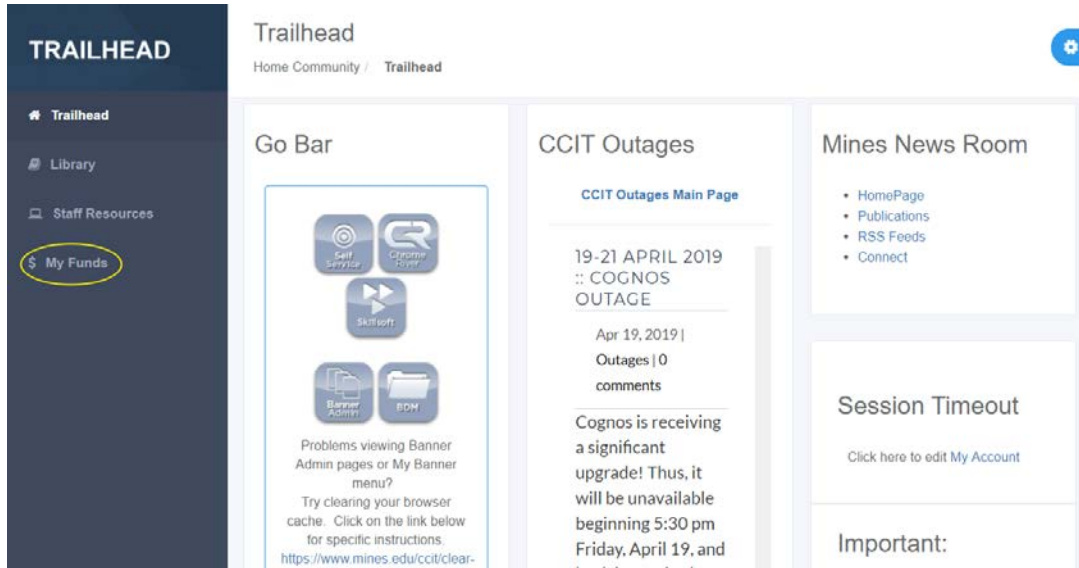


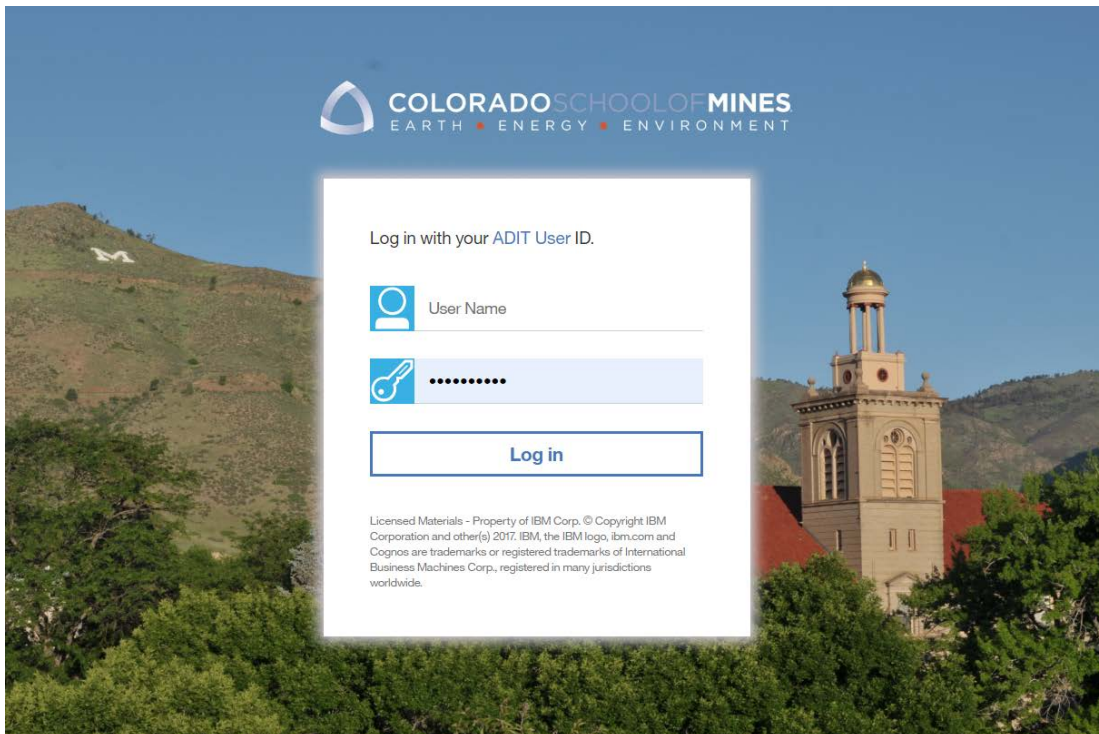
'My Funds' (AFBR - All Funds Balance Report): Trailhead Access to Cognos Login and Report Guide

1. Log In to Trailhead: trailhead.mines.edu and select '\$ My Funds' from left navigation*



*if you have bypassed the trailhead login by using a '\$ My Funds' quick link from the Mines website, you will land on the page shown in item 2 below.

2. Welcome screen for Cognos application will appear. Log in with your usual Mines credentials

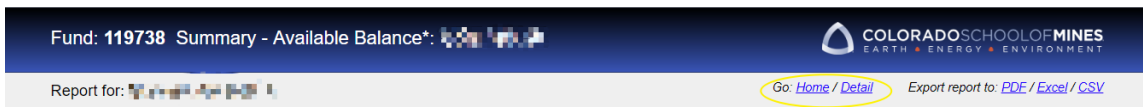


3. The 'My Funds' (AFBR - All Funds Balance Report) report will run and load automatically



[note: when using an **off-campus network, VPN connection is required** to run the any Cognos report, including the 'My Funds' report All Funds Balance Report; preferred methods are noted on the [CCIT VPN web page](#).]

4. The 'My Funds' report generates data for all funds for which a user is listed as either a PI, Co-PI or Fund Financial Manager in Banner. The report currently includes Sponsored Research, University Sponsored Research, Cost Share, Professional Development, Research Development, Foundation Gifts, School Gifts, Auxiliary and Other Departmental Cash funds.
5. From the main page, clicking on the hyperlinked Fund number will drill down into an individual Fund Balance Summary. From the summary page, Clicking on an activity amount will drill down into line item transaction detail.
6. To navigate between the main and other pages, use the '[Home / Summary / Detail](#)' hyperlinks at top right of report.



7. Other Report Functions:
- Export to PDF, Excel or CVS – clicking any of these options at top right of the report window will open up a new browser window and export the information to that format. [note: some browsers will require you to first disable Pop-Up blocking.]
 - 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.
8. For general help with the report, please see the My Funds Report (AFBR -All Funds Balance Report) section of the ORA [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.