

Cognos Performance Report



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Key Objectives



- **Why use Cognos for Reporting?**
- **Accessing Cognos**
- **Running YTD Budget vs Actual Reports**
- **Running Quarterly Performance Report**
- **Running Monthly Performance Report**
- **Exporting Reports**
- **E-mailing Reports**
- **Analyzing Reports**

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Why Use Cognos Reports?

1. Create Consolidated Reports:
 - a. Orgs
 - b. Funds
2. Budget vs Actual:
 - a. With Encumbrances
 - b. Without Encumbrances
3. Year-Over-Year Trends:
 - a. Quarterly
 - b. Monthly
 - c. Revenues
 - d. Expenses
4. Provide Formatted Reports:
 - a. PDF
 - b. Excel
 - c. Email Reports

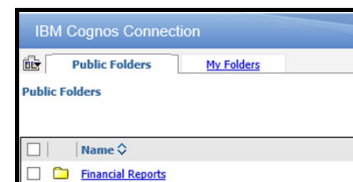


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Accessing Cognos Report Menu

Go to: <http://demeter.westernu.edu/cognos10>

Enter: *Banner ID* and *Password*



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YTD Budget Vs Actual Performance Analysis (without Encumbrances)

 [YTD Budget Vs Actual Performance Analysis](#)

Select *YTD Budget vs Actual Performance Analysis*

Select Desired Parameters (Steps 1-6) and Click *Finished*

YTD Budget Vs Actual Performance Analysis (Parameters and Options)

Parameters

Fiscal Year: ☐ 2021 ☒ 2020 ☐ 2019 ☐ 2018 ☐ 2017 ☐ 2016

Fiscal Period: ☐ Auto ☒ 01 ☐ 02 ☐ 03

Unit: ☐ Consolidated ☐ Advancement ☒ Revenues ☐ CTR & JPR ☐ Center for Disability and Health Policy ☐ Center for Innovation ☐ College of Dental Medicine ☐ College of Health Sciences

Organization: ☒ 5801 - Revenues Director ☐ 5805 - Revenues Oregon ☐ 5807 - Revenues Oregon

Fund: ☒ 1100 - Current Unrestricted ☐ 1101 - Current Unrestricted ☐ 1102 - Current Unrestricted

Display Options

Include: ☒ Yes ☐ No

Parameter Page: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6

Cancel

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YTD Budget Vs Actual Performance Analysis

	Adjusted Budget (FY 2021)	Adjusted Budget (07/01/20 - 06/30/20)	Actual (07/01/20 - 06/30/20)	Budget vs. Actual Variance (\$)	Variance (%)
Revenues					
Equipment Fees					
Student Fees					
Student Tuition					
Tuition & Fee Revenues					
Advancement Revenues					
Auxiliary Revenues					
Grants and Contracts					
Net Patient Care Services Revenues					
Other Revenues					
Revenues					
Expenses					
Exempt Administrative					
Faculty					
Non-Exempt Administrative					
Other Compensation					
Salaries and Wages					
Fringe Benefits					
Compensation Expenses					

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YTD Budget Vs Actual Performance Analysis (with Encumbrances)

 [YTD Budget Vs Actual Performance Analysis \(Encumbrance\)](#)

Select *YTD Budget vs Actual Performance Analysis (Encumbrances)*

Select Desired Parameters (Steps 1-6) and Click *Finished*

YTD Budget Vs Actual Performance Analysis (Parameters and Options)

Parameters

Fiscal Year: ☐ 2021 ☒ 2020 ☐ 2019 ☐ 2018 ☐ 2017 ☐ 2016

Fiscal Period: ☐ Auto ☒ 01 ☐ 02 ☐ 03

Unit: ☐ Consolidated ☐ Advancement ☒ Revenues ☐ CTR & JPR ☐ Center for Disability and Health Policy ☐ Center for Innovation ☐ College of Dental Medicine ☐ College of Health Sciences

Organization: ☒ 5801 - Revenues Director ☐ 5805 - Revenues Oregon ☐ 5807 - Revenues Oregon

Fund: ☒ 1100 - Current Unrestricted ☐ 1101 - Current Unrestricted ☐ 1102 - Current Unrestricted

Display Options

Include: ☒ Yes ☐ No

Parameter Page: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6

Cancel

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YTD Budget Vs Actual Performance Analysis (Encumbrance)

	Adjusted Budget (FY 2020)	YTD	Encumbrance	Total Actual	Budget vs. Actual Variance (\$)	Variance (%)
Revenues						
Equipment Fees						
Student Fees						
Student Tuition						
Tuition & Fee Revenues						
Advancement Revenues						
Auxiliary Revenues						
Grants and Contracts						
Net Patient Care Services Revenues						
Other Revenues						
Revenues						
Expenses						
Exempt Administrative						
Faculty						
Non-Exempt Administrative						
Other Compensation						
Salaries and Wages						
Fringe Benefits						
Compensation Expenses						

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YTD Quarterly Performance Analysis

☐ ☒ YTD Quarterly Performance Analysis

Select *YTD Quarterly Performance Analysis*

Select Desired Parameters (Steps 1-5) and Click *Finished*

YTD Quarterly Performance Analysis (Parameters and Options)

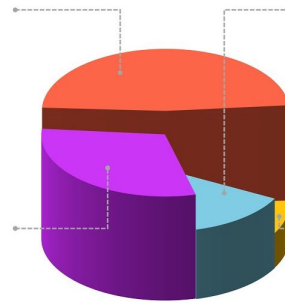
Parameters		Display Options
Fiscal Year: <ul style="list-style-type: none"> <input type="radio"/> 2025 <input checked="" type="radio"/> 2020 <input type="radio"/> 2019 <input type="radio"/> 2018 <input type="radio"/> 2017 <input type="radio"/> 2016 	Include: <input checked="" type="radio"/> Yes <input type="radio"/> No Parameter Page: <input type="radio"/> Yes <input checked="" type="radio"/> No	1
Unit: <ul style="list-style-type: none"> <input type="radio"/> Consolidated <input type="radio"/> Advancement <input checked="" type="radio"/> Academic <input type="radio"/> CTSU & IPE <input type="radio"/> Center for Disability and Health <input type="radio"/> Center for Innovation <input type="radio"/> College of Dental Medicine <input type="radio"/> College of Health Sciences 		2
Organization: <ul style="list-style-type: none"> <input checked="" type="radio"/> S805 - Bookstore Director <input type="radio"/> S805 - Bookstore Oregon 		3
Fund: <ul style="list-style-type: none"> <input checked="" type="radio"/> S100 - Current Unrestricted 		4
<input type="button" value="Cancel"/> <input type="button" value="Back"/> <input type="button" value="Next"/> <input type="button" value="Finish"/>		6

\$8.3 MILLION
QUARTER 1

\$5.3 MILLION
QUARTER 2

\$2.3 MILLION
QUARTER 3

\$1.5 MILLION
QUARTER 4



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YTD Quarterly Performance Analysis Report

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YTD Quarterly Performance Analysis																
	Jul-Sep FY2020	Jul-Sep FY2021	Change (\$)	Change %	Jul-Dec FY2020	Jul-Dec FY2021	Change (\$)	Change %	Jul-Mar FY2020	Jul-Mar FY2021	Change (\$)	Change %	Jul-Jun FY2020	Jul-Jun FY2021	Change (\$)	Change %
Revenues																
Equipment Fees																
Student Fees																
Student Tuition																
Tuition & Fee Revenues																
Advancement Revenues																
Auxiliary Revenues																
Grants and Contracts																
Net Patient Care Services Revenues																
Other Revenues																
Revenues																
Expenses																
Exempt Administrative																
Faculty																
Non-Exempt Administrative																
Other Compensation																
Salaries and Wages																
Fringe Benefits																
Compensation Expenses																

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Monthly Performance Analysis

[Monthly Performance Analysis](#)

Select *YTD Monthly Performance Analysis*

Select Desired Parameters (Steps 1-5) and Click *Finished*

Monthly Performance Analysis (Parameters and Options)

Parameters

Fiscal Year: ☐ 2021 ☒ 2020 ☐ 2019 ☐ 2018 ☐ 2017 ☐ 2016

Unit: ☐ Consolidated ☐ Advancement ☒ Bookstore ☐ CCTL & SPE ☐ Center for Disability and Health Policy ☐ Center for Innovation ☐ College of Dental Medicine ☐ College of Graduate Studies

Organization: ☒ 5841 - Bookstore Director ☐ 5865 - Bookstore Organ

Fund: ☒ 1100 - Current Unrestricted

Display Options

Include: ☒ Yes ☐ No

Parameter Page:

Buttons: Cancel Back Next **Finish**



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Monthly Performance Analysis Report

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Monthly Performance Analysis

	Jul FY2019	Jul FY2020	Change (\$)	Change (%)	Aug FY2019	Aug FY2020	Change (\$)	Change (%)	Sep FY2019	Sep FY2020	Change (\$)	Change (%)
Revenues												
Equipment Fees												
Student Fees												
Student Tuition												
Tuition & Fee Revenues												
Advancement Revenues												
Auxiliary Revenues												
Net Patient Care Services Revenues												
Other Revenues												
Revenues												
Expenses												
Exempt Administrative												
Faculty												
Non-Exempt Administrative												
Other Compensation												
Salaries and Wages												
Fringe Benefits												
Compensation Expenses												

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Five Year Trend

Select *Five Year Trend*
Select Desired Parameters (Steps 1-5) and Click *Finished*



Exporting Reports

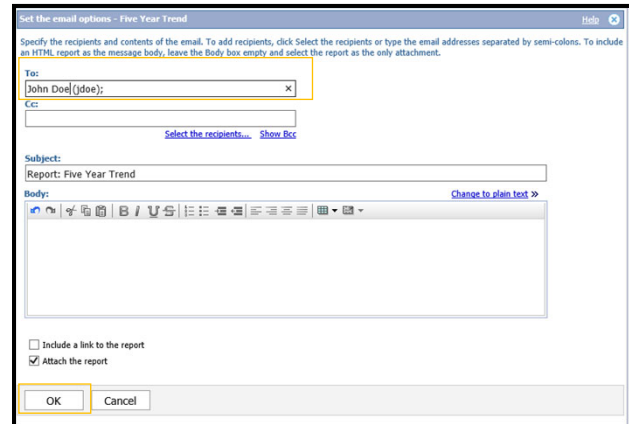
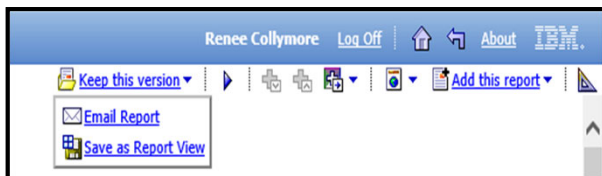
To Export into PDF: Click *View in PDF Format*
To Export into Excel: Click *View in Excel Options* and Click *View in Excel 2007 Format*

To Export into PDF: Click *View in PDF Format*
To Export into Excel: Click *View in Excel Options* and Click *View in Excel 2007 Format*



E-mailing Reports

Click *Keep this Version*
Click *Email Report*
Enter *Recipient(s)*
Click *OK*



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What Analysis Can I Create With Cognos Reports?

1. Operations Analysis
2. Budget Variance
3. Year-Over-Year Analysis
4. Vertical and Horizontal Analysis
5. COGS Analysis
6. Contribution Margin Analysis



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