All Funds Balance Report (AFBR): Cognos – Direct Access Login and Report Functionality

1. Open Cognos Production from Trailhead button or go to: https://cognos.mines.edu/ibmcognos/cgi-bin/cognos.cgi and login with your Trailhead credentials. [note: when using an off-campus network, VPN connection is required to run Cognos; preferred methods include secure.mines.edu or OpenVPN.]

2. Locate the AFBR by following this folder path: Public Folders > Finance > General Campus > Controller Campus > AFBR

3. Run report by clicking the “play” sign next to the report titled “AFBR-level-1-summary”

4. Leave all default selections and click ‘Run’

5. Select a name from list of values (pulldown) and click ‘Finish.’ HINT: You can type the first few letters of last name to find pulldown proximity.
6. The All Funds Balance Report will run and data will populate for all funds for which a user is listed as either a PI, Co-PI (Grants) or Fund Financial Manager.

7. Clicking on the hyperlinked Fund number will drill down into a Fund Balance Summary.

8. To return to the main page, or run the report for a new user, use the ‘Return to Summary’ hyperlink at bottom right of page or use your browser back button. [note: too much back and forward navigation using browser may result in returning to a previously tested and cached username]

9. From the main page, select the blue arrow at top right of the window to select a new user and run the report again.

10. Other Report Functions:
    a. Export to PDF and Excel – Clicking either of these options at top right of the report window will open up a new browser window and export the information into either format. [note: some browsers will require you to first disable Pop-Up blocking.]

    b. Multiple pages – if data exceeds the length of the page, Cognos Page Up and Page Down functionality will appear at bottom left of the report window. Use these functions to navigate between pages.

11. For general help with the report, please see the All Funds Balance Report FAQ page. For help with Sponsored Research funds, contact ora@mines.edu. For help with all other funds, contact the Controller's Office at CO-Accounting@mines.edu.