6/28/2020 4:05 PM       List of Encumbrances - Curren 6/28/2020 4:05 PM       List of Operating Budgeti	y School - Irrent Fisc - Current Fis and Activ - Current I xcluding F ivity - Curr tristal Ye Current Fiscal Ye Entries - C	Current Fiscal Year al Year fiscal Year rity Statement - Current Fiscal Year With 75013 Fiscal Year ringe Benefits) - Current Fiscal Year ent Fiscal Year cal Year cal Year cal Year cal Year cal Year		Run in backgroun  Excel Excel  Excel  For  For  For  For  For  For  For  For	d Choose required f	2 ethe ormat
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	<ul> <li>6/2/2020 10:55 AM</li> <li>List of Revenue - Current</li> <li>5/19/2020 11:35 AM</li> </ul>	Fiscal Yea	Я	幸 P 画 C	roperties		3
	List of Salary Expenses - 5/13/2019 10:44 AM	Current F	iscal Year	ы Ц С	reate shortcut		
	Non-Sufficient Funds Che 10/27/2020 12:28 PM	ecker			mbed		t,
	Open Purchase Orders 11/16/2020 10:51 AM			≪ s	hare		Run
	Recurring Institutional Ru	idnate hv F	Evenitive Level EV21	D 🗄	lelete		

10. If you have already run the report in the default HTML, you can click the "DVD" button to export to the required format

	and the second								
Run HTML	ear to Date Budget and	Activity Stat	ement						
Run PDF	20 4:15:27 PM 2								
Pun Excel	Account	Recurring Budget	Non-Recurring Budget Adjustments	Total Budget	Year-to-Date Activity	Encumbrances	Available Balance		
Run Excel	Department	F	und - Organizati	on	- Program				
Run Excel data	kpenses								
	310111 - Unclassified Positions	0.00	0.00	0.00	0.00	0.00	0.00		
Run CSV	310114 - Dual Employment-Concurrent	0.00	7.333.00	7.333.00	6.666.70	666.67	-0.37		
	31021 - Classified Pool	0.00	0.00	0.00	0.00	0.00	0.0		
Bun XML	310210 - Classified Positions	577.743.00	-52.076.00	525,667.00	213.390.57	312,518.72	-242.2		
	31030 - Student Employment	18,010.00	0.00	18,010.00	0.00	0.00	18,010.0		
Reset prompts and run	310320 - Non Work-Study	0.00	0.00	0.00	0.00	0.00	0.0		
/ neser prompts and run		595,753.00	-44,743.00	551,010.00	220,057.27	313,185.39	17,767.3		
62 - Fringe and Health Benefits	62000 - Fringe and Health Benefits	0.00	91,718.65	91,718.65	0.00	0.00	91,718.6		
	620110 - State Health Benefit	0.00	0.00	0.00	26,321.87	0.00	-26,321.87		
	620111 - State Dental Plan Benefit	0.00	0.00	0.00	518.98	0.00	-518.9		
	620116 - Unemployment Insurance Benefit	0.00	0.00	0.00	44.40	0.00	-44.4		
	620210 - SCRS Retirement Benefits	0.00	0.00	0.00	46,609.17	0.00	-46,609.1		
	620211 - PORS Retirement	0.00	0.00	0.00	0.00	0.00	0.0		
	620212 - SCRS Death Benefit	0.00	0.00	0.00	330.08	0.00	-330.04		
	620214 - TIAA ORP Retirement Benefit	0.00	0.00	0.00	333.30	0.00	-333.3		
	620215 - Hartford ORP Retirement Benefit	0.00	0.00	0.00	721.89	0.00	-721.89		
	620310 - Workers Compensation	0.00	0.00	0.00	954.95	0.00	-954.9		
	620410 - FICA Employer Match	0.00	0.00	0.00	15.884.01	0.00	-15,884.01		
Total 62 - Fringe and Health E	lenefits	0.00	91,718.65	91,718.65	91,718.65	0.00	0.0		
Total 60 - Salary and W	/age Expenses	595,753.00	46,975.65	642,728.65	311,775.92	313,185.39	17,767.34		
70 - Expenditures									
71 - Contractual Services	71010 - Contractual Services	5.978.00	0.00	5.978.00	0.00	0.00	5,978.00		
	710410 - Telephone-Land Lines	0.00	0.00	0.00	1.085.48	0.00	-1,085.48		
	710412 - Cellular and Paging Services	0.00	0.00	0.00	865.32	0.00	-865.32		
Total 71 Contractual Service		5 978 00	0.00	5 978 00	1 950 80	0.00	4 027 20		

Questions: <u>Budget@cofc.edu</u>