

List of Available Reports and Access Instructions

List of Reports Related to the PI Compliance Reports

1. PI Compliance Report – Prior Month
 - a. Mimics the report a PI will receive each month
 - b. Contains the exact information, in the exact format the PI receives each month
 - c. Does not contain the Confirmation of Review Link the PI uses to log their review with the Sponsored Program's Office
 - d. Run report to PDF and send to a PI if they prefer that format

2. PI Compliance Report – Pick Dates
 - a. Report has the same format of the regular PI Compliance Report, but allows the user to choose the time-frame of expenses shown
 - b. Expand the time-frame to show a longer time period in one report
 - c. Show the status of a project at an earlier date than current

3. PI Log Report – Department Non-Reviewed
 - a. Shows the PIs and the Month of Expenses they have not reviewed, by department
 - b. Use this report to get an up-to-date list of outstanding reports

4. PI Compliance Distribution Report for Depts – with Link
 - a. Contains the information a PI received in a previous month
 - b. Does contain the Confirmation of Review Link for the information contained in the report
 - c. Must be in HTML format for the link to connect to the OSPA Log
 - d. Use this to give PIs a copy of an outstanding report needing their review

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How-To Access Reports

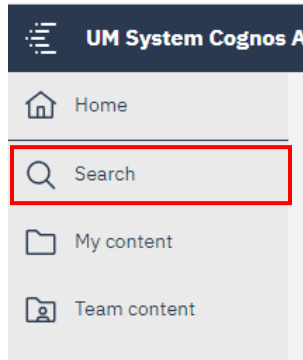
1. Go to: reports.umsystem.edu OR Login to WebApps and Click Cognos Reporting



Please select from the list below to proceed. Move your cursor over each item for a description of the application.

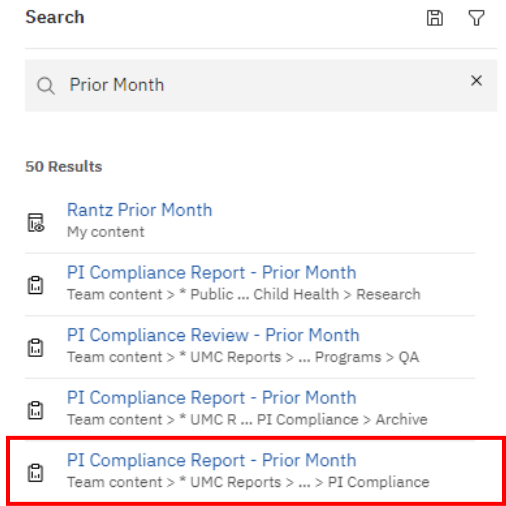
<ul style="list-style-type: none">▪ Cognos Budget Reports Portal▪ Cognos Reporting▪ Employee Directory▪ Employee Information▪ FIN Authorization▪ FIN CRR/ARR▪ FIN Finance Structure▪ FIN Financial Reports▪ FIN Grant Searchable Database▪ FIN Journal Entry	<ul style="list-style-type: none">▪ FIN MoCode▪ FIN Production-FSPRD▪ FIN Reporting-FSRPT▪ FIN Search Options▪ FIN Supplier Request Form▪ FIN Training Documents▪ FIN Travel and Expense-HR Supervisor Rpt▪ FIN Travel and Expenses▪ FIN Trip Optimizer▪ HR ISIT Dashboard	<ul style="list-style-type: none">▪ HR PAF▪ HR PRODUCTION Database▪ HR Reporting Database▪ HR Search Options▪ HR WebTime▪ Hyperion Planning▪ myHR▪ PaymentNet Reconciliation▪ Test
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2. Login to Cognos when prompted
3. Enter UM-AD*yourUserName* and *Your Password* OR yourUserName@umsystem.edu and *Your Password*
4. Use the Search option found on the upper left-hand of the screen

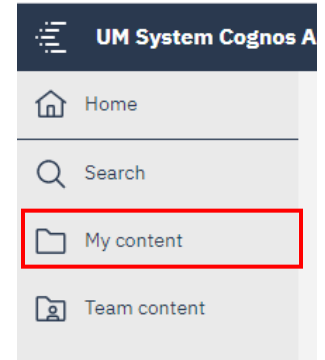


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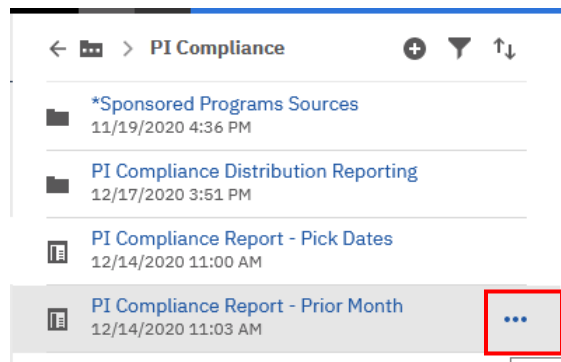
- 5. Type in the Type of Report you want to use. Hit Enter
 - a. Note: Look for the one with PI Compliance listed underneath



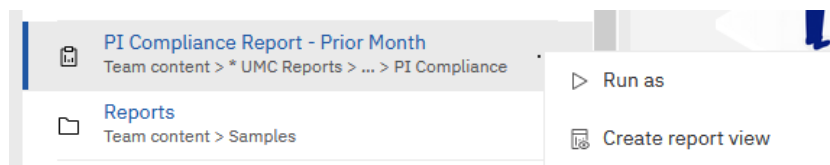
- 6. You can also access the reports by following the below path. Click the Team content folder found on the left side of the screen to start.
 - a. Team Content Folder -> *UMC Reports -> Sponsored Programs -> PI Compliance



- 7. Once you see the report you want to use, Click the Ellipsis on the far right of the report you want to run

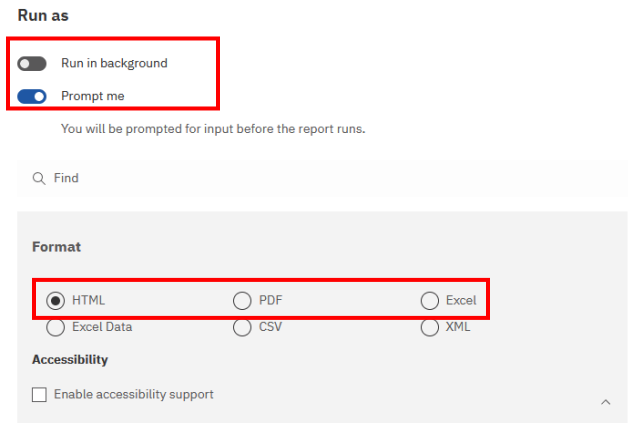


- 8. From here you can either Run the Report or Create a View to save to your personal folder



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- a. Run as
 - i. Run in background allows you the ability to email it to you or your team
 - ii. Always leave 'Prompt me' selected
 - iii. Choose whether you run in a web (HTML), PDF, or Excel format



- b. Create Report View – click the top folder to save to your own personal folder and rename as necessary

