Each month you will receive an email, like the one below, that provides a link to a personalized report with information for the previous month’s transactions for all your active projects. Completing the review of the information contained in the report is required by UM Policy 27002: ‘Allowable Costs and Cost Principles’.

*After you login to Cognos, please do not try to navigate around the website. Do not click “Refresh” or click the Home Icon. The only accurate way to access your information is through the link found in the email sent each month.

1. When you receive the email, click the link at the bottom of the email that contains your name.

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A New Version of PI Compliance Review Report is Available

Hello,

Below is the link to your PI Compliance Review Report for the previous month’s expenses on your active sponsored activity projects. Your review of this report will complete the requirement of timely project expenditure review as stated in UM Policy 27002 ‘Allowable Costs and Cost Principles’.

Please access, review, and confirm your review of the report by the 12th of next month. You will submit your confirmation of review by clicking a link at the end of the report.

If you have any questions about the transactions or find any necessary changes, please work with your departmental fiscal staff to make corrections. All changes will be reflected on a future report.

If you have any issues accessing or using the report, please email muresearchopensource1@umsystem.edu
2. After clicking the link, you will be redirected to your web browser and prompted to login to Cognos.
   a. You should already have access to Cognos and the ability to view all necessary information
   b. Input UM-AD\ then your Username & Password OR username@umsystem.edu & Password
3. Your report will appear
   a. Each report will contain information for all your projects, separated by project

4. Each project will contain the following information:
   a. Budget vs Actuals breakdown as of the end the previous month
   b. Payroll transactions posted the previous month with a % of salary for that employee
   c. Benefit expenses posted to the project, related to the salary
   d. Expenses that were charged to the project through the T&E module in PeopleSoft
   e. All other expenses posted to the project the previous month

5. Once you have reviewed all the information on the screen click, Page down at the bottom
   a. You can use all of the buttons on the very bottom of a page to navigate through the report
6. After the Transactions Information, a new project will begin.

7. After you have reviewed all of the information for all your projects and you have reached the end of the report, there will be a box containing your name and Empl ID with a link.

8. Click the link to submit your confirmation that you have Received and Reviewed the information.

9. A confirmation screen will pop up to show your review has been logged by our office.
10. We will send reminder emails to people who have not reviewed prior to the next report being sent.

11. Note the link in the email will only take you to the current month’s report.
   a. If you look at the email you received 3 months ago and click the link contained, you will get an error message.
   b. Reach out to your department staff to access a report received more than 1 month ago.

12. Every 3 months, we will look at who has not completed a review of their report and reach out to department staff to ensure the report is reviewed.