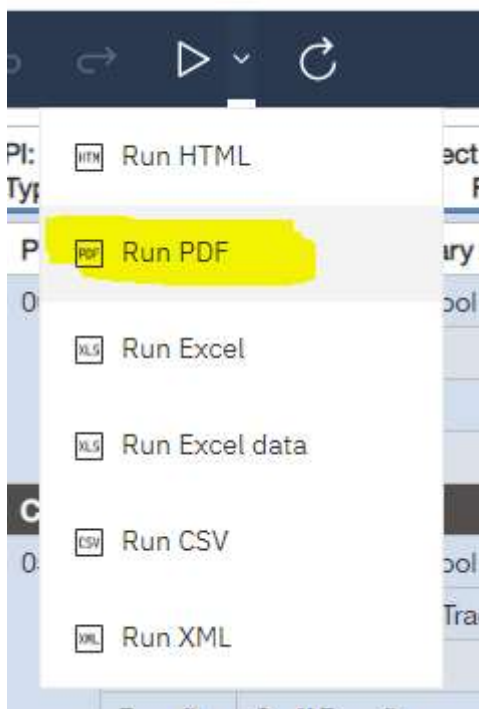


Running a PDF from the report. (A PDF cannot be created from the monthly report sent directly to the PIs)

1. Select a PI Grant and Contract Report

	PI Grant and Contract Report - Pick Dates	1/19/2022 12:51 PM
	PI Grant and Contract Report - Prior Month	1/21/2022 1:30 PM
	PI Grant and Contract Report for Depts - with Link	3/4/2022 8:57 AM


2. Select the prompts needed to run the report (See Prompt Instructions for how to set up prompts for particular reports)
3. After a report is run, select the dropdown arrow next play button (triangle) to run as pdf



4. A PDF will pop up and can be printed or downloaded.

Emailing a PDF from Cognos

1. When hovering over a report, an ellipsis will pop up to the right.



A screenshot of a Cognos report list. The first report, 'PI Grant and Contract Report - Pick Dates', is highlighted with a yellow box. To its right, a yellow ellipsis menu is visible. Below it are two other reports: 'PI Grant and Contract Report - Prior Month' and 'PI Grant and Contract Report for Depts - with Link'.

Report Name	Run Date
PI Grant and Contract Report - Pick Dates	1/19/2022 12:51 PM
PI Grant and Contract Report - Prior Month	1/21/2022 1:30 PM
PI Grant and Contract Report for Depts - with Link	3/4/2022 8:57 AM

2. Click Run in Background

Run as

☒ Run in background

☐ Now

☐ Later

☒ Prompt me

You will be prompted for input before the report runs.

3. Choose PDF as the format



A screenshot of the Cognos 'Format' section. The 'PDF' option is selected and highlighted with a yellow box. Other options include HTML, Excel Data, CSV, Excel, and XML. Below the format options is the 'Accessibility' section with an option to 'Enable accessibility support'.

Format

☐ HTML ☒ PDF ☐ Excel

☐ Excel Data ☐ CSV ☐ XML

Accessibility

☐ Enable accessibility support

4. Choose send report by email and click edit details

Delivery

☒ Save

☒ Save report

☐ Save as a report view

☐ Save report as an external file

☒ Send report by email

[Edit details](#)

No recipients

5. Enter the email addresses the report link needs to be sent in the 'To' field, Update the Subject Line if necessary, and add whatever you would like the email to say in the Message field, and select "Attach Report Output"

←

Send report by email

To

lockhartc@umsystem.edu X

Cc | Bcc

Directory

Subject

A new version of PI Compliance Report for Depts - with Link is available

Message

Dr.

Below is a link to your outstanding PI Compliance Report for March 2021 Expenses

✂

📄

📧

📧

↶

↷

ABC

🔗

🔗

🖼

📊

☰

Ω

🔄

B

I

U

~~S~~

x_2

x^2

I_x

$\frac{1}{2}$

$\frac{3}{2}$

$\frac{1}{2}$

$\frac{1}{2}$

$\frac{1}{2}$

$\frac{1}{2}$

”

Styles

Normal

body p

Include the following with my message

☐ Include link

☒ Attach report output

6. Click RUN at the very bottom



7. Select the prompts needed to run the report and run the report (See Prompt Instructions for how to set up prompts for particular reports)