

**Purpose:** This report provides a summary of transactions specific commitments based on the CAS guidelines.

**CAUTIONS:**

- Commitment items are filtered based on the CAS guidelines. Will need to change it periodically.
- Date prompts are not required, but highly recommended when running this report – selecting either of the date prompts will speed up the time it takes to return output.

**Targeted Audience:** Business Management Staff and SPS Research Quality Assurance

**Additional Resources for SPS Research Quality Assurance:** For more information on running the report using the selection of **SPS Research Quality Assurance**, and a listing of QTR Commitment Items, visit the [SPS – Post Award – Business & Regional Offices – Account Management Website](#).

**Access the Report**

Report is located at:  
[Public Folders - PROD](#) → [Boiler Insight](#) → [Standard Content](#) → [SPS](#) → [Questionable Transaction Report](#)

Access the **Cognos Login** via the [BICC](#) website, [Employee Portal](#), or by clicking the following link:  
<https://erp-reporting-prd.itap.purdue.edu>

**Complete the Prompt Page**

1. Select of one of the following date prompts:
  - **Posting Date Range** – Select a **From** and a **To** date using the calendar buttons, or enter dates (mm/dd/yyyy) into the text boxes (*Note: Do NOT leave both defaults of **Earliest date** and **Latest date** selected – it is strongly recommended that you change at least one of the posting dates or make a fiscal year selection*)
  - OR, select a **Fiscal Year** from the drop-down
  - OR, select a **Fiscal Year** AND a **Fiscal Year Period** from the drop-downs provided

2. To search by **Grant RCC**, enter at least one of the following:
  - **Grant Responsible Cost Center (Optional)** – In the **Keywords** text box, enter a number or name; click the **Search** button; **Results** are returned below; click the **Insert** button to move the result to the **Choice** box
  - **Grant Responsible Cost Center Department (Optional)** – In the **Keywords** text box, enter a number or name; click the **Search** button; **Results** are returned below; click the **Insert** button to move the result to the **Choice** box

- **Grant Responsible Cost Center Major Area (Optional)** – In the **Keywords** text box, enter a number or name; click the **Search** button; **Results** are returned below; click the **Insert** button to move the result to the **Choice** box

<p><b>Grant Responsible Cost Center (Optional)</b> <i>(Example 4018010000 - Statistics)</i></p> <p>Keywords: Type one or more keywords separated by spaces.</p> <input style="width: 100%;" type="text"/> <input type="button" value="Search"/> <p>Options ▾</p> <p>Results: <span style="float: right;">Choice:</span></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 80%; height: 100px;"></div> <div style="text-align: center;"> <input type="button" value="Insert"/>   <input type="button" value="Remove"/> </div> </div> <p style="font-size: small; text-align: center;">Select all Deselect all</p>	<p><b>Grant Responsible Cost Center Department (Optional)</b> <i>(Example 4019001 - Polytechnic Institute)</i></p> <p>Keywords: Type one or more keywords separated by spaces.</p> <input style="width: 100%;" type="text"/> <input type="button" value="Search"/> <p>Options ▾</p> <p>Results: <span style="float: right;">Choice:</span></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 80%; height: 100px;"></div> <div style="text-align: center;"> <input type="button" value="Insert"/>   <input type="button" value="Remove"/> </div> </div> <p style="font-size: small; text-align: center;">Select all Deselect all</p>	<p><b>Grant Responsible Cost Center Major Area (Optional)</b> <i>(Example 4019 - Polytechnic Institute)</i></p> <p>Keywords: Type one or more keywords separated by spaces.</p> <input style="width: 100%;" type="text"/> <input type="button" value="Search"/> <p>Options ▾</p> <p>Results: <span style="float: right;">Choice:</span></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 80%; height: 100px;"></div> <div style="text-align: center;"> <input type="button" value="Insert"/>   <input type="button" value="Remove"/> </div> </div> <p style="font-size: small; text-align: center;">Select all Deselect all</p>
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3. To search by **Sponsored Program**, enter at least one of the following:

- **Sponsored Program Cost Center (Optional)** – In the **Keywords** text box, enter a number or name; click the **Search** button; **Results** are returned below; click the **Insert** button to move the result to the **Choice** box
- **Sponsored Program Cost Center Department (Optional)** – In the **Keywords** text box, enter a number or name; click the **Search** button; **Results** are returned below; click the **Insert** button to move the result to the **Choice** box
- **Sponsored Program Cost Center Major Area (Optional)** – In the **Keywords** text box, enter a number or name; click the **Search** button; **Results** are returned below; click the **Insert** button to move the result to the **Choice** box

<p><b>Sponsored Program Cost Center (Optional)</b> <i>(Example 4019030000 - Engr Techn)</i></p> <p>Keywords: Type one or more keywords separated by spaces.</p> <input style="width: 100%;" type="text"/> <input type="button" value="Search"/> <p>Options ▾</p> <p>Results: <span style="float: right;">Choice:</span></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 80%; height: 100px;"></div> <div style="text-align: center;"> <input type="button" value="Insert"/>   <input type="button" value="Remove"/> </div> </div> <p style="font-size: small; text-align: center;">Select all Deselect all</p>	<p><b>Sponsored Program Cost Center Department (Optional)</b> <i>(Example 4019030 - School of Engineering Technology)</i></p> <p>Keywords: Type one or more keywords separated by spaces.</p> <input style="width: 100%;" type="text"/> <input type="button" value="Search"/> <p>Options ▾</p> <p>Results: <span style="float: right;">Choice:</span></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 80%; height: 100px;"></div> <div style="text-align: center;"> <input type="button" value="Insert"/>   <input type="button" value="Remove"/> </div> </div> <p style="font-size: small; text-align: center;">Select all Deselect all</p>	<p><b>Sponsored Program Cost Center Major Area (Optional)</b> <i>(Example 4019 - Polytechnic Institute)</i></p> <p>Keywords: Type one or more keywords separated by spaces.</p> <input style="width: 100%;" type="text"/> <input type="button" value="Search"/> <p>Options ▾</p> <p>Results: <span style="float: right;">Choice:</span></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 80%; height: 100px;"></div> <div style="text-align: center;"> <input type="button" value="Insert"/>   <input type="button" value="Remove"/> </div> </div> <p style="font-size: small; text-align: center;">Select all Deselect all</p>
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4. To further narrow down your results (if applicable), search by **Commitment Item (Optional)** – In the **Keywords** text box, enter a number or name; click the **Search** button; **Results** are returned below; click the **Insert** button to move the result to the **Choice** box

**Commitment Item (Optional)**  
*(Example 530005 - Telephone Rental)*

Keywords:  
Type one or more keywords separated by spaces.

Options ▾

Results: Choice:

Select all Deselect all

- To search by **Grant (Optional)** – In the text box, enter a grant number, and then click the **Insert** button to move the result to the **Choice** box

**Grant (Optional)**  
(Example 107275)

107275

Insert →

← Remove

**Choices:**

107275

[Select all](#) [Deselect all](#)

- Click the **Submit** button to run the report

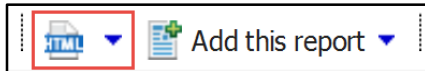
### View and Export Report

- The report output will display the **Fiscal Year Period**, **Posting Date**, fund and cost center information, **Account Manager Name**, and information about the grant, class, **Commitment Item**, and **FI Accounting Document Number**

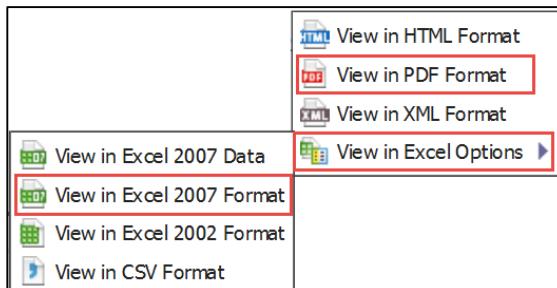
Fiscal Year Period	Posting Date	Fund	Account Manager Name	Grant Number	Grant Responsible Cost Center	Sponsored Program Number	Sponsored Program Responsible Cost Center	Co-PI Name	Sponsored Class	Sponsored Class Name	Commitment Item	Commitment Item Name Short	FI Accounting Document Number	Item Text	Total (Expense)
2016-02	8/11/2015								78420	Communications	530065	Cellular Rental			
2016-03	9/15/2015								78420	Communications	530065	Cellular Rental			
2016-04	10/27/2015								78420	Communications	530065	Cellular Rental			
2016-06	12/1/2015								78420	Communications	530065	Cellular Rental			
2016-01	7/27/2015								78420	Communications	530080	Postage			
2016-02	8/7/2015								78420	Communications	530080	Postage			

- To export the report to Excel and/or PDF format:

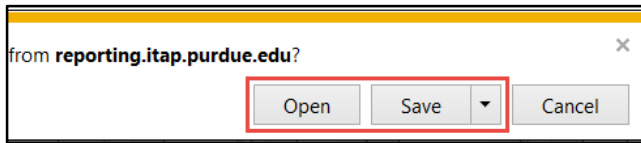
- Click the **HTML** icon located on the top right corner of the Web page




- Select **View in PDF Format** or **View in Excel Options** (Note: The best Excel view/export for this report is **View in Excel 2007 Format**)



- In the pop-up that appears along the bottom of the Web page, select either **Open**, to open the file, or **Save**, to save the file

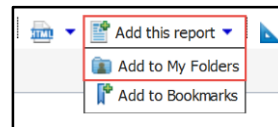



### Using the Menu Bar

Click  (**Run Report**) to go back to prompt page.



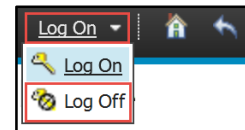
Create a quick link to this report in **My Folders**, providing the ability to organize the reports in your own folder.



Click  (**Return**) to return to the Standard Report List.



Click **Log Off** to log out of Cognos.

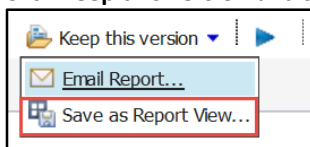


### Saving Report to My Folders and Setting Prompts

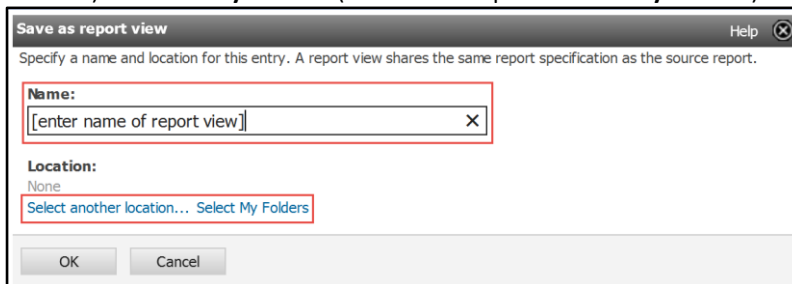
Select **Save as Report View** to save report in its current format, but in a different location, such as **My Folders**.


**Save as Report View** saves the report in its current view. To change the format, connect to live data, or change and set prompts that will be used each time a specific report view is run, follow the instructions below:

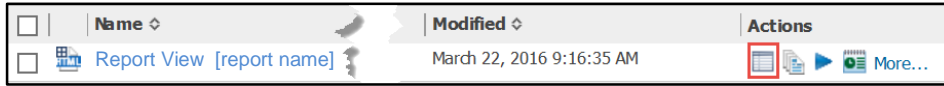
- Click **Keep this version** and select **Save as Report View...** from the drop-down



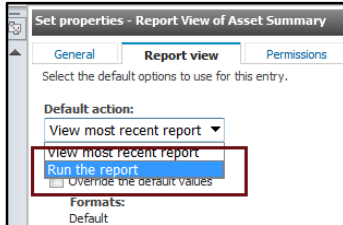
- Enter a **Name** (or keep the default) for this report view and click either **Select another location...** (to browse for a location) or **Select My Folders** (to save the report view in **My Folders**)



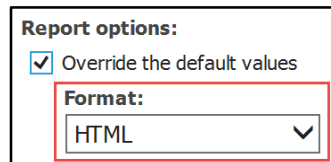
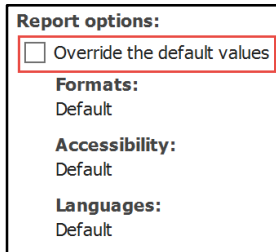
- Open the location the report view was saved to (for example, **My Folders**)
- Click the action  (**Set Properties**) on the saved report view



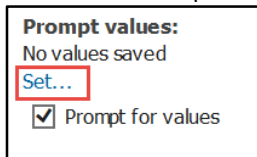
- Select the **Report View** tab, and then select **Run the Report** from the **Default actions** drop-down list



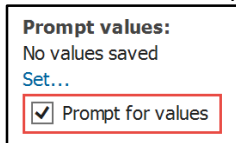
- (Optional) To change the format of the report from the default (e.g., HTML to Excel or vice versa), select the **Override the default values** checkbox, and then select the desired **Format** from the drop-down



- Select **Set ...** to set prompts (*Note: This opens the prompt page, allowing you to set the prompts that will be used each time the saved report runs*)



- (Optional) Deselect the **Prompt for values** checkbox if displaying the prompt page is unnecessary (*Note: leave this checkbox selected if you need to complete or change the prompt page each time the saved report view is run*)



9. (Optional) Click **Advanced options** to change the **Number of rows per Web page in HTML reports**, **Enable comments in saved output versions**, or set **Refresh the report cache**

Advanced options

**Number of rows per Web page in HTML reports:**  
20

Enable selection-based interactivity in HTML reports  
 Enable alerts about new versions  
 Enable enhanced user features in saved output versions  
 Enable comments in saved output versions

**Report cache:**  
 Refresh the report cache:  
 A report cache is used to optimize the performance of prompt pages. The cache is refreshed automatically when a report runs interactively and the cache is expired. You can also clear the cache at any time.

**Cache duration:**  
 Day(s)

10. Click **OK** on the bottom of the page to save the selected report view properties

OK Cancel

11. Click the saved report view located in **My Folders** (or location it was saved) to run report using the prompts and format selected

<input type="checkbox"/>	Name
<input type="checkbox"/>	Report View [report name]