CPC Reports User Guide

*Last updated 6/14/2018

Both BOE and Cognos reports can be run from CPC Reports portal which provides a quick, intuitive interface for both platforms. Some of the features of CPC Reports include:

- Autocomplete for key report fields like PEID, Org Key, and Ledger
- Re-run a report using the last prompt values
- Easily create favorites for fast access to the reports you use the most
- Choose from multiple report formats: HTML, PDF, Excel or CSV

Eventually all BOE reports will be replaced with a Cognos version. In the meantime, CPC Reports allows you to easily switch between the new Cognos reports and the existing BOE reports. You can add both types to your favorites so easily run a mix of the two and take advantage of the new Cognos reports.
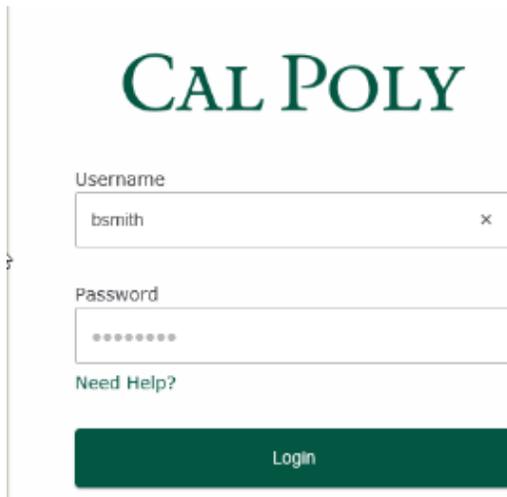
> You will only have access to the combined CPC Reports interface if you have a Cognos account.

Running Reports

> For the best experience, use Internet Explorer when using CPC Reports.

Log onto CPC Reports at https://cpcreports.calpoly.edu/

- ***Use your Cal Poly username and password*** (the same one you use to log into the campus portal)
  - This will be your email alias - the portion before the @calpoly.edu

Once logged in, you'll see the following screen.

1. Favorites Tab
   a. Reports you've starred will be on this tab
2. Recent Reports Tab
   a. This is the tab you will start on. If you haven't run any reports through CPC Reports yet, this tab will initially be empty, but it will populate as you start running reports.
3. BOE/InfoView Tab
   a. This is where you will find all the current BOE reports
4. Cognos Tab
   a. All the newly developed Cognos reports will be found here
5. System Label
   a. This label will indicate if the recently run report was a Cognos or BOE report
6. Report name
   a. The name of the report, regardless if it's Cognos or BOE
   b. Hovering over this section will expand it and show additional parameters that were used.
7. Parameters
   a. The last parameters you used when running this report
   b. Hover your cursor over this area and the list will expand if there are more than two parameters
8. When?
   a. Indicates the last time you ran this report
9. Re-run
   a. Clicking this button will bring up the interface to run the report with the last parameters that were used
10. Cognos (Test)
    a. Reports here are in the Cognos Test environment and point to ONESolution TEST. Not all reports in the Cognos folder will be found here.

Depending on your security, you may not see all available tabs.

Report Running Options

Whether it's BOE or Cognos, navigate to the report you wish to run and either click the name of the report or click the "Rerun" button.
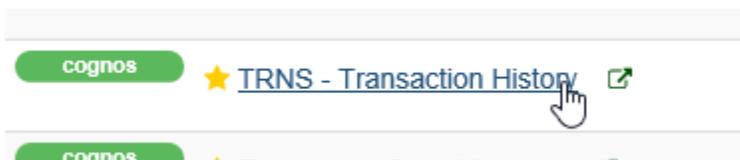
Once you do this the parameter page will appear and you'll be presented with a few options

Parameters

Many of the parameters are "smart," meaning, they will autocomplete as you type. Frequently, these prompts will be cascading, from the top down. For example:

- Choose Ledger FD, and all the keys in an Org Key prompt will be FD Keys
- Choose a PEID, and all invoices shown in an Invoice prompt will be for that PEID

Here's an example of a Fiscal Period prompt.

- If there is a value present, clicking on the "X" will clear the prompt
- Click on the drop down to see a list of values
- For long lists, simply start typing the value you want and the list will autocomplete the correct value for you

Parameters are either "Required" or "Optional." You must complete all required parameters.

- In Cognos - the Required & Optional parameters are separated, with the required prompts on top.
    - You can *completely ignore* the optional prompts if you want & leave them blank.
    - Any optional prompts that are populated will filter the report
- In BOE - all parameters are required and you must populate them all

Cognos Report Output Options

When you have completed the prompts, you'll need to choose a report output format.

- View Report
    - The fastest option, but cannot be printed. Best for viewing data on screen and taking advantage of some of the advanced Cognos features
    - You will still have the option to export the report to PDF for printing even if you run it this way
    - Drill through only works from this option - it does not work when you choose "Run as PDF"
- Run as PDF
    - Use this option if you know you want to print a report before you run it.
- Run as Excel
    - Outputs the report in Excel. How well the report exports will vary, depending on report layout
- Run as CSV
    - Export report data in CSV format

When you have populated the prompts, click on the output format you want & the report will run.

Once you've run the report, it will open in a new tab. You can always bounce back to the prompt page you ran the report from and run it again with different values. When you do, it will open in a new tab and keep your original output in place.

Cognos Re-Prompt Functionality

Some Cognos reports include a re-prompt function. This allows you to quickly change a few parameters after you've run the report & quickly re-generate data without leaving the report

> The Reprompt feature only works when you run the report by choosing "View Report"

Fiscal Year: * 2016	**Org Key:** * 44570 **To** * 44570		**Key Status:** All	**Functions:** All	**Departments:** All
Period: * 01 **To** * 12	**Object Codes:** * 860003 **To** * 860003		**Funds:** All	**Division:** All	

Reprompt

The Transaction (TRNS) report includes the re-prompt functionality. To use the feature:

- Change any of the parameter values that are marked with an asterisks
- Click the "Reprompt" button to re-run the report with the new parameters.

Printing Cognos Reports

Depending what report output option you chose, there a few different ways to print reports.
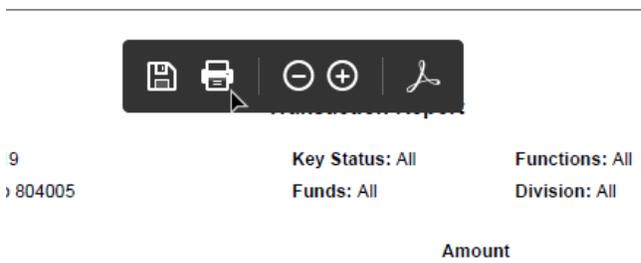
> You CANNOT print from the Internet Explorer print icon. You'll just get an empty page. See the examples below on how to print a Cognos Report

If you chose "View Report"

- Choose "View in PDF"
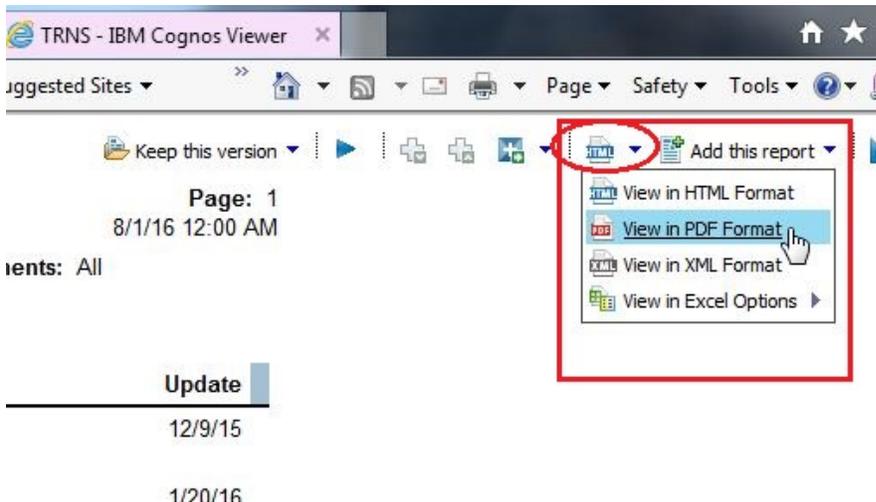
- Once the report opens in Adobe Acrobat, when you hover your mouse anywhere over the report, the following menu bar should appear

- Then, choose either the printer icon to print, or the floppy disc icon to save

If you chose "Run as PDF"

- Once the report opens in Adobe Acrobat, when you hover your mouse anywhere over the report, the following menu bar should appear


Key Status: All   **Functions:** All
Funds: All   **Division:** All

Amount
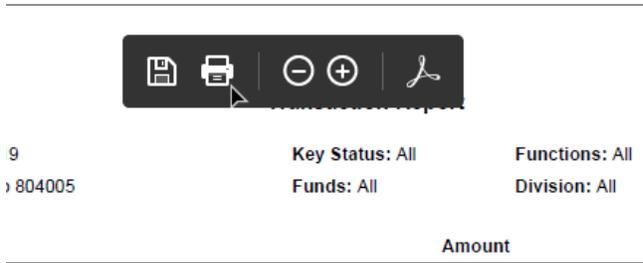
- Then, choose either the printer icon to print, or the floppy disc icon to save

Printing BOE Reports

Depending on which browser you use and your ability to install browser plugins on your computer, printing from BOE is easiest by choosing the Run as PDF option to begin with

If you chose "Run as PDF" (recommended method)

- After you run the report & the PDF is generated, use the Acrobat print function to print the report. Depending on your browser and the version of Acrobat, this may vary
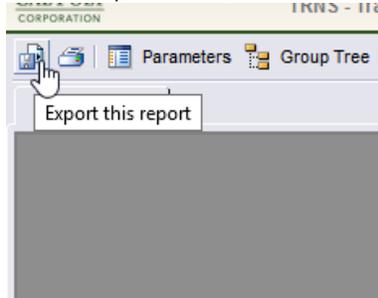- You may see the print icon in the top right hand corner:
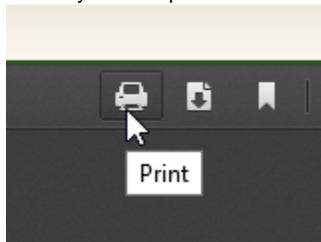
- Or, it may become visible simply by hovering your cursor over the report
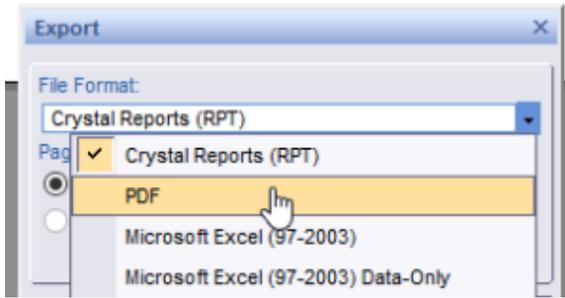

Key Status: All   **Functions:** All
Funds: All   **Division:** All

Amount
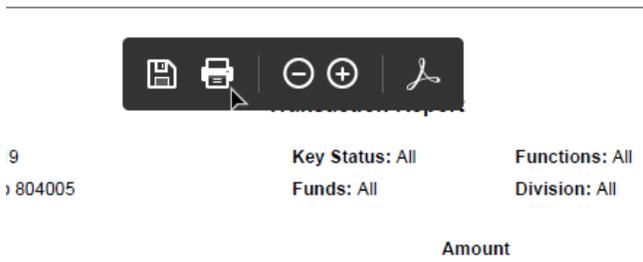
- Then, choose either the printer icon to print, or the floppy disc icon to save

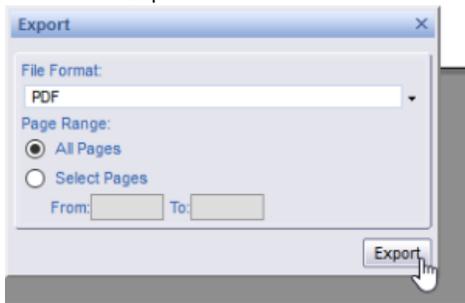## If you chose "View Report"

- Once the report has run, choose the "Export Report" option in the top left corner

- Choose PDF as the output format

- Click on the "Export" button

- From here you can choose to save or open the report in PDF
- Once you've generated the PDF, you can then print it.

Creating Favorites

You can add commonly used reports to the "Favorites" tab very easily. Simple click on the star next to a report's name. Once the start is solid yellow - that means it will appear on the Favorites tab.
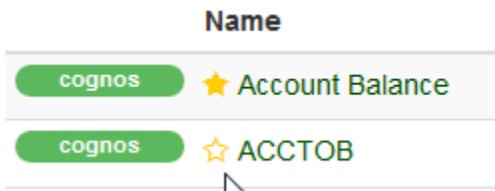
On the Favorites tab, click a star again so it's no longer solid yellow, & it will disappear from favorites when you leave or refresh the page. You can also add entire folders as favorites using the same method.