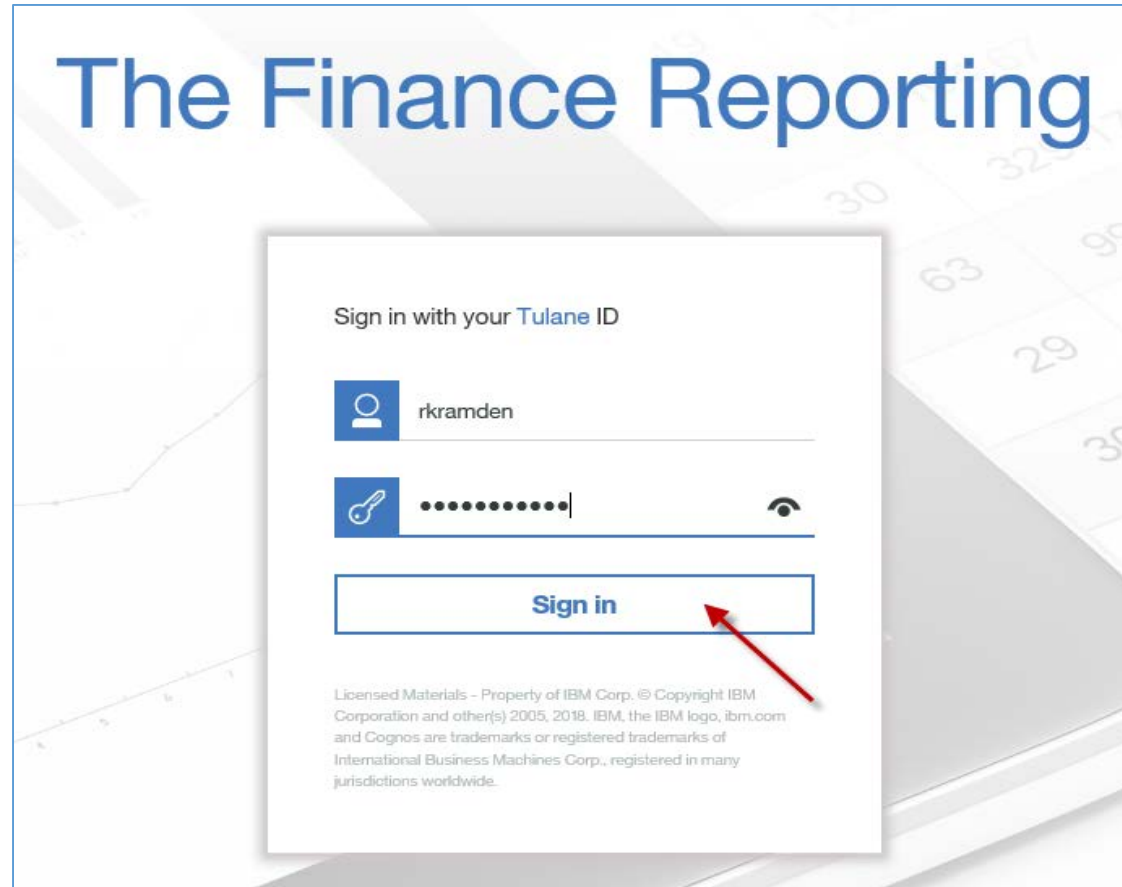


Navigating Cognos Upgrade: TAMS Reports

- Only the appearance of the Log In screen and the navigation to select reports have changed
- The Search Parameter screen to run each report has not changed
- The reports have not changed

Signing In



The Finance Reporting

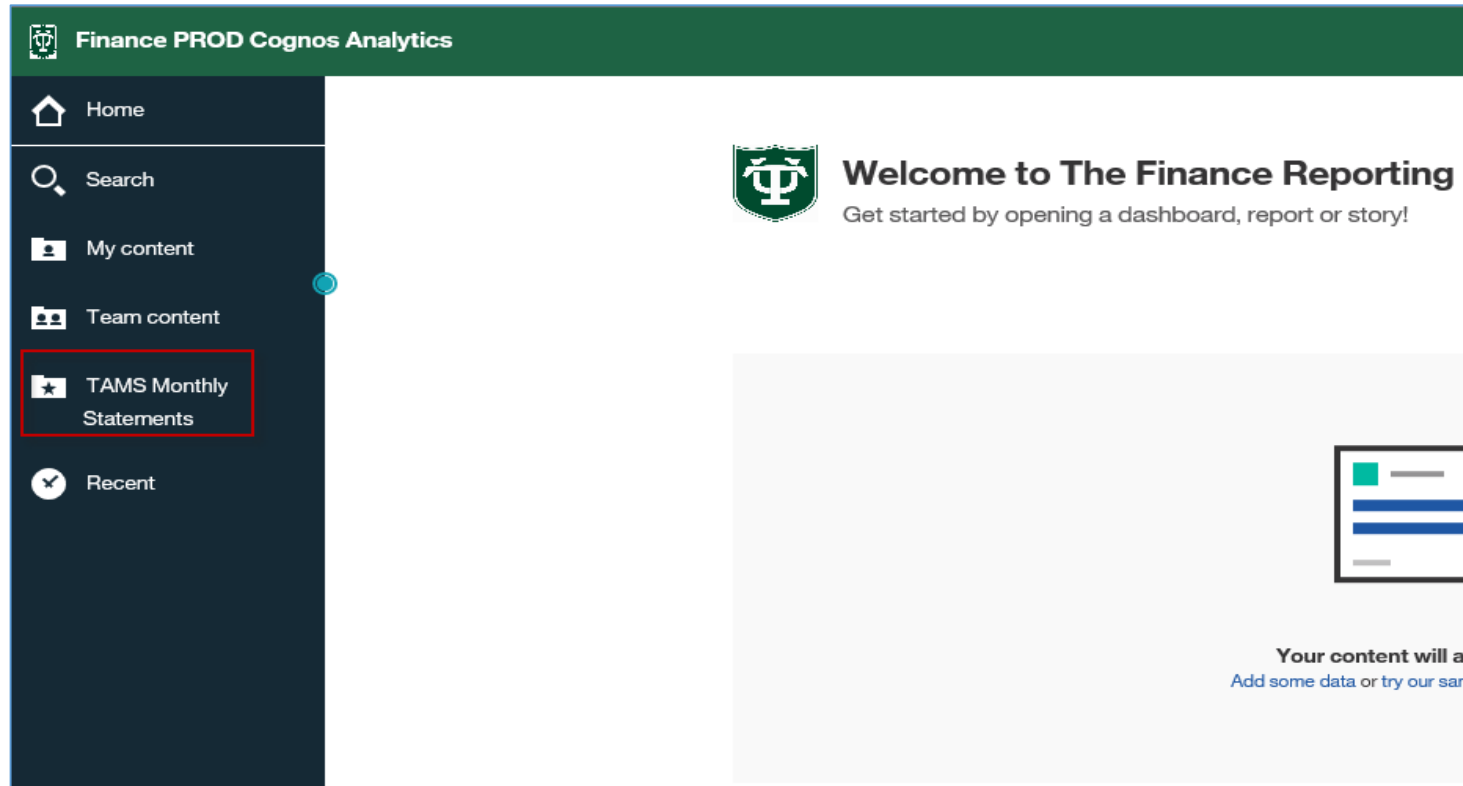
Sign in with your Tulane ID

Sign in

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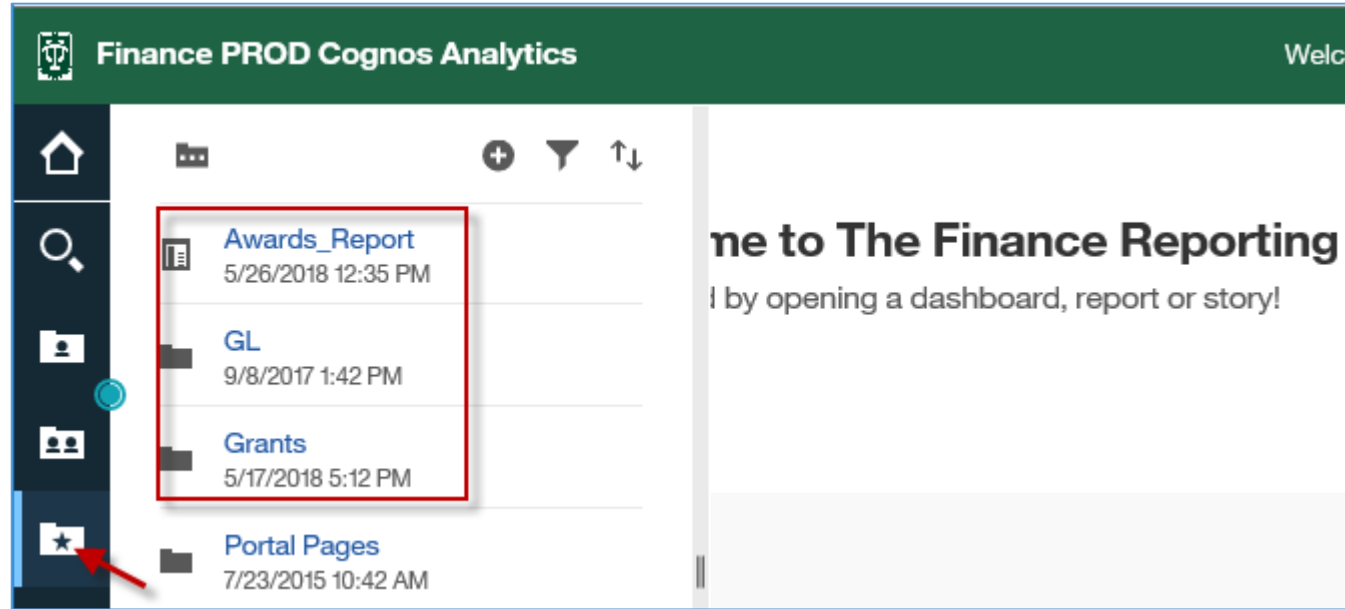
- Log in to Cognos via the following url: <https://financials.tulane.edu/>
 - If you have Cognos bookmarked, you may need to update it
- Type your user ID and password and click Sign In

Opening TAMS Monthly Statements



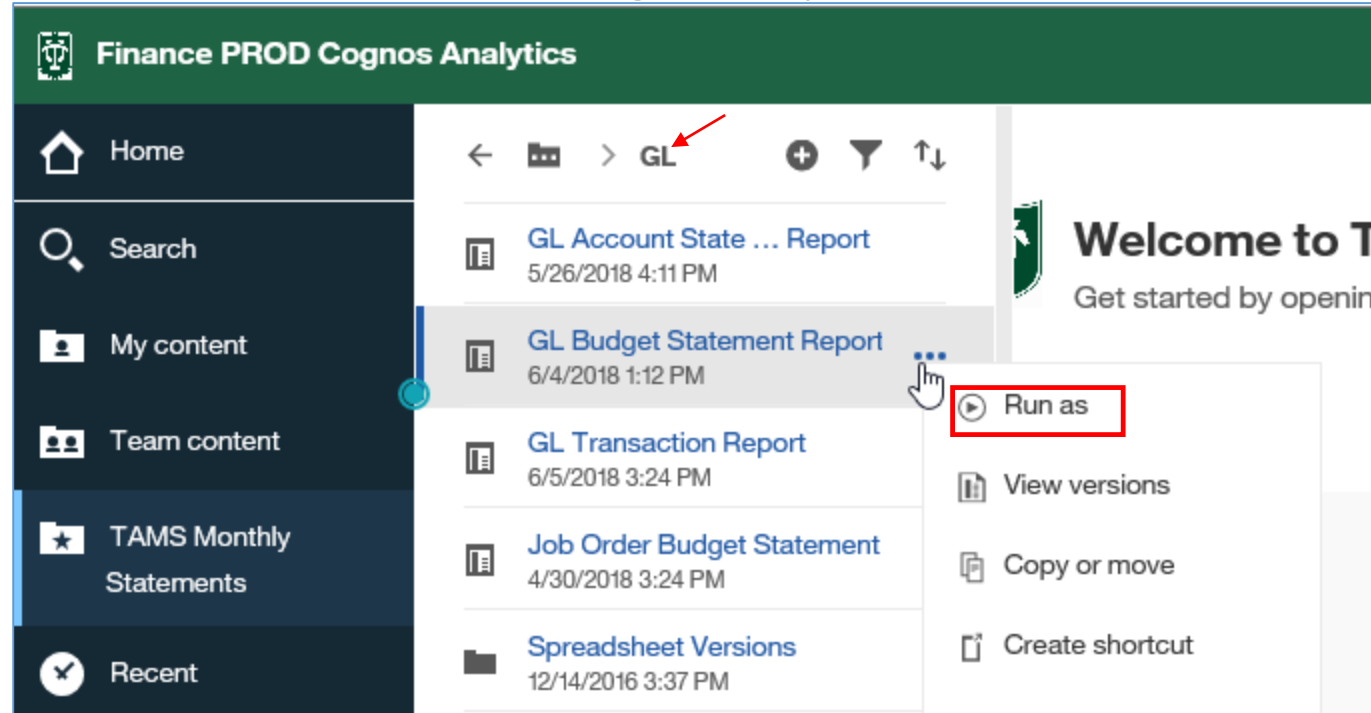
- Click TAMS Monthly Statements in the sidebar to open the TAMS report groups that you have access to
- Depending on how you open Cognos, the folder icons in the sidebar may appear without the descriptions; in that case, click on the folder with the embedded star

Choosing Report Group



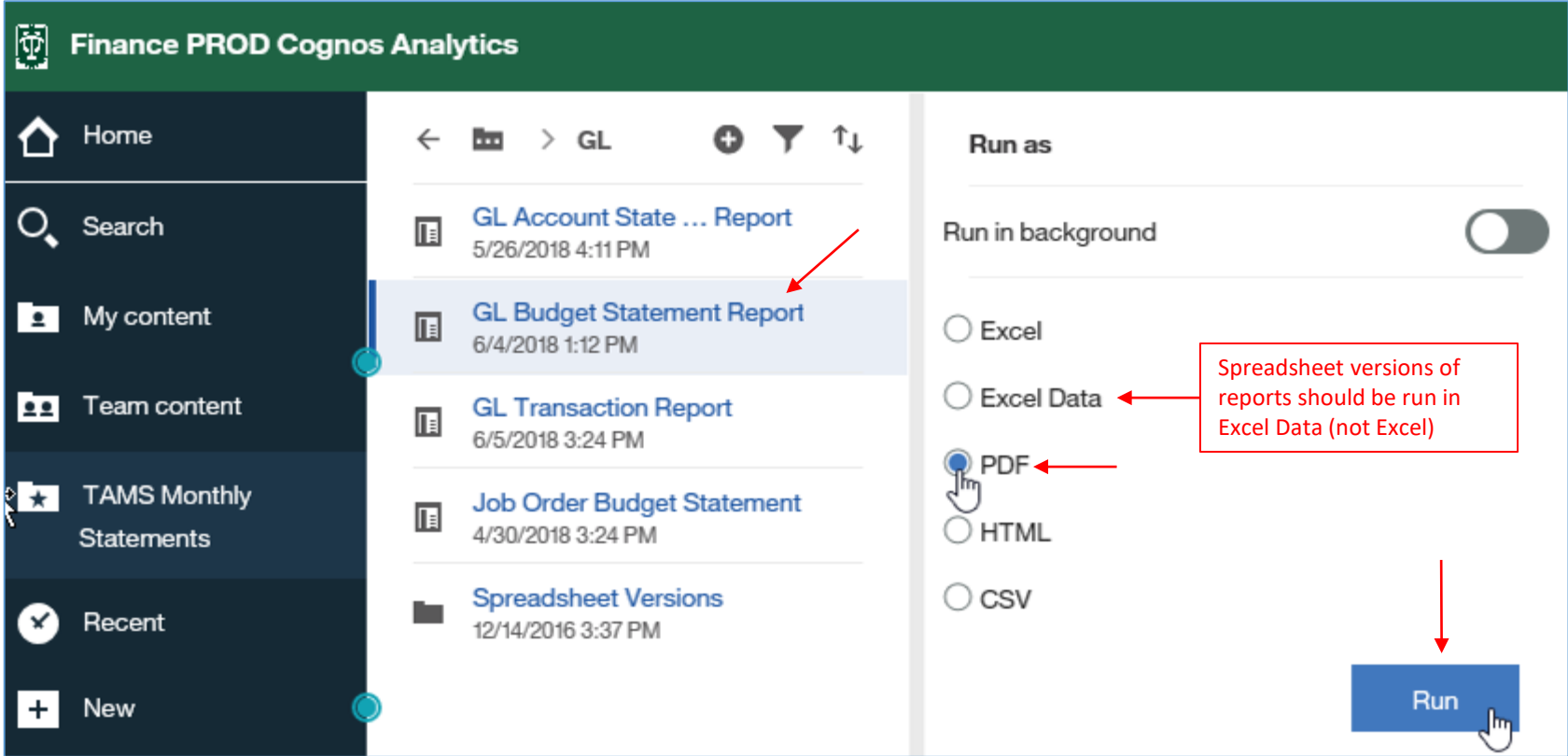
- Click on the report group folder to open reports related to that group (i.e. GL or Grants)

Running a Report



- For this example, we chose the GL report group
- Click on the report name to open the search parameters screen of the report
- NEW FEATURE IN THE UPGRADE: Alternately, you can click on the three dots adjacent to the report name to choose the format (i.e. pdf or Excel) in which you'd like the report to open by clicking "Run as" from the list
 - In the previous version of Cognos, you could not select a format until after the report was run

Running a Report



- For this example, we chose the GL Budget Statement which is formatted for pdf
 - All reports are formatted for pdf except the spreadsheet versions which are formatted for Excel Data
 - IMPORTANT: Always run spreadsheet versions of reports as Excel Data (not Excel)
- Click Run

Select Parameters

Please Select a Value for Period:

- APR-18
- MAR-18
- FEB-18
- JAN-18
- DEC-17
- NOV-17
- OCT-17
- SEP-17
- AUG-17
- JUL-17
- CLOSE5-17

[Select all](#) [Deselect all](#)

Exclude Accounts with Zero Balance: NO YES

Please Select Organization Number:

Keywords:
Type one or more keywords separated by spaces.

Search

[Options](#)

Results:

[Select all](#) [Deselect all](#)

Choice:

[Select all](#) [Deselect all](#)

Please Select Account Number:

Keywords:
Type one or more keywords separated by spaces.

221017 Search

[Options](#)

Results:

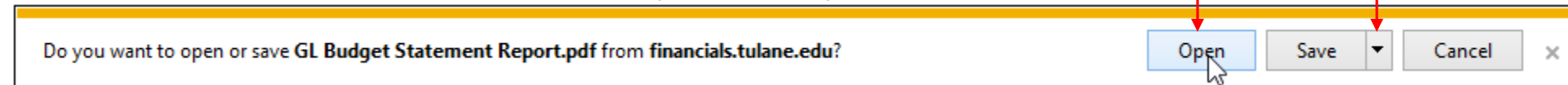
[221017-ACCOUNTING OFFICE ACCO](#) [Insert](#)

Choice:

[221017-ACCOUNTING OFFICE ACCO](#)

- Include your search parameters as normal
 - This process has not changed from the previous version of Cognos
- Click Finish

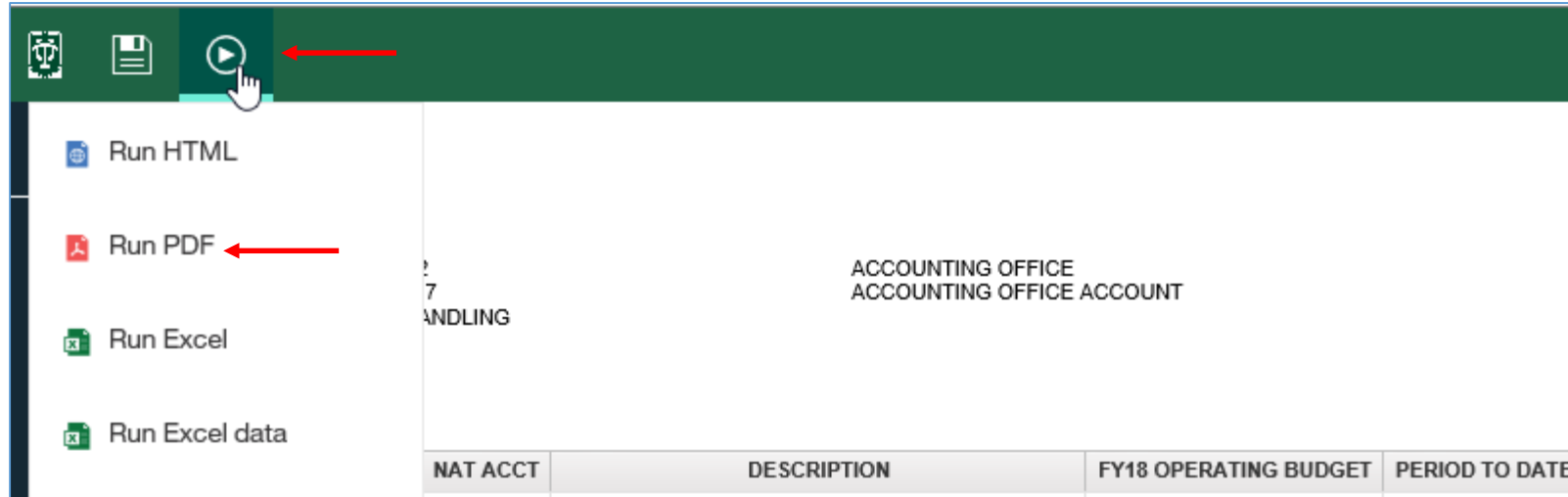
Open Report



DATE Jun 6, 2018 TIME 12:27:15	TULANE UNIVERSITY TULANE ACCOUNTING MANAGEMENT SYSTEM BUDGET STATEMENT PERIOD: APR-18					
ORGANIZATION 13122 ACCOUNT 221017 RESPONSIBLE PERSON	ACCOUNTING OFFICE ACCOUNTING OFFICE ACCOUNT					
DEPT USE	NAT ACCT	DESCRIPTION	FY18 OPERATING BUDGET	PERIOD TO DATE	YEAR TO DATE	BUDGET AVAILABLE

- Click Open in the dialogue box to open your report in the format you chose (i.e. pdf or Excel)
 - Alternately, you can save the report and open it later by clicking Save => Save As
- For this example, the report opened in our chosen format of pdf
- If you did not choose a format before running the report as detailed on page 5 and 6, the report will automatically open in html (the default) as it did in the previous version of Cognos
 - You will still have a chance to change the format to either pdf or Excel (see next page)

Changing Report Format from HTML Default



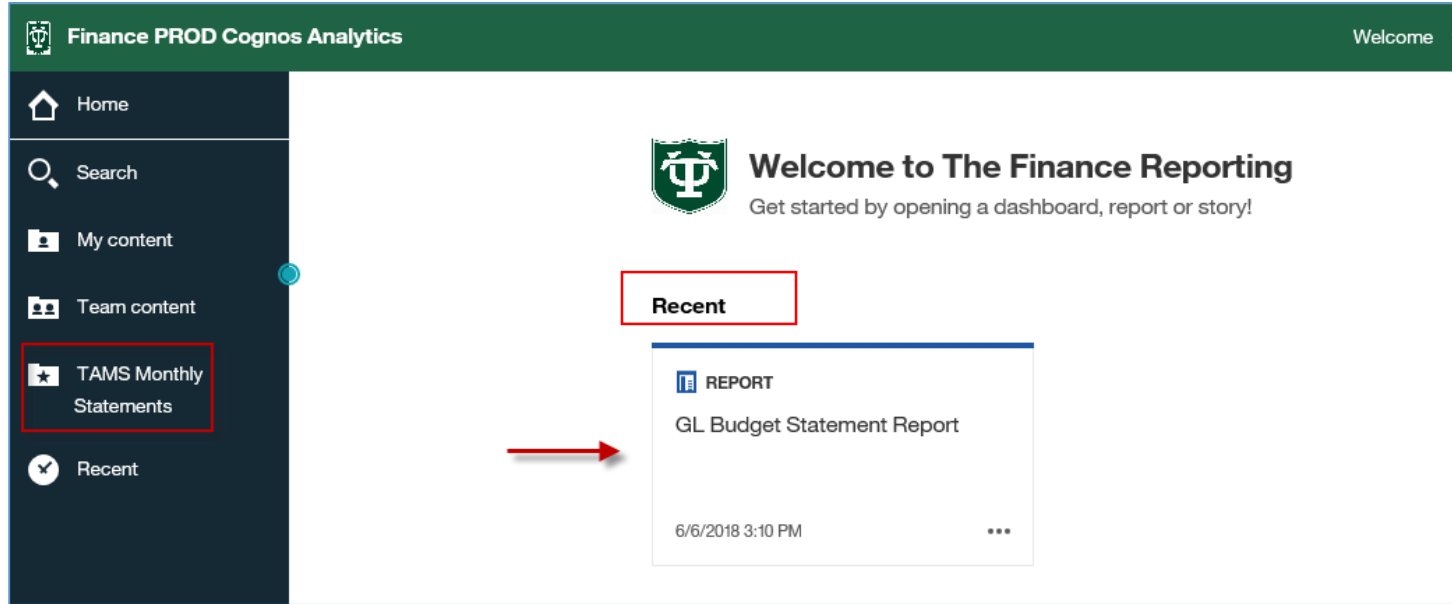
- If you did not choose a report format before running the report (see page 5 and 6), you can change the format of the default html report by clicking the “Play” button (circled triangle) at the top of the report and choosing your preferred format from the list
- **IMPORTANT:** If you are running a spreadsheet version of a report, be sure to choose “Run Excel Data” (not “Run Excel”)

Closing the Report



- When you are ready to close the report and go back to the Homepage to continue running more reports, you can close the current report by clicking the report name at the top of the report, then clicking the close button (“X”) next to the report name in the dropdown menu

Return to Homepage - Recent



- When you return to the Homepage, you will see the last report you ran in the Recent region of the screen
- The report will remain on your Homepage screen allowing you to access it directly from the Homepage instead of drilling down on the TAMS Monthly Statements folder each time you log in