Using the Sponsored Project Report

The Sponsored Project Report (SPR) is found in the University Financials - Reports folder, in the Information Warehouse, under Financial Departmental Reports.

Select SPR001 Sponsored Project Report

You ***must*** select a Fiscal Year and an Accounting Period (month), and enter a project grant number. You can also select how many transactions to include (year-to-date, or month-to-date), and whether to display encumbrances prorated or unprorated.

Using Report Parameters

You can control the data that will appear in the report by entering parameters. Available parameters vary from report to report. Some reports have required parameters, which are indicated by a **red asterisk (*)**.

There are several types of parameter prompts:

- Drop-down lists show the available options when you click the down arrow. You can only select one option from a drop-down list.

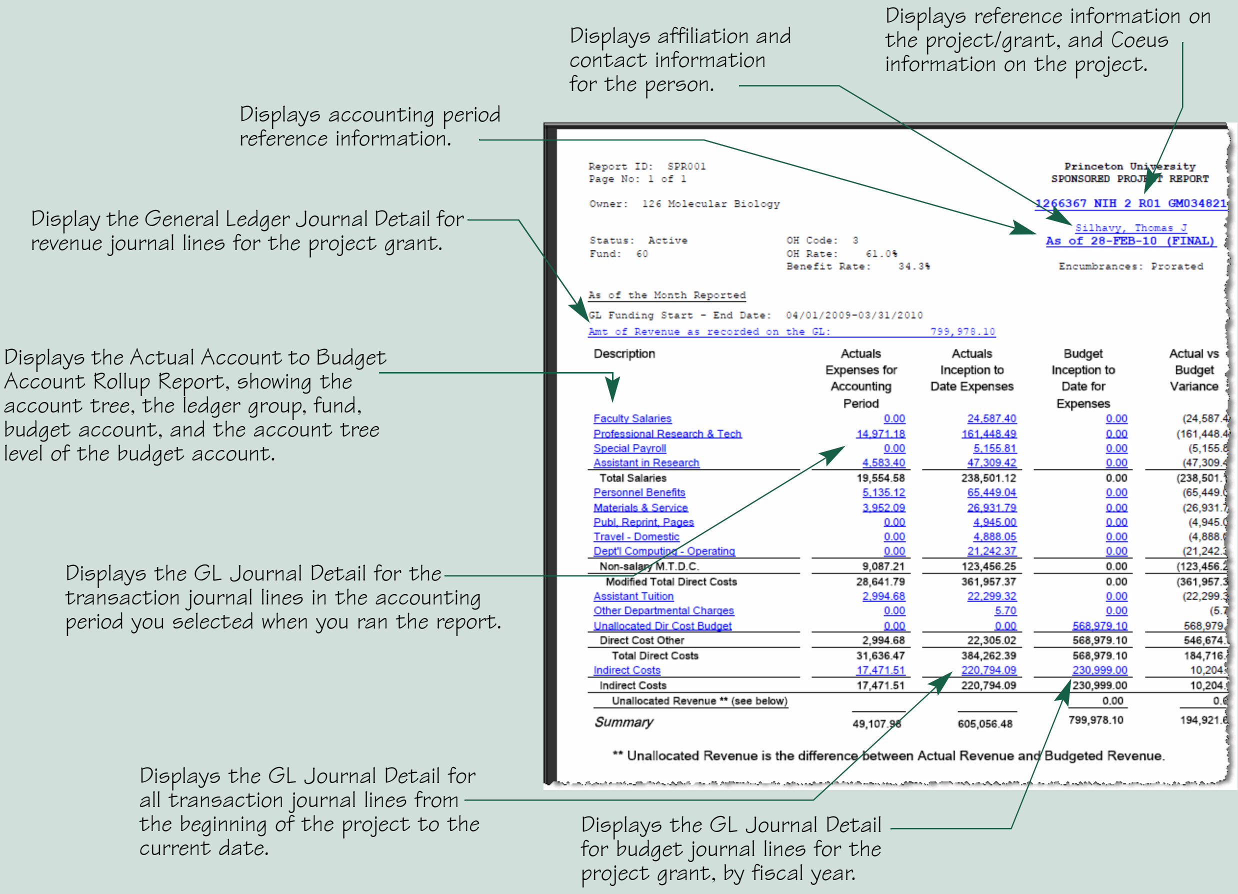
Click to see options

- Option lists show all the available options in a scrollable list, with a checkbox in front of each option. To select an option, click the checkbox. You may select more than one option.

What's on the Sponsored Project Report?

When the report is displayed, you will notice that there are many links, which can be used to generate additional reports showing reference information, summary information, and detailed information (drill-downs). Clicking any of these links opens a new window for the linked report, which stays open until you explicitly close it. ***Important!*** If you close the *original* window (the only one with the Return button on the toolbar header), you are out of the Information Warehouse, and will have to sign in again and rerun the report to get it back.

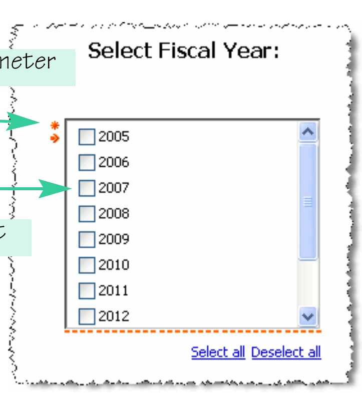
The header provides basic information about the project grant.



Using the Sponsored Project Report

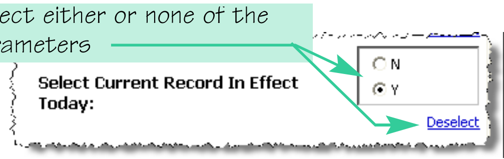
Requiredparameter

Click to select



Another type of Select parameter presents you with radio buttons, which are mutually exlusive. You may select one or the other, or Deselect both to not use the parameter, effectively selecting all.

Select either or none of the parameters

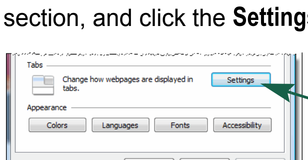


Browser Settings for Tabbed Windows

When you click a drill-down link, the browser opens the report in a new window. You might prefer to open the new report in a new tab on the existing browser window.

To change the browser settings for tabbed windows in Internet Explorer:

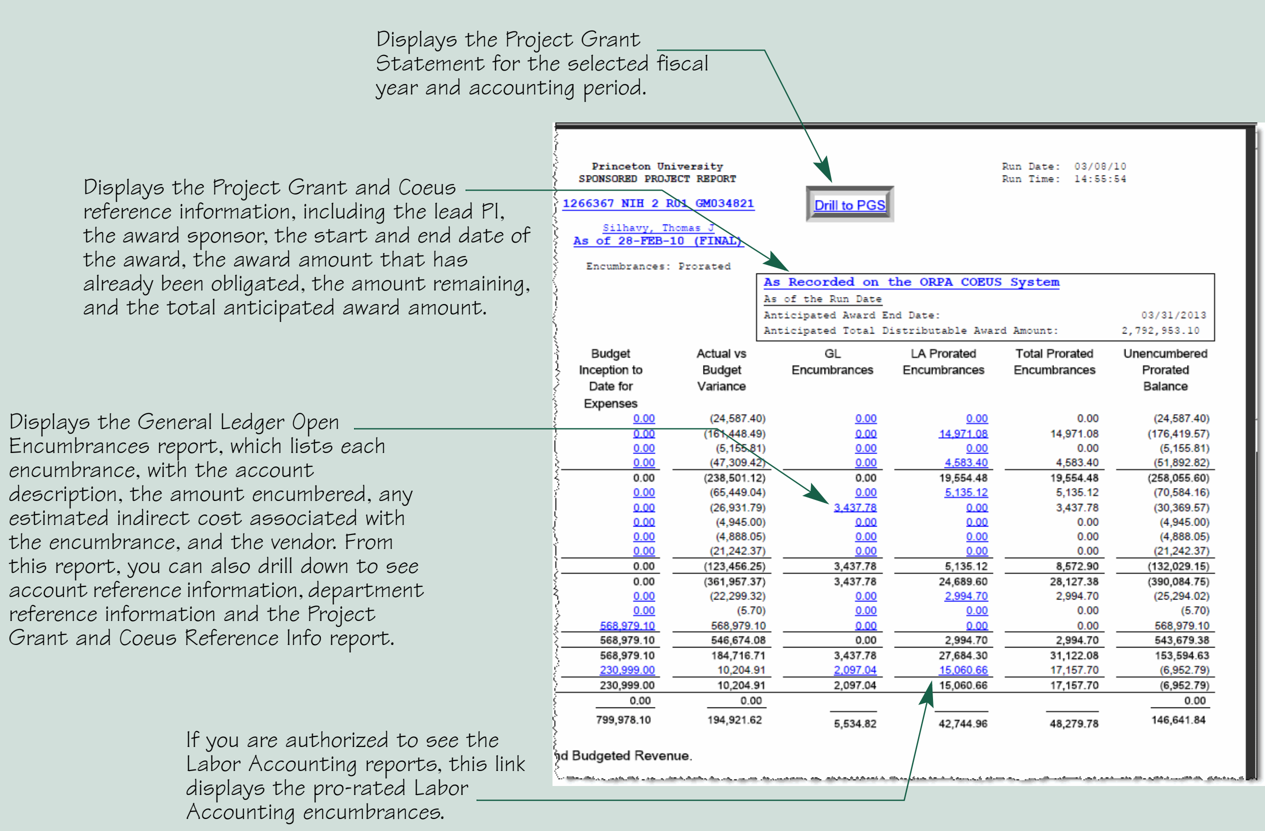
1. Click on **Tools** at the top right of the browser window, and select **Internet Options**.
2. Toward the bottom of the General tab, locate the Tabs section, and click the **Settings** button.



Click to open the Tabbed Browsing Settings window

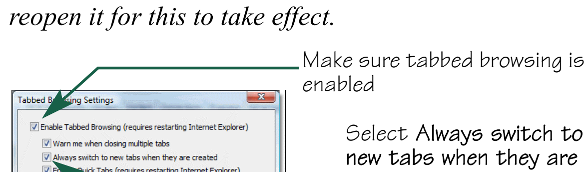
What's on the Sponsored Project Report? (continued)

Past the header with its summaries, you will see actual and budget transactions summarized to the Budget Account.

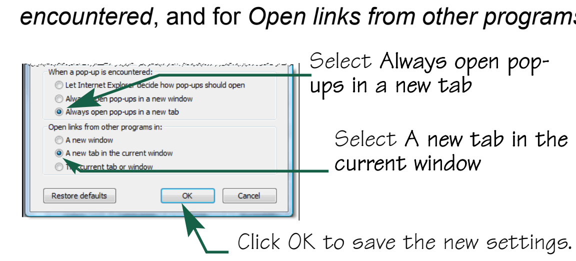


3. On the Tabbed Browsing Settings window, select **Always switch to new tabs when they are created**.

Tip! If this checkbox is dimmed, select Enable Tabbed Browsing. You will have to close the browser and reopen it for this to take effect.



4. Select the **...new tab...** options for *When a pop-up is encountered*, and for *Open links from other programs*.



5. When you have made your settings, click **OK**.

Switching Formats and E-Mailing Reports

Viewing Reports in Different Formats

Some reports are generated directly in Excel format, and you will be prompted to open or save the report. Choose the **Save** option, since opening the report in Excel format does not actually create an Excel spreadsheet.

For reports that are initially displayed in HTML format, you can view the report in a different format.

To view the report in PDF:

1. Run the report, then click on the drop-down arrow next to the View as HTML button on the report toolbar.
2. Click the View in PDF Format menu link.

To view the report in Excel:

1. Run the report, then click on the drop-down arrow next to the View as HTML button on the report toolbar.
2. Click the View in Excel Options menu link.
3. On the Excel options submenu, click the appropriate Excel version:

View in...	If...
Excel 2007 Format	you have Office 2007 on your computer
Excel 2002 Format	you have Office 2002 on your computer. This is the **preferred format** for Financials reports.
Excel 2000 Single Sheet Format	your Financials report has text fields over 156 characters and you need to perform calculations
CSV Format	you need a comma-delimited file. Select this format when you are generating thousands of rows; it is much faster than using any Excel format.

4. When prompted, click the **Save** button, and then select a folder and enter a filename in the Save As dialog box. When the file has been saved, close the empty Cognos Viewer window.
5. You can then open the spreadsheet in Excel by opening Excel, navigating to the location where you saved the file, and opening it.

Note: Before you can perform operations in Excel such as re-sorting, you may need to unmerge cells, unless the report was specifically formatted for Excel.

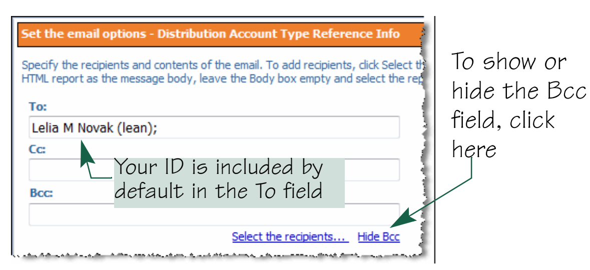
Tip! If you have already opened the report in Excel format, you can copy the cells, open Excel, and paste them into a spreadsheet.

E-mailing a Report

Once you have generated a report, you may send the report by e-mail. However, if you know you want to send the report by e-mail before you run it, you can select additional options.

To email a report that you have already run:

1. On the report page, click the Keep this version drop-down and select Email Report.
2. Type the email addresses, ***separated by semicolons (;)*** in the *To:* or *Cc:* fields. To send blind copies, click the Show Bcc link and enter the address there. For recipients not in the Princeton domain, type the complete address, as in **lean@optonline.net**.



3. If desired, change the *Subject* line.
4. Type the text of the email in the *Body* field.
5. Click the checkbox before *Attach the report* to send the report as an attachment. If you select *Include a link to the report*, when the user clicks on the link in the email, they will be prompted to log into Cognos (if they are not already signed on) before the report will be displayed. The report will contain data that is refreshed nightly.
6. Click **OK** to send the report.

To set email options before running the report:

1. On the report line in the reports folder, click the Run with options button.
2. On the **Run with options** page, select **Send me the report by email**, and then click the advanced options link in the tip on the right.
3. On the **Run with advanced options** page, select the Formats you want to send. You can send the report in as many different formats as you need.
4. Click the checkbox to *Send the report and a link to the report by email*, and then click the Edit the options link.
5. Complete the email options as described in "To email a report that you have already run."
6. When you have entered the email options and clicked OK, you are returned to the **Run with advanced options** page. Click the Run button to run the report and send the e-mail.
7. If the report has parameters, you will be prompted to select the desired parameters. You will then need to verify the report selection by clicking OK. When the report has been run, you are returned to the reports folder.

Need help?

Documentation is available at www.princeton.edu/userdocs.

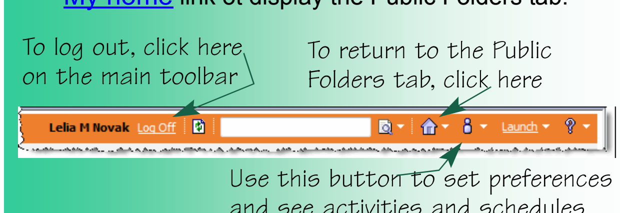
To speak with a Help Desk specialist, call 258-HELP and choose option 3. You may also submit questions to the Help Desk at asahelp@princeton.edu.

Financials Departmental Reports — SPR

Logging On

To log onto the Information Warehouse

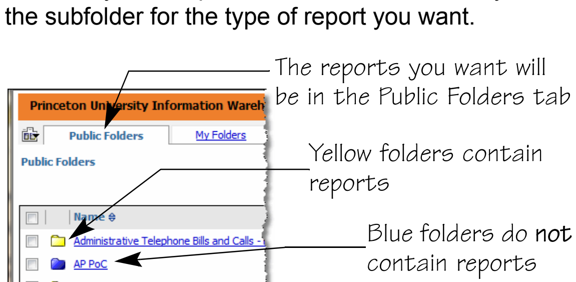
1. Start your browser and enter the following URL in the address bar: **www.princeton.edu/iw**.
2. Click on **Enter the Information Warehouse (IW)**.
3. Enter your LDAP user ID and password.
4. If the Cognos 8 Welcome page is displayed, click on the My home link ot display the Public Folders tab.



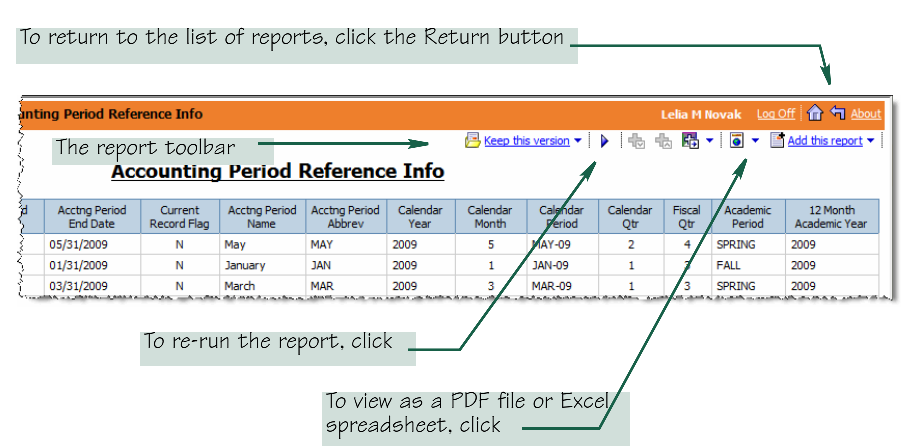
Running Existing Reports

The reports you are authorized to view are located in the Public Folders in the Information Warehouse, grouped in folders by application. Report packages are indicated by a yellow folder. Blue folders are for package owners, and do not contain reports for viewing.

1. Log into the Information Warehouse as described above.
2. In the Public Folders tab, click on the package name next to a yellow reports folder and, if necessary, select the subfolder for the type of report you want.



3. Click the name of the report you want to run.
4. Select the parameters that will give you the information you want. Asterisks indicate required parameters.
5. Click the **Finish, Run, Run Report,** or **Submit** button at the bottom of the page to run the report.
6. Use the Page down link at the bottom of the page to go forward from page to page.
7. If you want to save the data in the report, see "Viewing Reports in Different Formats", below, for instructions.
8. To re-run the report, click the Run button. The parameters from the current report are saved, so you must remember to deselect them if you want to use different parameters.



9. Use the **Return** button on the header banner to return to the list of reports.

What's in the Financials Departmental Reports Folder?

The Departmental Reports folder includes several familiar reports and three new folders. The three folders each include two summary reports of General Ledger journal data, one aggregated by account, project/grant, fiscal year, and accounting period; and the other aggregated by project/grant, fiscal year, and accounting period. These reports are formatted for Excel and are useful for pivot table analysis.

- Inception to Date Activity Summary is useful for capital reports and sponsored projects.
- Month to Date Activity Summary includes the data for the selected month to date.
- Year to Date Activity Summary includes the data for the entire year to date.
- DSR001 and DSR003 are summary reports by fiscal year. In addition to the summary information, they include drill-down links to the year-to-date PGS and the month-to-date PGS.
- PGS001 and Batch PGS001 are Project Grant Statement reports. These reports include multiple drill-downs for reference information, summary information, and detail informations. See inside for more information.
- SPR001 is the Sponsored Project Report.