## 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

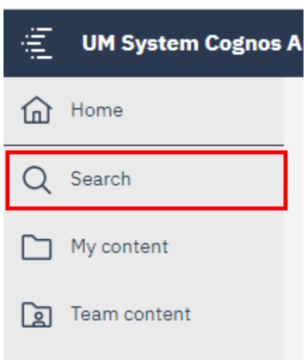
3. PI Log Report – Department Non-Reviewed
    a. Shows the PIs and the Month of Expenses they have not reviewed, by department
    b. Use this report to get an up-to-date list of outstanding reports

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

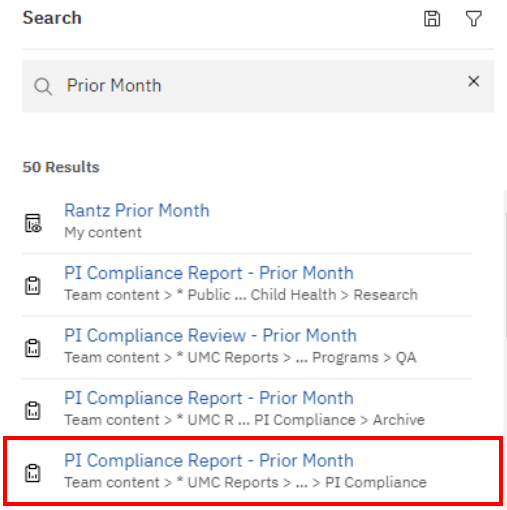
## How-To Access Reports

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

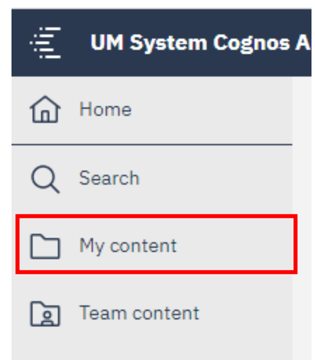

2. Login to Cognos when prompted
3. Enter UM-AD*yourUserName* and *Your Password* OR *yourUserName@umsystem.edu* and *Your Password*
4. Use the Search option found on the upper left-hand of the screen



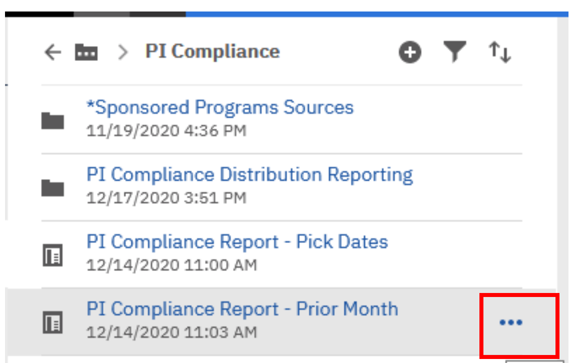
5. Type in the Type of Report you want to use. Hit Enter
    a. Note: Look for the one with PI Compliance listed underneath



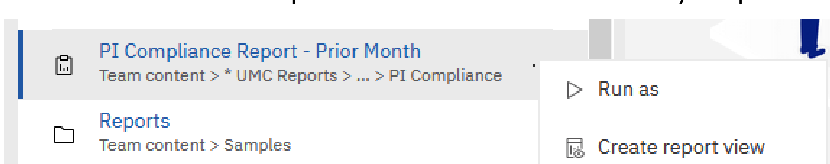

6. You can also access the reports by following the below path. Click the Team content folder found on the left side of the screen to start.
    a. Team Content Folder -> *UMC Reports -> Sponsored Programs -> PI Compliance



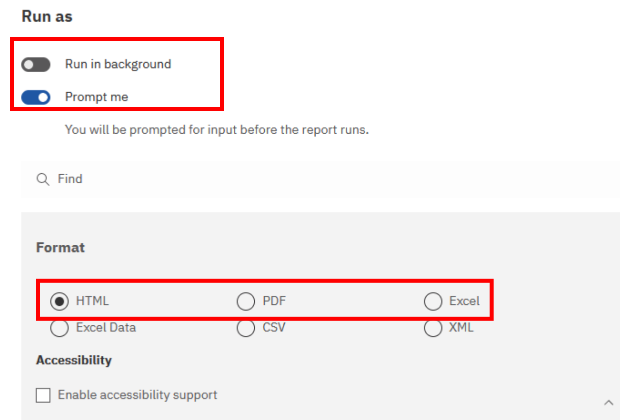

7. Once you see the report you want to use, Click the Ellipsis on the far right of the report you want to run




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



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 (HMTL), PDF, or Excel format




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