

Accessing Cognos Reports from Within KFS

1. Type www.usc.edu/kuali in the address field of your browser.
2. When the "Kuali at USC" page is displayed, click the Kuali Login button. The "USCnet Login" page will be displayed.
3. Log in, using the USC NetID user name and password. If you do not know your USC NetID or password, please contact USC Kuali Customer Support at 213-740-5857 or at kuali@usc.edu
4. In the upper right-hand area of the screen, click the **Business Intelligence** button.

The Financial Main Menu page of the Kuali screen will be displayed (see following example).

The screenshot shows the USC Kuali Financial Main Menu page. The top navigation bar includes the USC University of Southern California logo and several menu tabs: Financial Main Menu, Workflow Main Menu, Financial Maintenance, Workflow Maintenance, and Administration. A 'Business Intelligence' button is highlighted with a red arrow. Below the header, there is a 'Message Of The Day' section with a message for Kuali users. The main content area is divided into three columns: Transactions, Custom Document Searches, and Balance Inquiries. The Transactions column lists various financial processes like Accounts Receivable, Budget Construction, and Financial Processing. The Custom Document Searches column lists categories like Financial Transactions, Accounts Receivable, Capital Asset Management, Contracts & Grants, Effort Certification, Financial Processing, and Purchasing/Accounts Payable. The Balance Inquiries column lists categories like General Ledger, Labor Distribution, and Endowment.

The IBM Cognos welcome page shown in the following example will be displayed in a new window or new tab.

The screenshot shows the IBM Cognos Viewer - EDW Portal welcome page. The page title is "Welcome to the Business Intelligence Portal for KFS - General Ledger". The page features a table with three columns: Financial Reports, FDL Reports, and LookUp Reports. The Financial Reports column lists reports like Account Status Report (ASR), ASR with Object Type Sub Totals, ASR for Download, ASR with Object Type Sub Totals for Download, Analysis R, Account Totals by Object Class, Ledger Transaction Inquiry, and Transaction Detail Report. The FDL Reports column lists reports like BA.Extract.Acct.P, BA.Extract.Chart.P, BA.Extract.Detail.P Part 1, BA.Extract.Detail.P Part 2, BA.Extract.PD.P, BA.Extract.Sum.P, BA.Program.Access.P, and BA.Rollup.P. The LookUp Reports column lists reports like Chart of Accounts, Object Code Inquiry, Organization Inquiry, and Check/Electronic Payment Number Look-Up Report.

Note that if you try to access Cognos directly by using a link or a browser bookmark rather than the **Business Intelligence** button within Kuali, the "USCnet Login" page will be displayed, requiring you to enter your USC NetID user name and password.

How to Run the Chart of Accounts Report

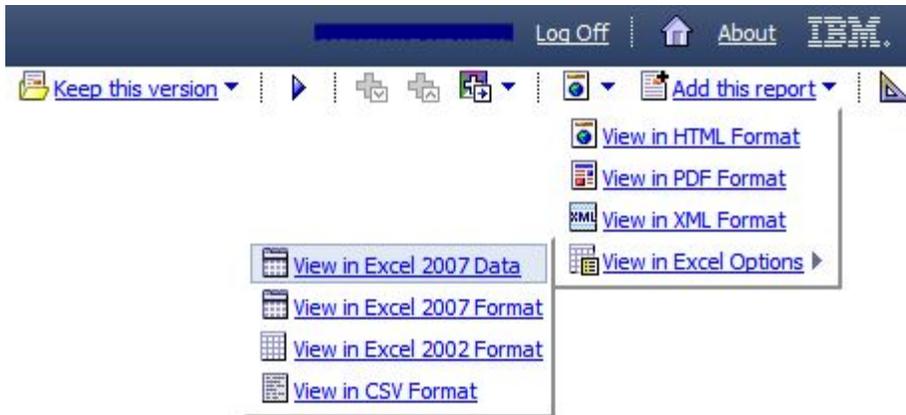
1. In the IBM Cognos welcome page, under "LookUp Reports" box, click on the "Chart of Accounts".

The screenshot shows the IBM Cognos Business Intelligence Portal for KFS - General Ledger. The page has a header with the USC University of Southern California logo and the text "Welcome to the Business Intelligence Portal for KFS - General Ledger". Below the header, there are three main sections: Financial Reports, FDL Reports, and LookUp Reports. Under the LookUp Reports section, the "Chart of Accounts" link is highlighted in yellow. Other links in the LookUp Reports section include "Object Code Inquiry", "Organization Inquiry", and "Check/Electronic Payment Number Look-Up Report".

2. Search by Organization Code. Type the 5 digit org code, then click "Search". The 10-digit org codes will populate in the "Results" box, then click "Select all". You will need to click "Insert" to the "Choice" box, then click "Select all". At the bottom of the page, click the "Finish" button.

The screenshot shows the "Parameter Selection Page" for the "Chart of Accounts Report". The page prompts the user to search by either Organization Code or Account Number. The search criteria is set to "Search by Organization Code". The search results show a list of 10-digit organization codes, and the "Select all" button is highlighted. The "Choice" box is empty, and the "Insert" button is highlighted. The page also shows options for "Show Accounts Created (Optional)", "Accounts Status: (optional)", "Show Accounts Expiring (Optional)", and "Hide Column(s) (Optional)".

3. Save the report via Excel 2007 Format.



Below is the spreadsheet report sample:

Org Code	Acct Nbr	Acct Name	Sub Fund Group Code	Higher Ed Code	Fiscal Officer	Fiscal Officer USC ID	Supervisor Name	Supervisor USC ID	Manager Name	Manager USC ID	USC Acct Status Code	Acct Create Date	Acct Eff Date	Acct Exp Date
2031500000	8914010305	SMETZ UNITRUST HELEN D.	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	07/01/1991	07/01/1991	
2031500000	8914010427	ROTHROCK UNITRUST LAWRENCE & PHYLLIS	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	09/09/1999	09/09/1999	
2031500000	8914010471	LAZAR UNITRUST JEAN & DAVID	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	10/23/2003	10/23/2003	
2031500000	8914016222	WICKS GIFT ANNUITY KESSLER & VIRGINIA	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	06/26/1996	06/26/1996	
2031500000	8914016294	FULLER GIFT ANNUITY BLANCHE	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	10/24/1997	10/24/1997	
2031500000	8914016296	SPALDING GIFT ANNUITY ANTHONY & HELEN	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	12/04/1997	12/04/1997	
2031500000	8914016313	LAZAR GIFT ANNUITY #2 DAVID & JEAN	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	02/24/1998	02/24/1998	
2031500000	8914016317	HOPKINS GIFT ANNUITY ROBERT & LOUISE	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	03/03/1998	03/03/1998	
2031500000	8914016321	CONTRERAS GIFT ANNUITY JOSEPH	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	01/29/1998	01/29/1998	
2031500000	8914016333	PAULL GIFT ANNUITY MARGARET	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	06/11/1998	06/11/1998	
2031500000	8914016339	WILBUR GIFT ANNUITY LESLIE	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	07/06/1998	07/06/1998	
2031500000	8914016358	ALLEN GIFT ANNUITY #4 CLIFFORD & BETTY	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	10/03/2000	10/03/2000	
2031500000	8914016367	QUINLEY GIFT ANNUITY SALLY & JOHN	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	12/02/1998	12/02/1998	
2031500000	8914016495	ALLEN GIFT ANNUITY #5 CLIFFORD & BETTY	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	01/17/2001	01/17/2001	
2031500000	8914016516	ALLEN GIFT ANNUITY #6 CLIFFORD & BETTY	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	09/19/2001	09/19/2001	
2031500000	8914016524	ALLEN GIFT ANNUITY #7 CLIFFORD & BETTY	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	01/15/2002	01/15/2002	
2031500000	8914016544	RINGWALD GIFT ANNUITY SIEGFRIED	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	06/27/2002	06/27/2002	
2031500000	8914016569	WESTCOTT GIFT ANNUITY #1 DORIS	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	06/18/2003	06/18/2003	
2031500000	8914016571	WESTCOTT GIFT ANNUITY #2 DORIS	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	06/27/2003	06/27/2003	
2031500000	8914016585	PULLIAS GIFT ANNUITY CALVIN	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	11/07/2003	11/07/2003	
2031500000	8914016588	ALLEN GIFT ANNUITY #8 CLIFFORD & BETTY	AFB	0000	Foster, Dennis	6418506581	Supervisor, Account	10000000027	Sunga, Merle	1376076218	A	12/23/2003	12/23/2003	