



USC Total Access for Research Administration
Business Intelligence
TARA Reports – Help Guide

Date Created: October 2013

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Introduction

The TARA Reports are a part of the Total Access for Research Administration (TARA) system designed to provide users with the ability to view and analyze proposal, award and account data related to research.

TARA Reports utilizes Cognos Business Intelligence to generate reports on demand or by schedule (e.g., automatically generated monthly reports and automatically sending reports to designated recipients).

Because Cognos is not designed to provide an instantaneous response to queries, users are encouraged to generate reports in Excel format on a monthly basis. The reports can then be analyzed using Excel software.

This guide includes a walkthrough of how to access and run TARA Reports.

Current Reports

At present, these reports can be created:

- **Research Activity Report:** summarizing annual proposal, award and account by activity by investigator or academic unit.
- **Award Status Summary Report:** displaying the summary status of individual awards by investigator, unit, sponsor or other attributes, as of the time the report is generated.
- **Award Action Report by School:** listing award actions that take place by month and by school.

Additional reporting capabilities will be provided in the future, and existing reports will be enhanced with additional data fields.

Security

The system leverages **existing unit** and **account level security**, allowing users to run, view, schedule, and export reports covering the areas of their responsibility. For instance, a school level administrator can generate reports for his or her school. Requests to view data outside of one's normal responsibility should be submitted to Silvia da Costa in the Office of Research (sdacosta@research.usc.edu).

User Support

For login and technical support, the ITS Helpdesk can be reached at:

- **Phone:** (213) 740-5555
- **Email:** consult@usc.edu

For questions related to specific TARA applications, the TARA team can be reached at:

- **Email:** tarahelp@usc.edu.

For questions related to existing unit and account level security, please contact your Department or School Research Administrator or Senior Business Officer as appropriate.

Accessing TARA Reports

Logging in

TARA Reports can be accessed through the TARA portal. To login to the TARA portal, go to: <https://kc.usc.edu/kc-prd>.

USCnet Login

The resource you requested requires you to authenticate using your USC NetID (also known as your "username") and password.

USCnet Login

USC NetID:

Password:

Help with your Login

Your **USC NetID**, which is sometimes also referred to as your "username", is the first part of your USC e-mail address; the part before the "@". For example, if your email were 'ttrajan@usc.edu' you would enter 'ttrajan' in the USC NetID box. Your password is the same as the one you would use to access email using the [USC Mail](#) system. For more information, consult the ITS [Computer Accounts](#) page.

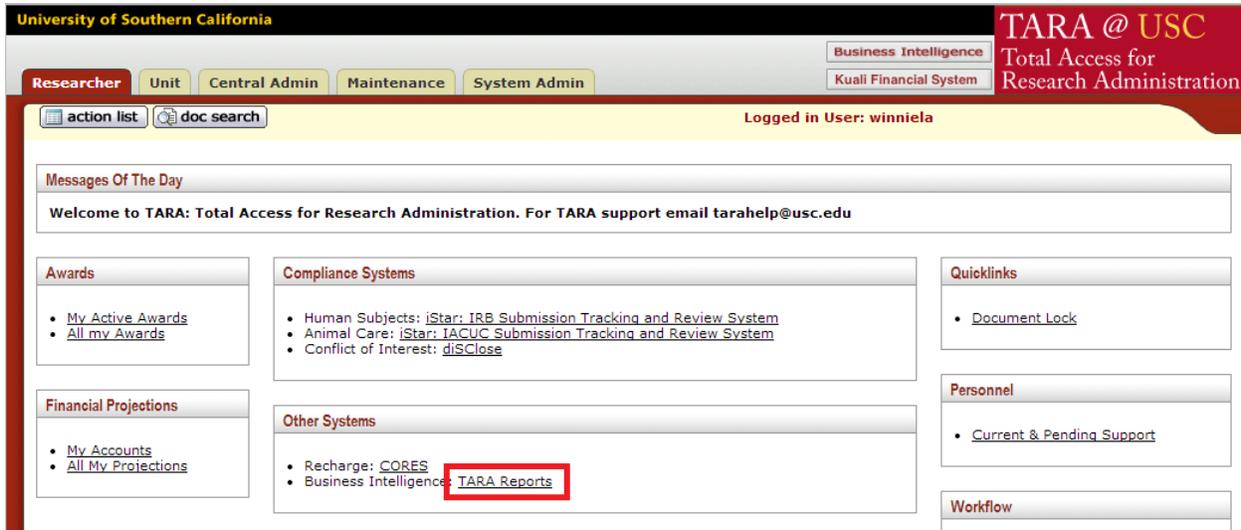
To Log Out

To ensure log out, you **must** completely quit/close your web browser.

You will be prompted for your USC NetID and Password. This is the same login as other Shibboleth/USC Net applications such as myUSC, eCert, Blackboard, etc.

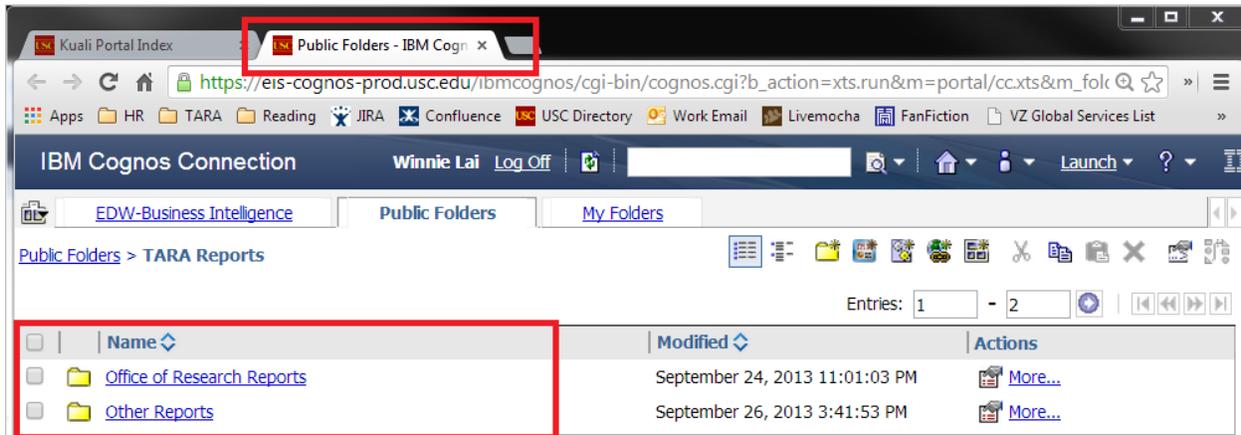
TARA Portal

To access TARA Reports, click on the [TARA Reports](#) link in the “Other Systems” section of the TARA menu.



IBM Cognos Connection

The IBM Cognos Connection page will open in a new window or tab depending on your browser and will display the available TARA Reports folders and reports.



Navigating Cognos Folders

The TARA Reports folders are much like the folders on your computer.

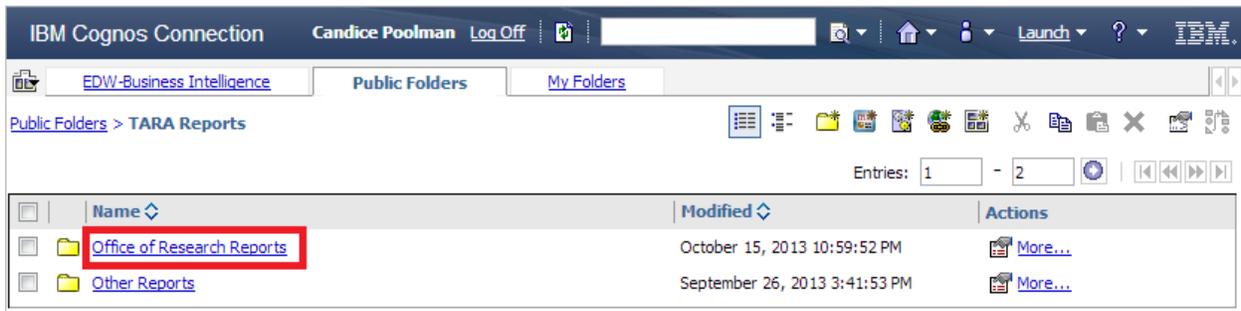
Icons

Several icons are used throughout the system. The main icons related to navigation include:

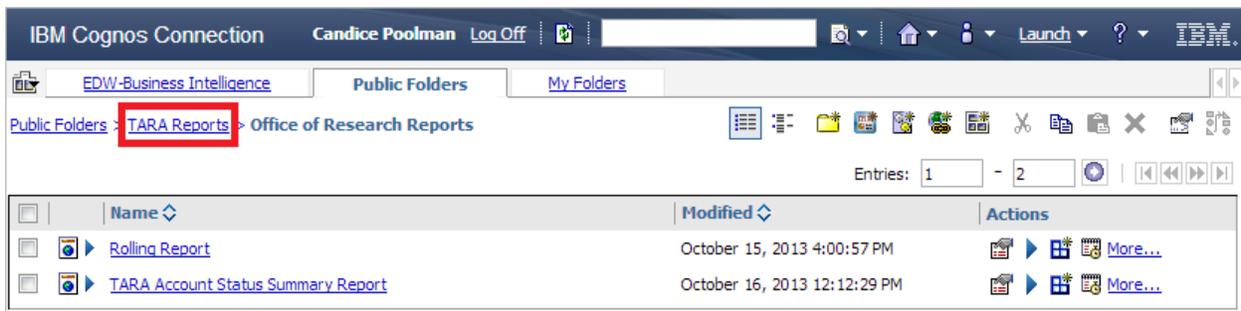
1.  This icon represents a folder that may contain one or more subfolders and/or reports.
2.  This icon represents a report that can be run.

Basic Navigation

To access a specific folder, click on the name of the folder.



To return to a previous folder from a subfolder, click on the link to the previous folder in the upper left hand corner of the screen.

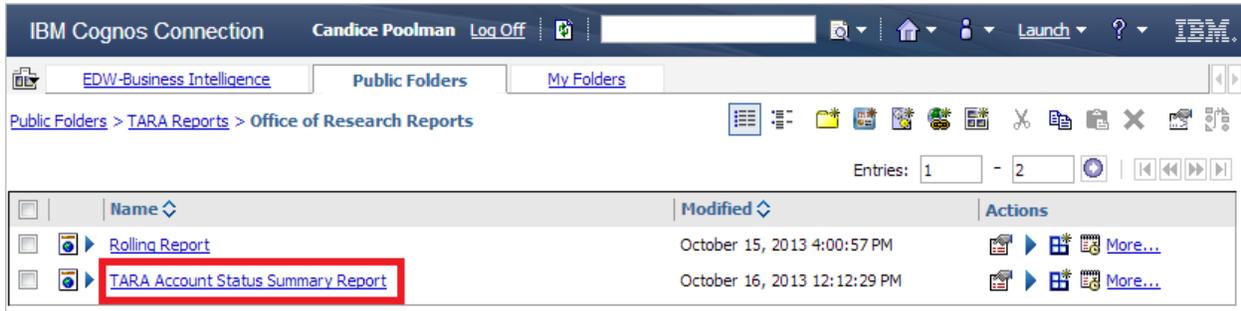


To return to a folder from a given report, click on the arrow in the upper right hand corner of the screen.

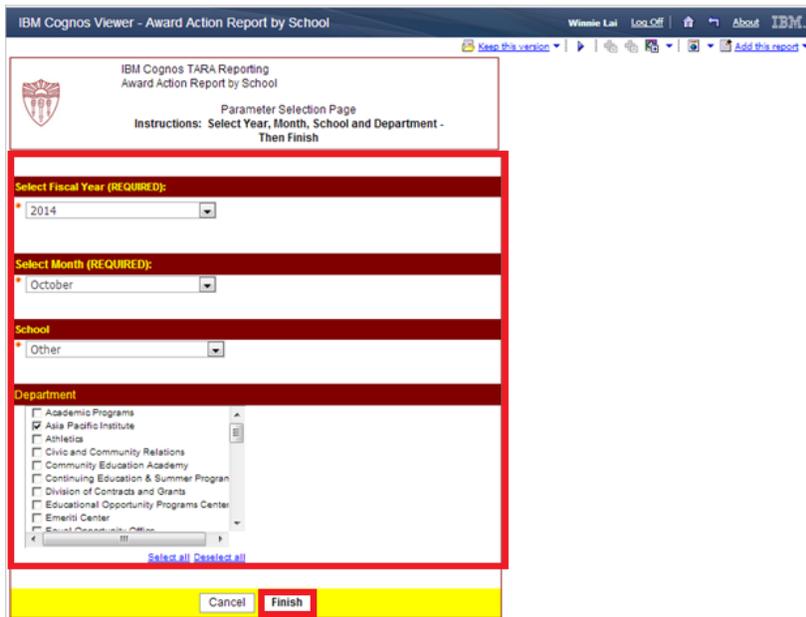


Running Reports

To run a report, click on the report name next to the  icon.



Select reporting criteria (if applicable), and click 'Finish.'



Note: Depending on the report and criteria selected, the report may take a few minutes to run. All results are returned based on your unit or account level security.

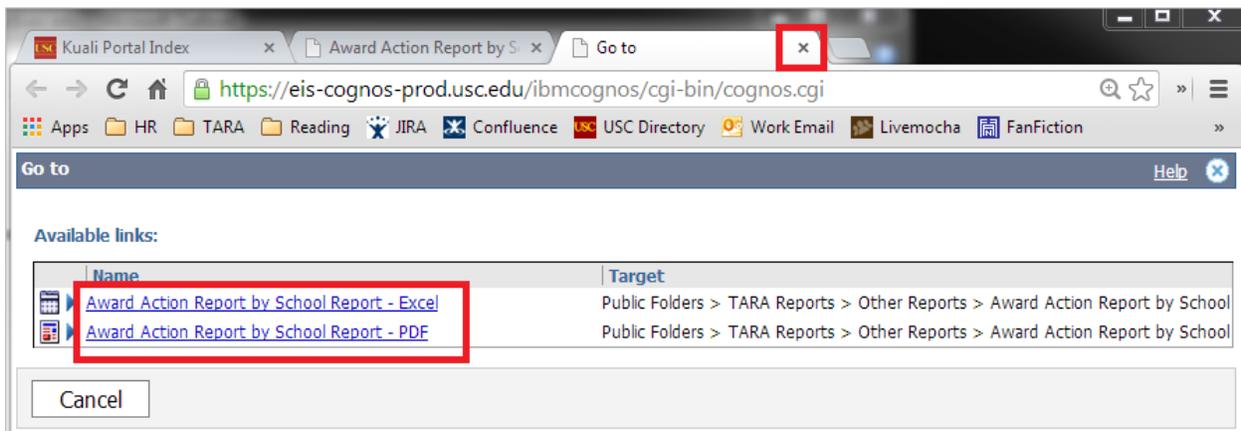
For questions related to existing unit and account level security, please contact your Department or School Research Administrator or Senior Business Officer as appropriate.

Exporting Reports

To export a report, click on the [Excel/PDF](#) link in the upper section of the report.



Select your desired option and the report will download to your computer based on your browser settings.



Note: Depending on your browser, this may open in a new window or tab. To return to your report, close the window or tab.

Emailing Reports

To email a report, click on the arrow next to the Keep this version link in the upper right hand toolbar and select Email Report.



Fill in the email prompt and click 'OK.'

Set the email options - Award Action Report by School

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To:

tommytrojan@usc.edu; tarahelp@usc.edu

cc:

Select the recipients... Show Bcc

Subject:

Report: Award Action Report by School

Body:

Include a link to the report

Attach the report

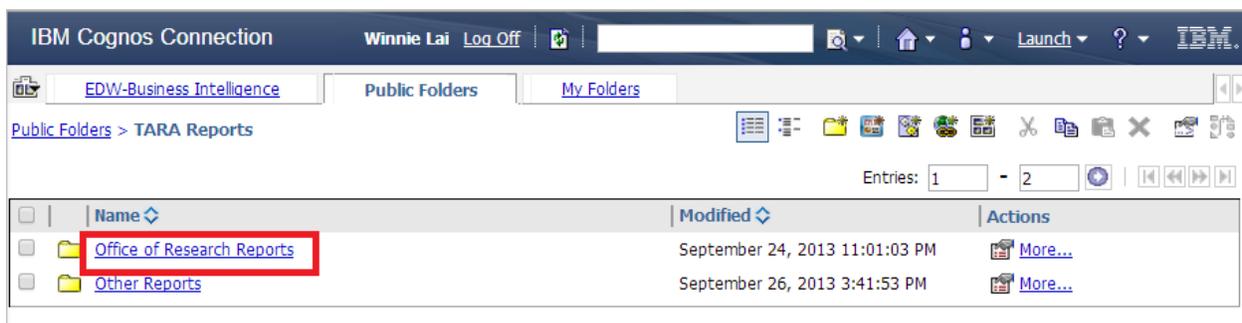
OK Cancel

Research Activity Report

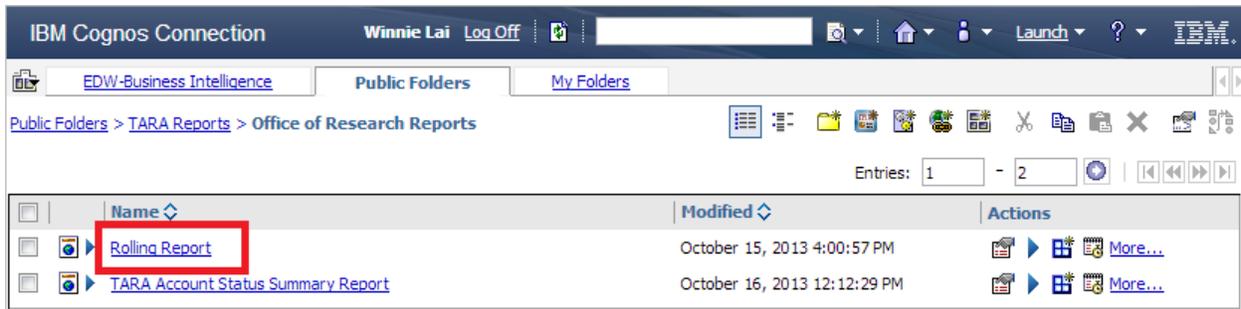
The Research Activity Report is designed to provide Schools the ability to quickly view Proposal, Award, and Account data over a selected period of time.

How to Run the Research Activity Report

To navigate to the Research Activity Report, click on the Office of Research Reports.



To run the report, click on the Rolling Report link.



Several options are provided for generating a report:

Reporting Period:

- Fiscal Year to Date: for the current year, shows activity to the date selected from July 1. For prior two years, show activity for entire year.
- Rolling Period: shows activity for three 12 month periods ending on the selected day of year. For instance, if September 30, 2013, is selected, will show activity from October 1 to September 30 of 2013, and also 2012 and 2011.
- Calendar Year to Date: for the current year, shows activity to the date selected from January 1. For prior two years, show activity for entire year.

Report Type

- Investigator – PI: shows activity by individual acting as a principal investigator
- Provost-School: shows university level activity by school
- Provost-Sponsor Type: shows university level activity by type of sponsor (e.g., industry, federal, etc.)

Primary Selection

- Designates the entities for which the report is generated. For instance, a report could be generated for an individual PI, for a selected department or school or a sponsor type. If “None/all” is chosen, the report will cover all entities for which the user has authorized access.

These options are presented in the menu that follows.

IBM Cognos Viewer - Rolling Report

Winnie Lai Log Off Home About

Keep this version Add this report

USC TARA Reporting
TARA Research Activity Report

Parameter Selection Page
Instructions: Please select Reporting Period, As of date, Report Type then select Finish.
You can further filter the report by Primary Selection and Secondary Selection (Optional)

Select Reporting Period

Fiscal Year to Date
 Rolling Period
 Calendar Year to Date

Select the As of date

Oct 16, 2013

Primary Selection: Select Report Type

Name of PI
 Department
 School
 Sponsor Type
 None/All

Investigator - PI
 Provost - School
 Provost - Sponsor Type

Select all

Search and Filter by a Secondary Research Attribute? (Optional)

Yes
 No

Cancel Finish

After choosing options, click on finish and the report will be generated. The report will display in the same window.

The following provides an example “Provost-sponsor type” report, covering federal sponsors in the rolling period format, up to September 30, 2013.

Example Research Activity Report (Rolling Report for Federal Sponsors)

IBM Cognos Viewer - Rolling Report



Page: 1

USC Office of Research

TARA Research Activity Report

Run Time: Oct 18, 2013 10:59:57 AM

Reporting Period : Fiscal Year to Date

[Excel/PDF](#)

As of Date: Oct 18, 2013

Sponsor Type	Number of Proposals Submitted			Dollar Value of Proposals Submitted (\$)			Indirect Cost Value of Proposals Submitted (\$)		
	2014	2013	2012	2014	2013	2012	2014	2013	2012
NIH	193	832	960	80,197,479	375,582,707	398,782,131	33,393,636	148,623,941	144,386,736
NSF	84	450	466	12,137,692	85,124,125	104,673,573	4,566,765	27,160,248	32,072,771
DOD	54	280	373	23,488,136	121,202,526	146,104,478	23,083,170	23,637,385	36,028,384
DOE	6	28	31	3,443,871	8,847,753	8,531,992	782,560	1,885,707	2,027,893
NASA	10	68	74	860,937	8,775,287	8,269,811	331,957	3,109,096	2,354,433
All Other Federal	35	163	181	12,658,365	46,741,912	89,719,217	3,356,697	10,484,956	18,811,108
Overall - Total	382	1,821	2,085	132,798,480	848,274,310	768,051,202	86,484,784	214,807,334	236,881,828
Sponsor Type	Number of Proposals Awarded			Dollar Value of Proposals Awarded (\$)			Indirect Cost Value of Proposals Awarded (\$)		
	2014	2013	2012	2014	2013	2012	2014	2013	2012
NIH	217	489	480	79,875,748	185,509,641	205,760,578	24,670,652	57,425,823	62,755,476
NSF	81	191	166	20,581,323	49,480,723	47,708,313	6,253,852	13,496,125	11,274,806
DOD	58	193	217	20,243,782	64,542,454	80,292,589	4,486,102	14,126,793	15,108,136
DOE	4	24	15	775,213	6,963,817	5,069,126	57,423	937,835	572,033
NASA	13	31	23	1,495,082	5,458,078	1,878,697	496,400	1,420,062	562,442
All Other Federal	42	106	114	18,450,994	32,363,550	38,657,593	3,242,618	5,654,192	7,552,175
Overall - Total	416	1,034	1,020	141,422,142	344,318,282	378,387,897	39,207,048	93,080,830	87,826,088
Sponsor Type	Number of Active Accounts			Active Account Expenditures (\$)			Active Account F&A Expenditures (\$)		
	2014	2013	2012	2014	2013	2012	2014	2013	2012
NIH	777	966	1,096	46,454,015	197,440,191	217,844,181	13,271,653	57,536,110	60,805,863
NSF	553	679	643	11,552,380	37,359,511	42,466,468	2,914,232	9,579,145	10,119,977
DOD	368	493	460	19,164,203	80,855,456	72,169,789	3,910,089	15,799,154	13,697,867
DOE	30	43	39	1,800,698	5,343,052	5,384,341	197,283	587,537	672,637
NASA	39	49	50	1,202,454	3,296,061	4,189,590	316,344	884,253	857,018
All Other Federal	256	377	395	8,235,743	38,121,811	38,021,664	1,396,346	6,826,172	7,305,016
Overall - Total	2,023	2,807	2,888	88,409,493	382,918,082	378,878,034	22,007,848	91,211,871	93,468,379
Sponsor Type	Remaining Funds in Accounts (\$)			Remaining Indirect Costs of Active Accounts (\$)			Months of Funding Remaining in Accounts		
	2014	2013	2012	2014	2013	2012	2014	2013	2012
NIH	125,819,743	122,153,445	149,254,126	51,171,016	40,596,220	50,270,066	33	7	8
NSF	69,303,008	66,394,902	59,921,179	21,684,685	19,151,620	16,179,372	72	21	17
DOD	33,114,574	40,804,965	51,110,200	8,335,933	9,902,425	12,187,365	21	6	8
DOE	2,790,636	3,097,140	3,011,596	382,968	429,484	381,943	19	7	7
NASA	3,270,280	2,874,463	1,625,374	1,048,863	1,014,711	533,822	33	10	5
All Other Federal	23,787,165	22,994,721	29,812,711	5,694,731	5,429,575	7,214,717	35	7	9
Overall - Total	263,036,408	263,318,638	284,736,146	83,317,768	78,624,036	88,787,286	35	9	9

Data Elements Included in the Research Activity Report

Column Name	Definition
Number of Proposals Submitted	Number of proposals submitted
Dollar Value of Proposals Submitted	Dollar value of proposals submitted
Indirect Cost Value of Proposals Submitted	Indirect costs of proposals submitted
Number of Proposals Awarded	Number of proposals awarded
Dollar Value of Proposals Awarded	Dollar value of proposals awarded
Indirect Cost Value of Proposals Awarded	Indirect costs of proposals awarded
Active Account Expenditures	Total expenditures of accounts
Active Account F&A Expenditures	Total indirect cost expenditure of accounts
Number of Active Account	Number of active accounts
Remaining Funds in Accounts	Remaining balance of the accounts
Remaining Indirect Costs of Active Accounts	Remaining indirect cost balance of accounts
Months of Funding Remaining in Accounts	Projection for remaining months of funding (ratio of total award amount to rate of spending)
PI Name	Name of Principal Investigator
School	School of PI's primary appointment
Sponsor Type	Name of the sponsor Type

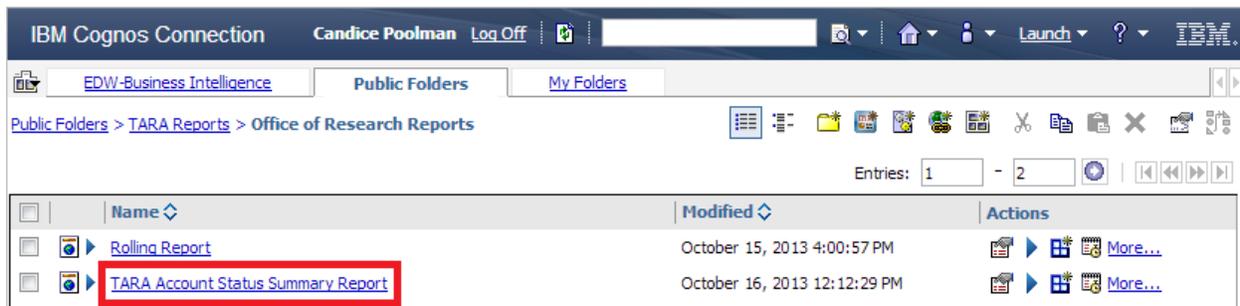
TARA Account Status Summary Report (ASSR)

The TARA Account Status Summary Report provides basic award and account data on an award by award basis.

Note: This report may take a few minutes to run as it combines data from both TARA and the Kualu Financial System.

How to Run the ASSR

To navigate to the ASSR, click on the TARA Account Status Summary Report in the Office of Research Reports folder.



Select the period and the criteria for which you would like to run the report and click 'Finish.' The report will list all awards that were active during the designated period. To list currently active awards, use the current date for both the start and end.

A Secondary Attribute can be used to further narrow down results.

Note: Depending on the criteria selected, this report may take a few minutes to run. Results will be returned based on your **Account Level Security**.

For questions related to Account Level Security, please contact your Senior Business Officer.

IBM Cognos Viewer - TARA Account Status Summary Report

Winnie Lai Log Off About IBM

Keep this version Add this report

USC TARA Reporting
Account Status Summary Report

Parameter Selection Page

Instructions: Please select a time period and a primary and/or secondary attribute to return specific records for the report. If no attribute is specified no filter will be applied to returned records. Click 'Finish' once complete.

Active Awards during this Time Period (REQUIRED):

Generate Results From: To:

Sep 30, 2013 Sep 30, 2013

Primary Selection (REQUIRED):

- Name of PI
- Name of Co-PI
- Department
- School
- Sponsor Type
- Sponsor
- Title
- Account Number
- Account Type
- Agreement Type
- None/All

Search and Filter by a Secondary Research Attribute? (Optional)

Yes

No

Cancel Finish

The report will open in the same window. An example report is provided in the following page:

Example ASSR Report (masking data)

IBM Cognos Viewer - TARA Account Status Summary Report Randolph Hall [Log Off](#)

[Keep This Version](#)   

USC University of Southern California

Page 1

USC Office of Research Account Status Summary Report Run Time: Oct 16, 2013 12:42:29 PM

Active Awards From: Sep 30, 2013 To: Sep 30, 2013 [Excel/PDF](#)

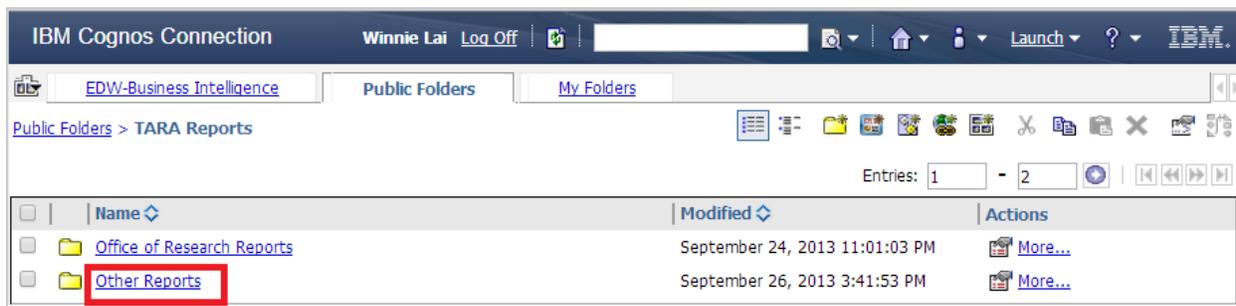
Account Type	PI Name	Account#	Co-PI Names	Project Title	Sponsor Award #	School	Department	Sponsor	Prime Sponsor	Award Type	Start Date	Project End Date	Collg. End Date	Awarded to Date (\$)	IDC Awarded to Date (\$)	ASR Budget (\$)	Spent to Date (\$)	Encumbrance (\$)	Budget Balance (\$)	IDC Spent to Date (\$)	Funds Left, Mths	Surplus/Deficit, Mths
Conference	Jeff Frank	644470851		Planning for	W0111P11111	Utah State	Information Science	Utah State		Grant	09/01/2013	07/31/2014	07/31/2014	1,800	1,800	0	0	0	0	0	N/A	N/A

Data Elements Included in the ASSR

Column Name	Definition
Account Type	Activity type of the Award
PI Name	Name of Principal Investigator
Account #	Account number
Co-Pi Names	Name of Co-Principal Investigator
Project Title	Award title
Sponsor #	Award number assigned by the Sponsor or the University, if none
School	School of Lead Unit
Department	Lead Unit assigned to the Award
Sponsor	Name of the Sponsor providing funding to USC
Prime Sponsor	Name of the prime sponsor or source of funding
Award Type	Type of Award
Start Date	Project Start Date
Project End Date	Project End Date
Oblig. End Date	Obligation End Date
Awarded to Date (\$)	Total Amount Obligated by the Sponsor to date
IDC Awarded to Date (\$)	Total indirect cost obligated to date
ASR Budget (\$)	Total Budget Balance as reflected in the Quali Financial System
Encumbrance (\$)	Total Encumbrance
Spent to Date (\$)	Total Project to Date Expenses
IDC Spent to Date (\$)	Total indirect costs spent to date
Budget Balance (\$)	Remaining balance
Funds Left, Mths	Projection for remaining months of funding (ratio of total award amount to rate of spending)
Surplus/Deficit Mths	Surplus/deficit projection, equaling projection for remaining months of funding minus months remaining until end date)

Additional TARA Reports

Additional reports can be found in the Other Reports folder in TARA Reports.



Award Action Report

The Award Action Report lists all actions for a given department or school. This report is based on unit level security. For questions related to unit level security, please contact your Department or School Research Administrator.

Note: This report returns all award actions, including voided records.

Data Elements Included in the Award Action Report

Column Name	Definition
Sponsor Award Number	Award number assigned by the Sponsor or the University, if none
Account Number	Account number
KC Award Number	Award number assigned by KC
Document Number	E-document number assigned by KC
KC Award Version	Version number of the KC Award
PCR ID	AIS record ID (if applicable)
Award Status	Status of the Award
Award Type	Type of Award
Activity Type	Activity type of the Award
Transaction Type	Type of Award transaction
Current Action Amount (\$)	Total cost of the Award action
Direct Cost (\$)	Direct cost of the Award action
Indirect Direct Cost (\$)	Indirect cost of the Award action
Notice Date	Date on which the action took place
Project Title	Award title
School	School of Lead Unit
Department	Lead Unit assigned to the Award
PI Person ID	10-digit ID of Principal Investigator
PI Name	Name of Principal Investigator
Number of COPI	Number of Co-Principal Investigator(s) listed on the Award
Sponsor Code	Code of the Sponsor providing funding to USC
Sponsor Acronym	Acronym of the Sponsor providing funding to USC
Sponsor Name	Name of the Sponsor providing funding to USC
Sponsor Type	Type of the Sponsor (i.e. Federal, Hospital, etc.)
Prime Sponsor Code	Code of the Prime Sponsor or original source of funding
Prime Sponsor Acronym	Acronym of the prime sponsor or original source of funding
Prime Sponsor Name	Name of the prime sponsor or source of funding
Project Start Date	Project Start Date
Current Period End Date	Obligation End Date
Project End Date	Project End Date

Column Name	Definition
Anticipated Total (\$)	Total Amount Anticipated from the Sponsor
Obligated Amount To Date (\$)	Total Amount Obligated by the Sponsor and available to spend
On Campus Rate (%)	On Campus Facilities and Administrative Rate, if applicable
Off Campus Rate (%)	Off Campus Facilities and Administrative Rate, if applicable