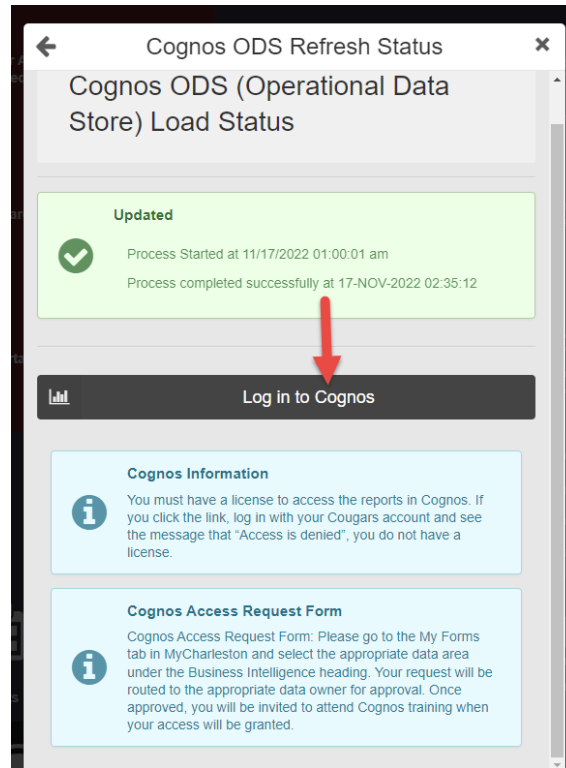


How to Access Cognos Analytics V11

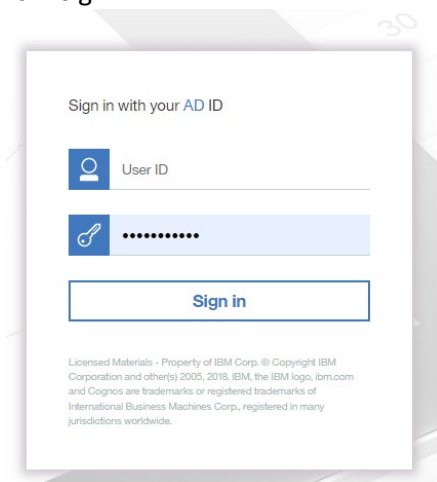
1. To obtain access, submit a Cognos Data Access Request for Finance information with Information Technology: <https://it.cofc.edu/bi/Requests.php>
2. If off-campus, end-user must be using VPN to access Cognos.
3. Log into MyPortal
4. Locate and click on the “Cognos ODS Refresh Status” tile. Note: Tile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



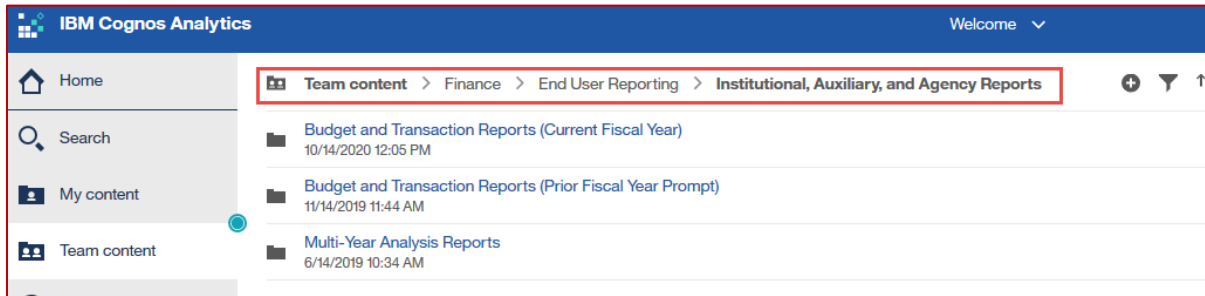
5. A box will pop up and click “Log in to Cognos.”



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"

The screenshot displays the IBM Cognos Analytics interface. At the top, the breadcrumb navigation shows: Home > End ... ortir > Institutio ... Repo > Budget and Transaction R ... (Current Fiscal Year). A list of reports is shown, including 'Agency Fund Balances by School - Current Fiscal Year', 'Agency Funds Detail - Current Fiscal Year', 'Agency Funds Summary - Current Fiscal Year', 'Encumbrance Activity - Current Fiscal Year', 'GSA Year to Date Budget and Activity Statement - Current Fiscal Year With 75013', 'List of All Budget Entries - Current Fiscal Year', 'List of All Transactions (Excluding Fringe Benefits) - Current Fiscal Year', 'List of Encumbrance Activity - Current Fiscal Year', 'List of Encumbrances - Current Fiscal Year', 'List of Expenses - Current Fiscal Year', and 'List of Operating Budget Entries - Current Fiscal Year'. A callout box with a red arrow points to the three-dot menu icon of the 'List of Operating Budget Entries' report, containing the text: 'Click the three ellipses to export to a different format through "Run As"'. Below the report list, the 'Run as' dialog box is open. It features a 'Run in background' toggle switch. Under the heading 'Run as', there are radio button options for 'Excel', 'Excel Data', 'PDF', 'HTML', 'CSV', and 'XML'. A callout box with a red arrow points to the 'Excel' option, containing the text: 'Choose the required format'. The 'Prompt me' checkbox is checked. At the bottom of the dialog, there is a 'Run' button. A callout box with a red arrow points to this button, containing the number '3'. A red arrow labeled '1' points to the 'Run as' option in the report's context menu. A red arrow labeled '2' points to the 'Excel' radio button.

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

YTD Budget and Activity St ... Fiscal Year (Index Prompt) ▼

1

2

Run HTML

Run PDF

Run Excel

Run Excel data

Run CSV

Run XML

Reset prompts and run

Account	Recurring Budget	Non-Recurring Budget Adjustments	Total Budget	Year-to-Date Activity	Encumbrances	Available Balance
60 - Salary and Wage Expenses						
310111 - Unclassified Positions	0.00	0.00	0.00	0.00	0.00	0.00
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	0.00
310210 - Classified Positions	577,743.00	-52,076.00	525,667.00	213,390.57	312,518.72	-242.29
31030 - Student Employment	18,010.00	0.00	18,010.00	0.00	0.00	18,010.00
310320 - Non Work-Study	0.00	0.00	0.00	0.00	0.00	0.00
Total 60 - Salary and Wage Expenses	595,753.00	-44,743.00	551,010.00	220,057.27	313,185.39	17,767.34
62 - Fringe and Health Benefits						
62000 - Fringe and Health Benefits	0.00	91,718.65	91,718.65	0.00	0.00	91,718.65
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	-518.98
620116 - Unemployment Insurance Benefit	0.00	0.00	0.00	44.40	0.00	-44.40
620210 - SCRS Retirement Benefits	0.00	0.00	0.00	46,609.17	0.00	-46,609.17
620211 - PORS Retirement	0.00	0.00	0.00	0.00	0.00	0.00
620212 - SCRS Death Benefit	0.00	0.00	0.00	330.08	0.00	-330.08
620214 - TIAA ORP Retirement Benefit	0.00	0.00	0.00	333.30	0.00	-333.30
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	-954.95
620410 - FICA Employer Match	0.00	0.00	0.00	15,684.01	0.00	-15,684.01
Total 62 - Fringe and Health Benefits	0.00	91,718.65	91,718.65	91,718.65	0.00	0.00
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 Services	5,978.00	0.00	5,978.00	1,950.80	0.00	4,027.20

Questions: Budget@cofc.edu