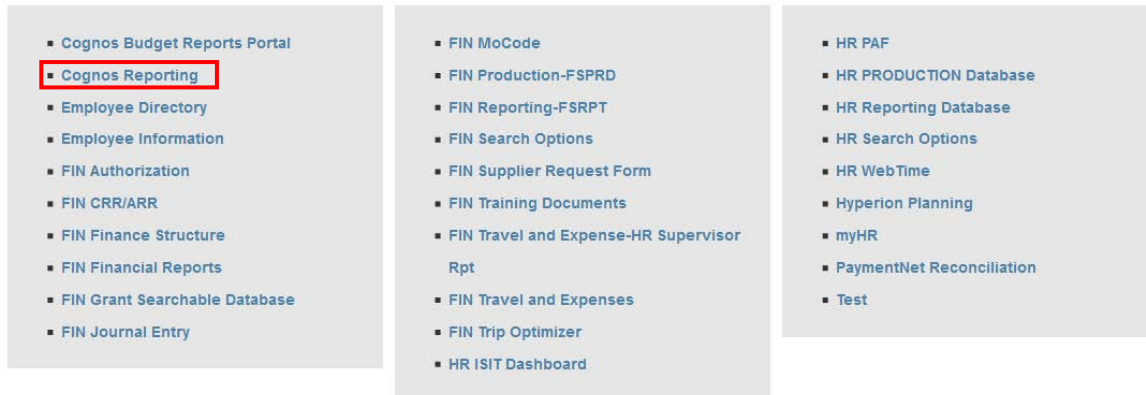


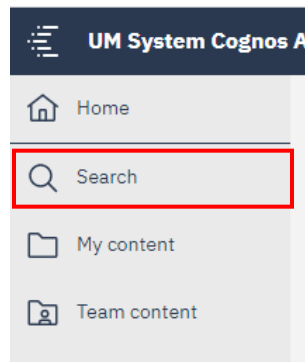
1. Go to: reports.umsystem.edu OR Login to WebApps and Click Cognos Reporting



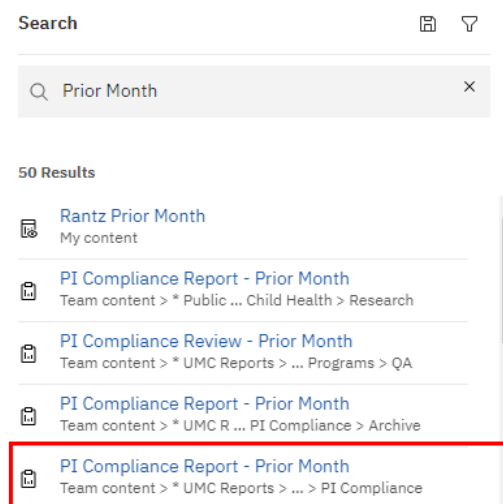
Please select from the list below to proceed. Move your cursor over each item for a description of the application.



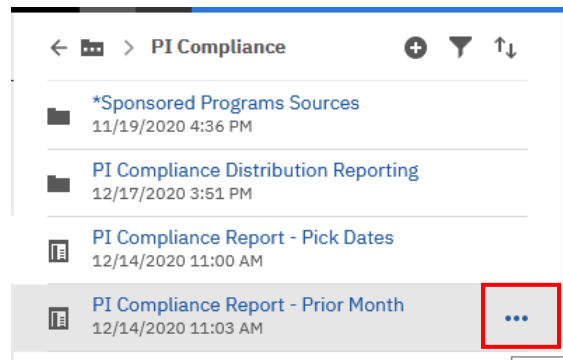
2. Login to Cognos when prompted
3. Enter UM-AD\yourUserName and Your Password OR yourUserName@umsystem.edu and Your Password
4. Use the Search option found on the upper left-hand of the screen



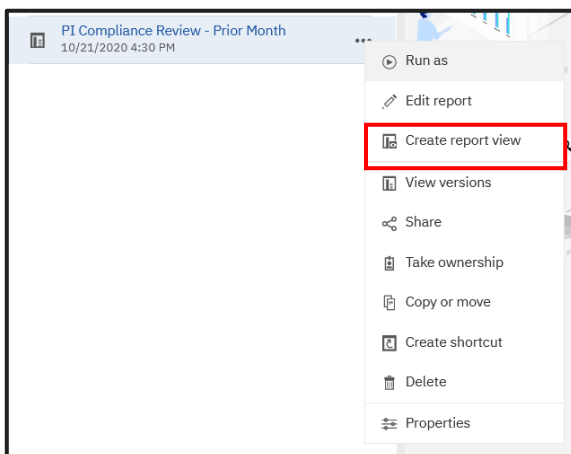
5. Type in the Type of Report you want to use.
 - a. Hit Enter
 - b. Note: Look for the one with PI Compliance listed underneath



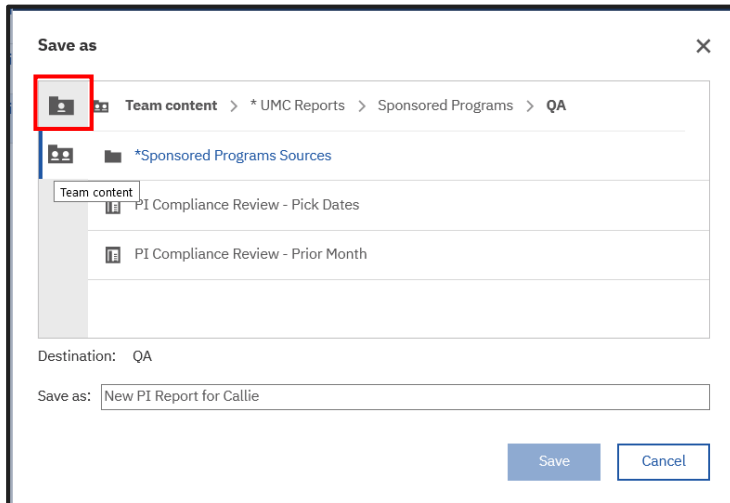
6. You can also access the reports by following the below path. Click the Team content folder found on the left side of the screen to start.
 - a. Team Content Folder -> *UMC Reports -> Sponsored Programs -> PI Compliance
7. Click the Ellipsis on the far right of the report you want to run



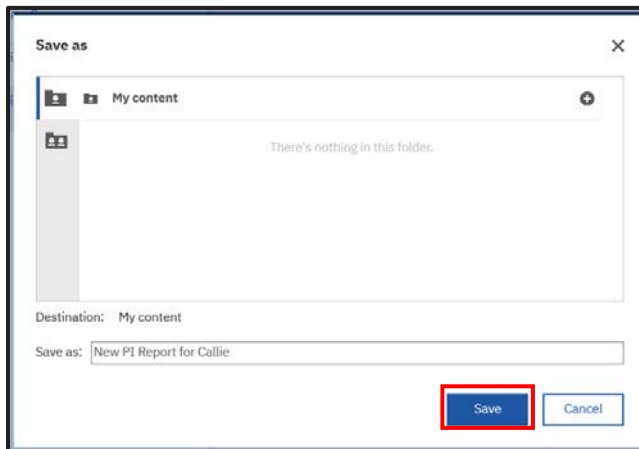
8. Click 'Create Report View'
 - a. **NOTE: You will need to create a new report view for each scheduled report you create**
 - b. **So, if you have 3 PIs and you want to create a scheduled run for each. You will need 3 different report views, and 3 separate schedules.**



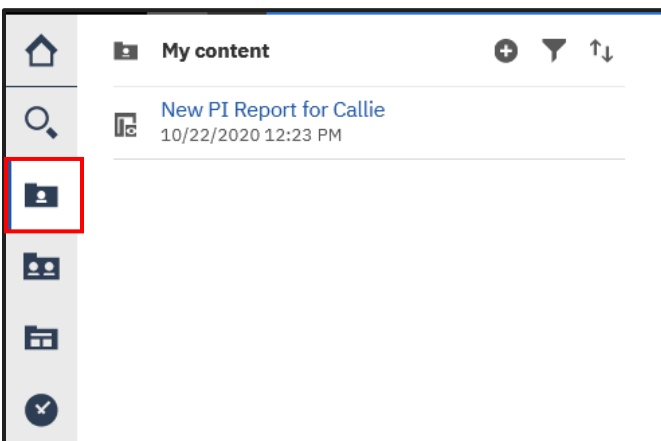
9. Enter whatever you would like the report name to be in the 'Save As' Field. Click the Top Folder Icon
10. The top folder is your own personal folder. This is the best place to store and access your information



11. Click Save

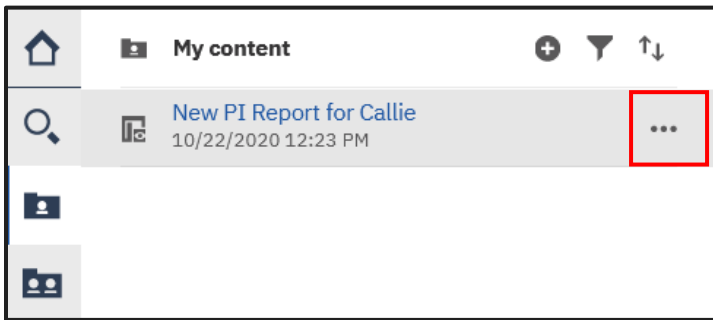


12. Now if you click the My Content Folder Icon on the far left. You can see the newly saved report

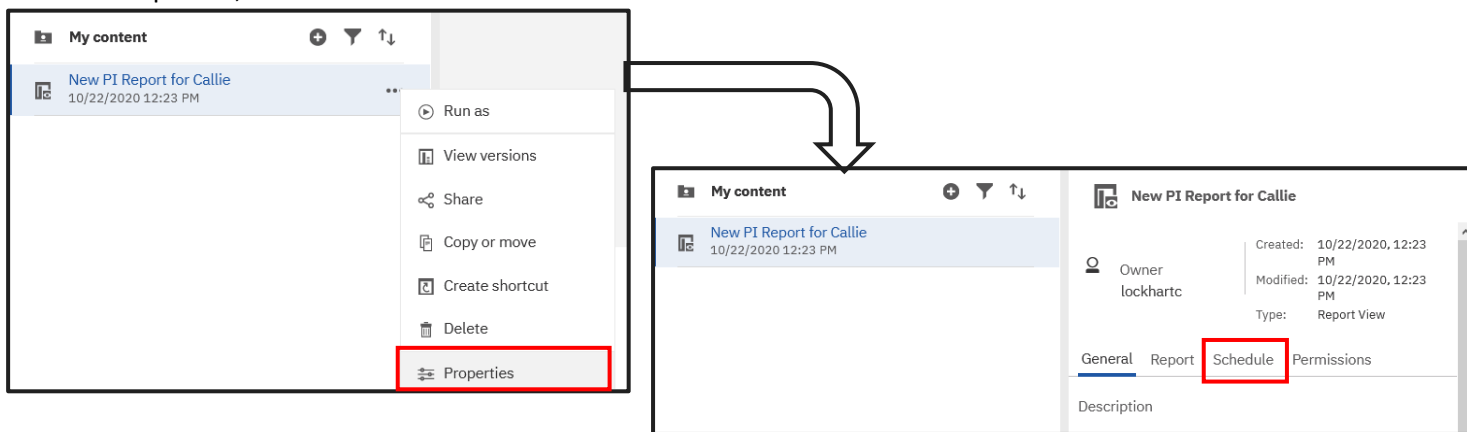


Schedule a Report

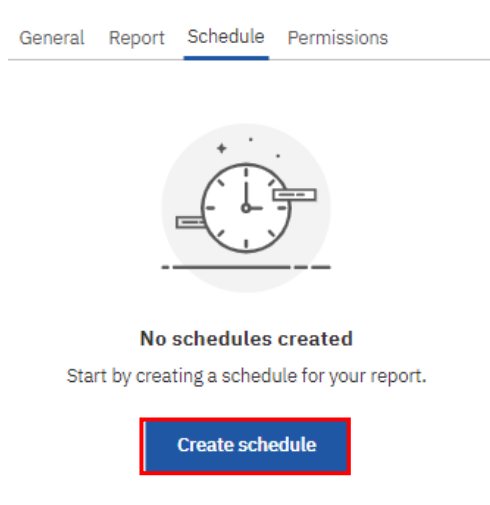
13. Hover over the Report title, to see the ellipsis again. Click the ellipsis



14. Click Properties, Click Schedule



15. Click Create New Schedule



16. Select whether report will be run on a daily, weekly, monthly, or yearly basis

Frequency

Type: Weekly

Repeat every: Daily

Repeat on: Monthly S S

Daily time interval

17. For a monthly report set the frequency to receive the report in the Repeat Every Section, and set what day you want the report to run in the Schedule by/Day Section

Type: Monthly

Repeat every: 1 month

Schedule by: Day of the month

Day: 15th

Daily time interval ⓘ

18. Set the start and end dates for the reports to run. Start being the first day to receive the report and the end being the last day the report will run.

- a. Please do not click the 'No End Date' box
- b. Schedule can be edited/updated at any time

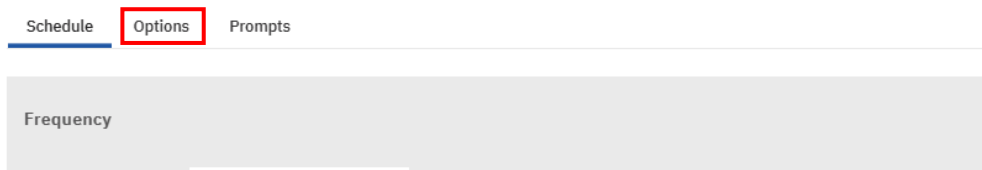
Period

Start: 2021-04-08 2:15 PM

End: 2022-06-01 2:15 PM

No end date

19. Scroll to the top of the screen. Click 'Options'



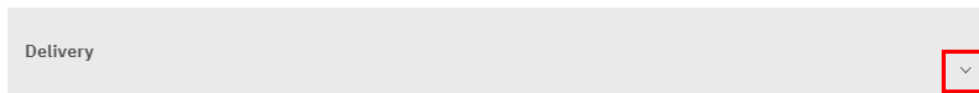
20. Select the format of the report:

a. Format: HTML vs PDF vs EXCEL vs Other

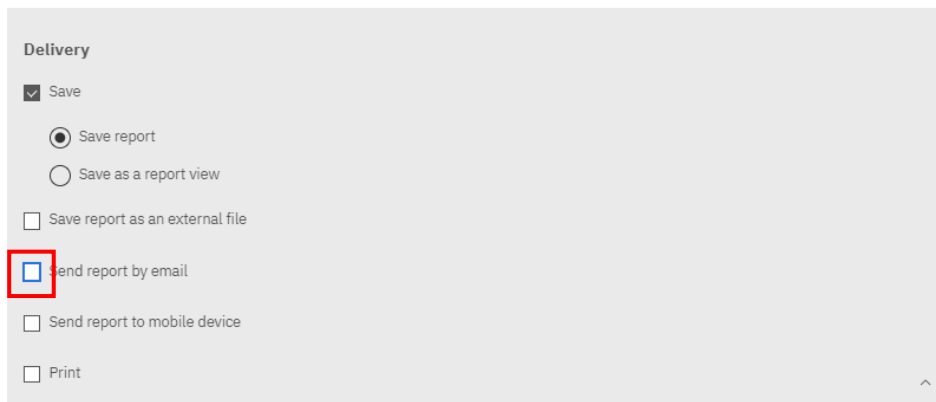


21. Scroll down to set Delivery: Most likely to Email

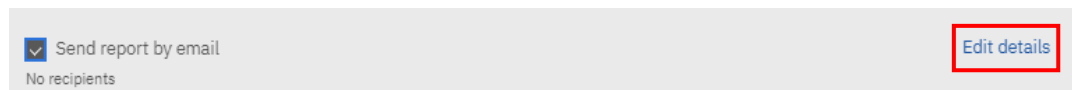
a. Click on the down arrow on the delivery options



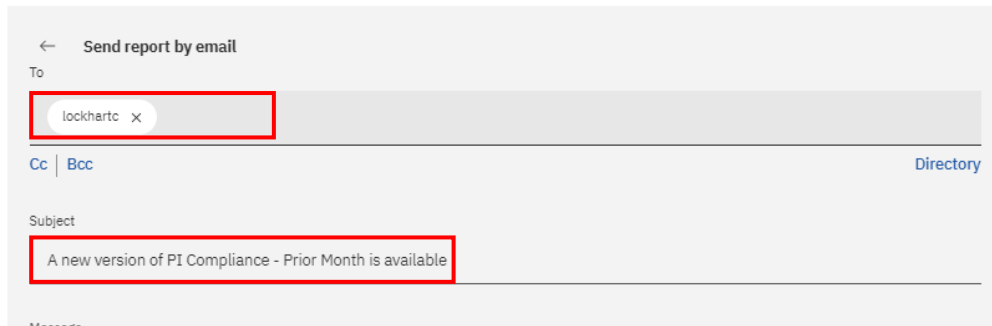
b. Check the Send report by email box



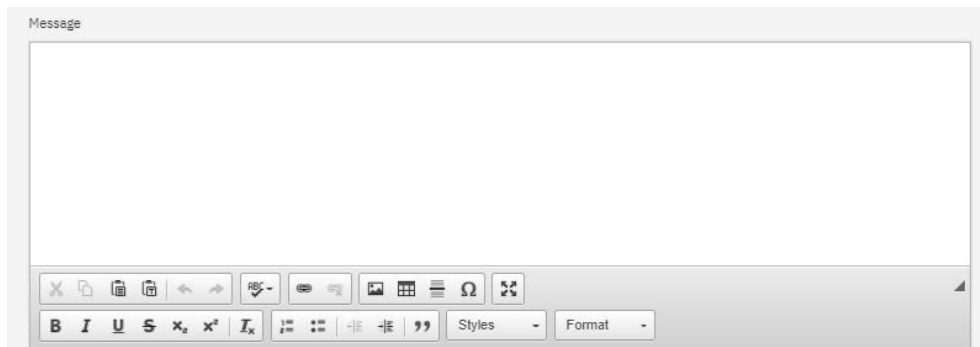
c. Click Edit Details



22. Enter the email addresses of the people you want to receive the report, and enter unique Subject Title

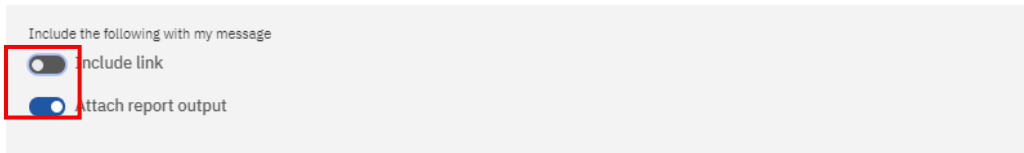


23. Scroll down and type on whatever message you would like to include in the email body



24. Finally, click how you would like to receive the report. As a link that will direct the user to Cognos or an attached file

a. For HTML output, I recommend Link. For PDF Attach



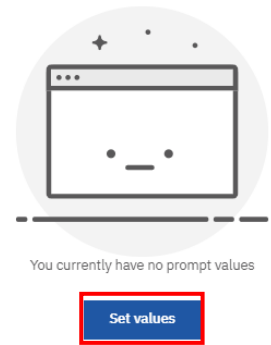
25. Scroll back up to the top. Click Prompts



Schedule a Report

26. Click Set Values.

- a. This will direct you to the prompt screen where you can set the filters for the report output, each time the report is sent



Finalize Schedule Set-up: After you click finish on the prompt screen, it will direct you to a confirmation screen. If everything looks good Click Save in bottom righthand corner.

Schedule Options **Prompts**

Q Find ↑↓ 🗑️ ✎️

Parameter name	Parameter value
Select Dept	Chemical & Biochemical Engrg

English (United States) ▼

Save Cancel

A confirmation screen will show the schedule information:

Report view of PI Compli ... Prior Month

Owner: lockhartc | Created: 3/12/2021, 12:55 PM
Modified: 3/12/2021, 12:55 PM
Type: Report View

General Report **Schedule** Permissions

Enable Edit Delete

Summary
Run every 1 week(s) from March 12, 2021 at 12:55 PM on Friday.