

# Getting Started with IBM Cognos 8 Reports

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ITS CIS

2/2/2010

Introduction to some of the features in the Cognos Connection reporting portal. Guides users through initial configuration of their reports portal, locating, and running reports.

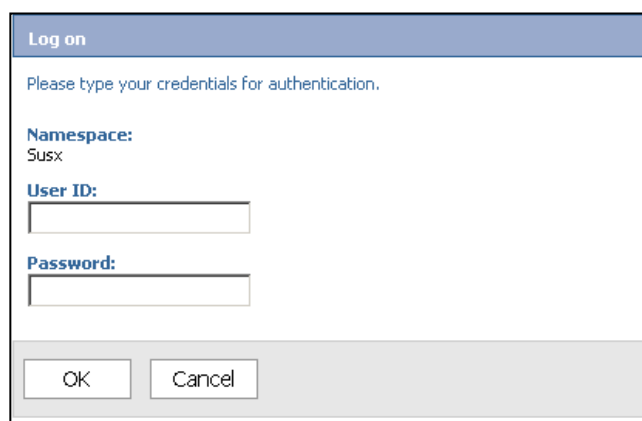
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# **1. Quick Guide to running Finance and Research Budget reports in Cognos 8**

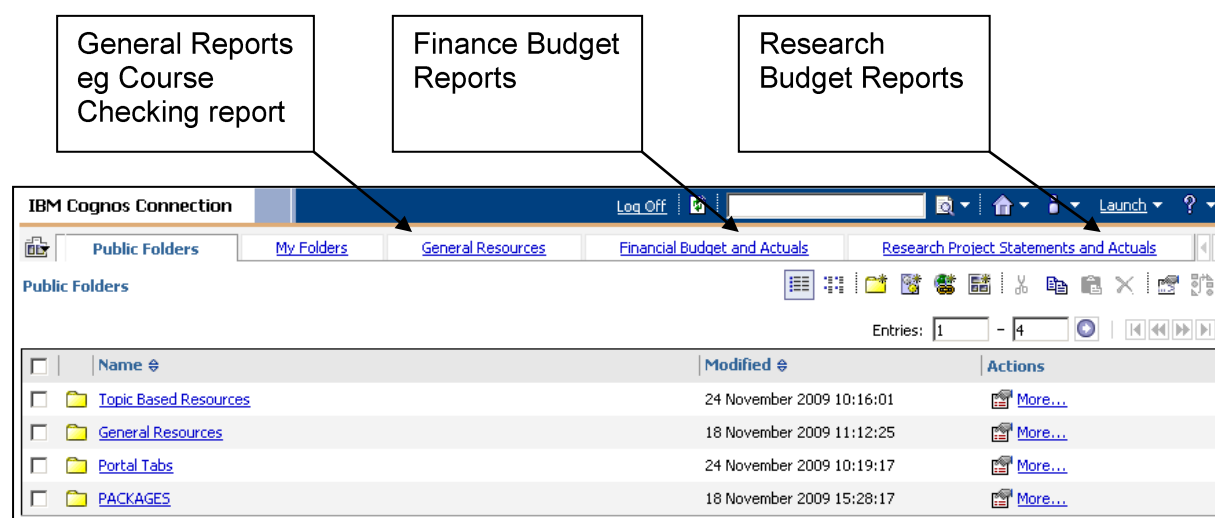
**Step 1** - Click on 'My Reports' link on Sussex Direct or 'Cognos 8 Reports' on the BIS login page.

**Step 2** - Enter your usual email login name and password.



A screenshot of the 'Log on' dialog box in IBM Cognos. The dialog has a title bar 'Log on' and a blue header. Below the header, it says 'Please type your credentials for authentication.' There are three labels: 'Namespace:' with the value 'Susx', 'User ID:' with an empty text box, and 'Password:' with an empty text box. At the bottom are 'OK' and 'Cancel' buttons.

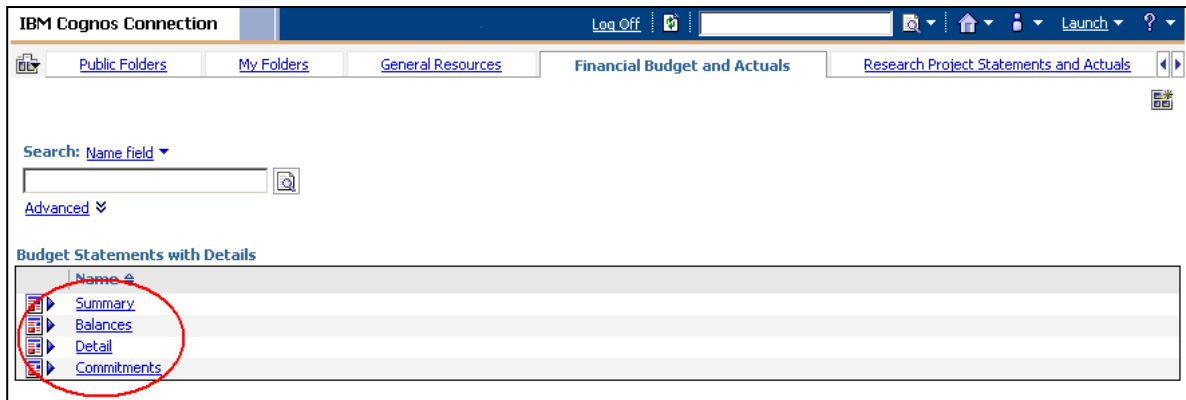
**Step 3** - Locate your report listing in the relevant Cognos portal tab. For Finance budgets click 'Finance Budget and Actuals'; for Research budgets click 'Research Project Statements and Actual'.



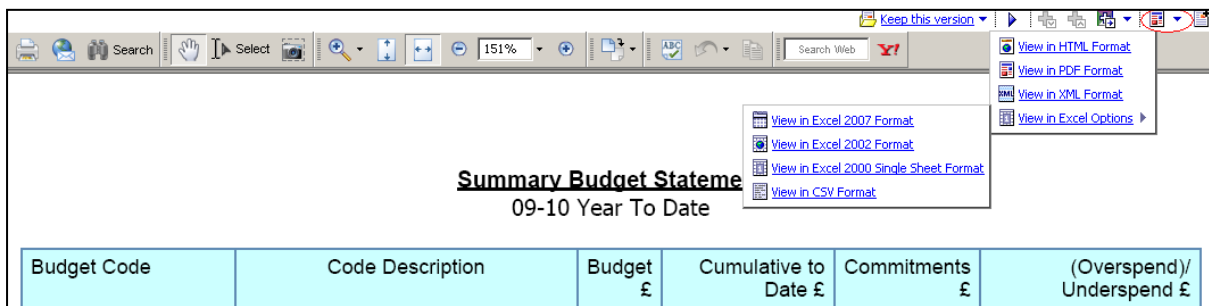
A screenshot of the IBM Cognos Connection interface. Above the main window, three boxes with arrows point to specific tabs: 'General Reports eg Course Checking report' points to 'General Resources', 'Finance Budget Reports' points to 'Financial Budget and Actuals', and 'Research Budget Reports' points to 'Research Project Statements and Actuals'. The main window shows a 'Public Folders' list with the following items:

	Name	Modified	Actions
<input type="checkbox"/>	Topic Based Resources	24 November 2009 10:16:01	More...
<input type="checkbox"/>	General Resources	18 November 2009 11:12:25	More...
<input type="checkbox"/>	Portal Tabs	24 November 2009 10:19:17	More...
<input type="checkbox"/>	PACKAGES	18 November 2009 15:28:17	More...

**Step 4** - Click on your chosen report from the report listing and enter prompt selections where appropriate.

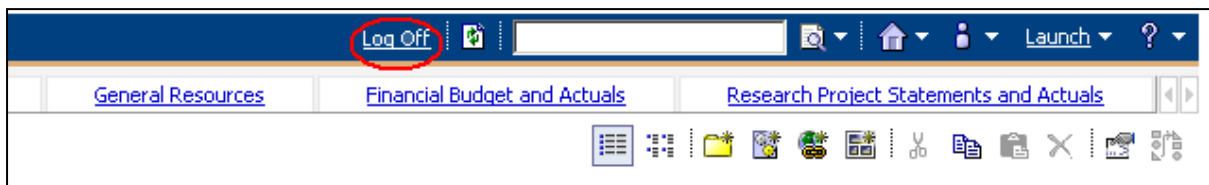


**Step 5** - Print PDF (default report format) or Save report to Excel by clicking on the down arrow next to the pdf icon then click on View in Excel Options to select the correct version for your pc.



**Step 6** - the download dialog box will then prompt you to open or save the report in the chosen format.

**Step 7** - Log out of Cognos reports by clicking the 'Log Off' link at the top to the page



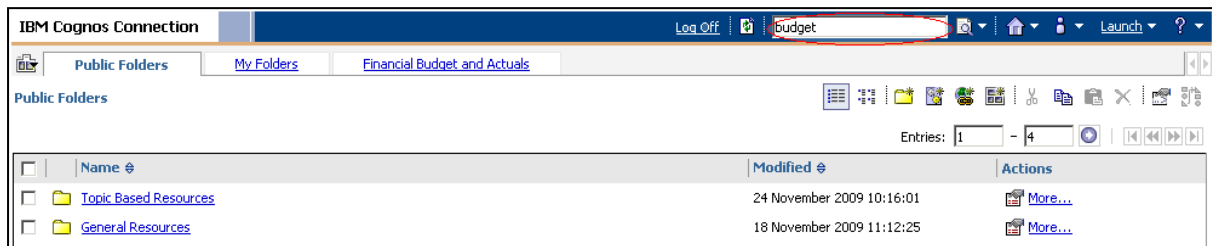
## 2. How To...

### **A. LOCATE REPORTS**

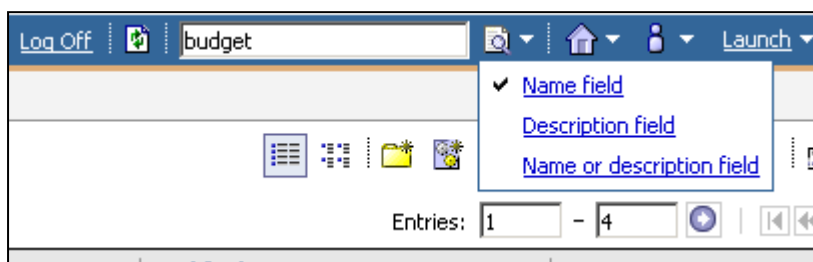
There is a quick search and advanced search facility in the Cognos Connection Portal.


#### Quick Search

**Step 1** - Type your search criteria (eg all or part of the report title) into the text box on the main portal toolbar.



**Step 2** - Select what field(s) you wish to search by clicking on the down arrow beside the search icon.

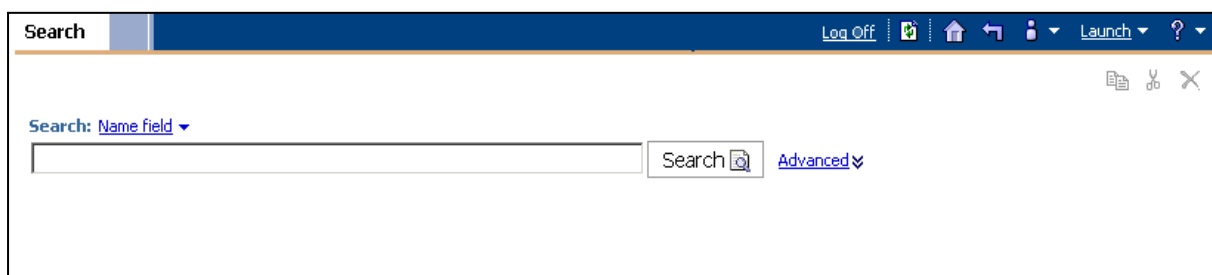


**Step 3** - Click on the search icon 

A list of items matching your criteria will be returned. Please note that the quick search by default searches all objects within the folder you happen to have open at the time (ie it may return reports but also folders, portal tabs etc). To refine your search use the advanced search facility described below.

#### Advanced Search

**Step 1** - Click on the search icon  and the search form will appear.



**Step 2** - Enter your search criteria and then refine the search by clicking on the 'Advanced' options:

- Method: results to contain the exact characters entered or start with the exact characters entered or match the exact character entered.
- Type: eg restrict your search to returning reports only by selecting type=Report
- Scope: define where to search (eg whole of public folders)
- Modified: restrict search to only return object modified within specified time frame

The screenshot shows a search interface with the following elements:

- Search:** Name field ▼
- Search input:** budget
- Search button:** Search [magnifying glass icon]
- Advanced link:** Advanced ^
- Method:** Contains the exact string ▼
- Type:** Any ▼
- Scope:** This folder and its subfolders ▼
- Modified:**
  - ✓ Contains the exact string
  - Starts with the exact string
  - Matches the exact string

**Step 3** - Click on the search button.

## B. ADD A PORTAL TAB

A number of topic and role specific portal tabs have been created to provide logical groupings for your reports. Portal tabs have been created for both the Financial Budget and Research reports you have accessed via Sussex Direct until now.

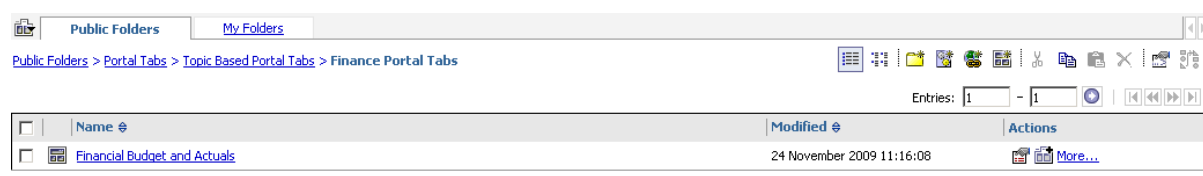
- Financial Budget and Actuals
- Research Project Statements and Actuals

These can be added to the tab area alongside 'Public Folders' and 'My Folders' to ease navigation to your reports.

To add 'Financial Budget and Actuals' portal tab to your tab area:

**Step 1** - In Public folders select Portal Tabs

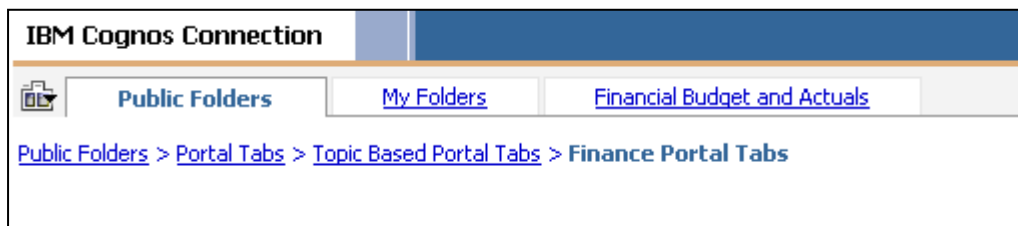
**Step 2** - Click on the folder called 'Topic Based Portal Tabs' then 'Finance Portal Tabs'



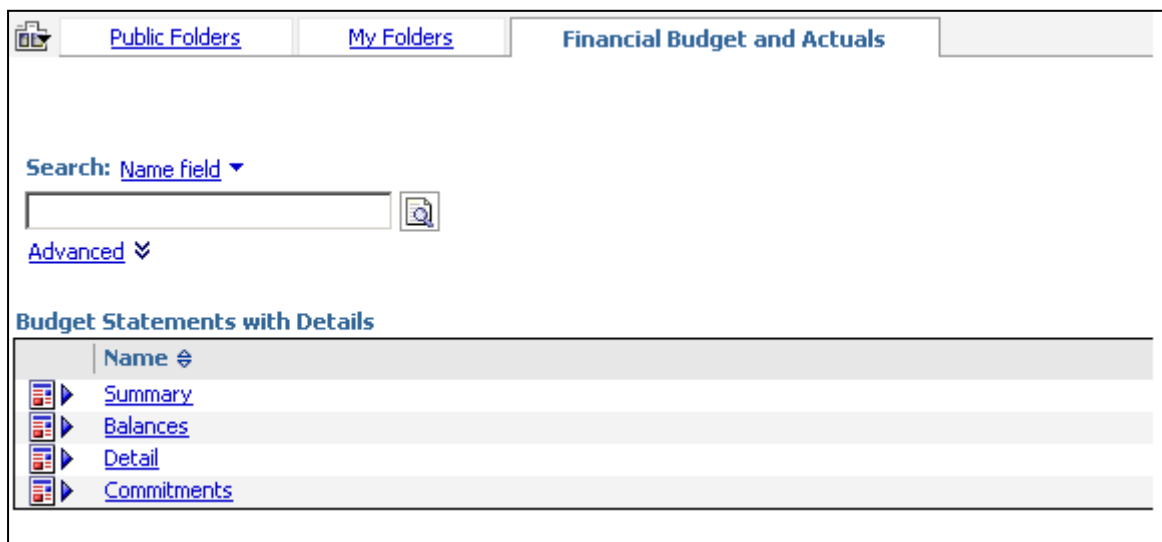
**Step 3** - One portal tab is listed: 'Financial Budget and Actuals'. Click on the add to my portal tabs icon on the right side of your screen.



**Step 4** - You will now see the portal appear next to My folders on the tab bar.



**Step 5** - Click on the newly added tab and you will see listed the 4 budget reports you are probably familiar with.












### 3. Saving Copies of your Reports

You can use your personal folder (My Folders) within the portal to save views or recently run reports.

It may be convenient to keep a view (or shortcut) for a frequently used report in your 'My folders' area for ease of access.

**Step 1** - Use the search facility (see **How to locate reports** above) or navigate via public folders to your chosen report.

<input type="checkbox"/>	Name	Modified	Actions
<input type="checkbox"/>	 <a href="#">Summary</a>	15 January 2010 10:59:48	 <a href="#">More...</a>
<input type="checkbox"/>	 <a href="#">Balances</a>	15 January 2010 10:22:15	 <a href="#">More...</a>
<input type="checkbox"/>	 <a href="#">Detail</a>	15 January 2010 10:22:32	 <a href="#">More...</a>
<input type="checkbox"/>	 <a href="#">Commitments</a>	15 January 2010 10:22:44	 <a href="#">More...</a>

**Step 2** - click on the 'create a view of this report' icon 

**Step 3** - Give your view of the report a name and description and in the location section (see below) click on 'Select My Folders' or 'Select another location' to save the report in your chosen folder.

Specify a name and description - New Report View wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:

H1205 Balances

Description:

Budget Statement for H1205

Screen tip:

Budget Statement H1205

Location:

None

[Select another location...](#) [Select My Folders](#)

Cancel

< Back

Next >

Finish


Saving your own copy of the report allows you to configure the following:

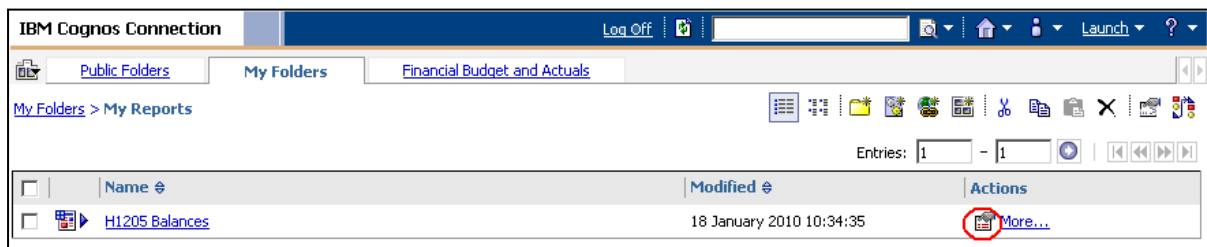
- Change the default action on the report (report can either run against the live database or simply return the last saved run of the report)



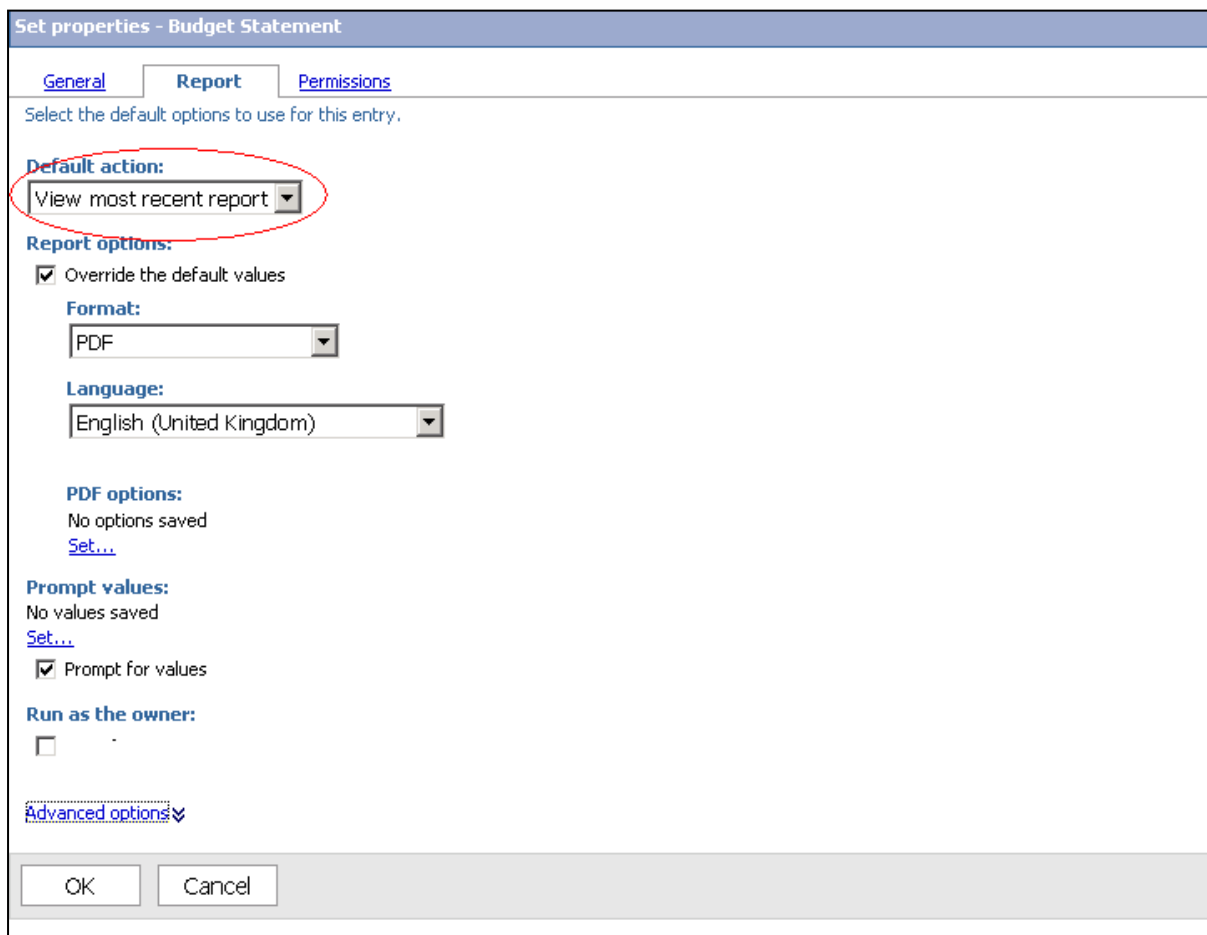
- ii. Report output – set the report output to Excel instead of the default PDF
- iii. Preset prompts – define the prompt values to use when the report runs
- iv. Save versions of the report - if a snapshot of changing data needs to be kept, then the report output can be saved and automatically versioned (ie date stamped)

#### A. CHANGE DEFAULT ACTION OF A REPORT


**Step 1** - Navigate to the location of the report in 'My Folders' and click on the report properties icon 

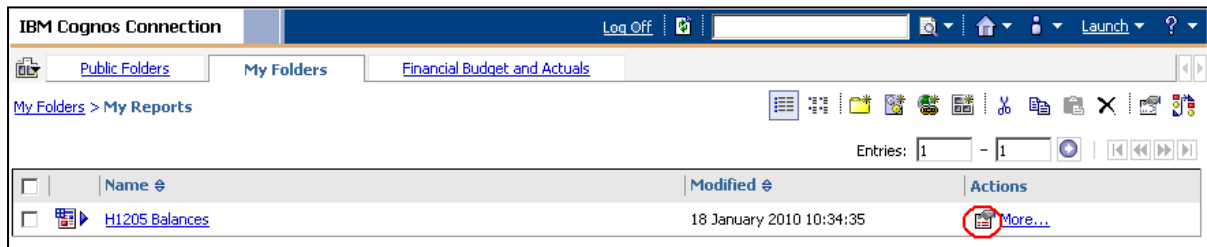


**Step 2** - In the set properties page click on the 'report' tab and then select from the drop down options to change the default action and save by clicking OK.

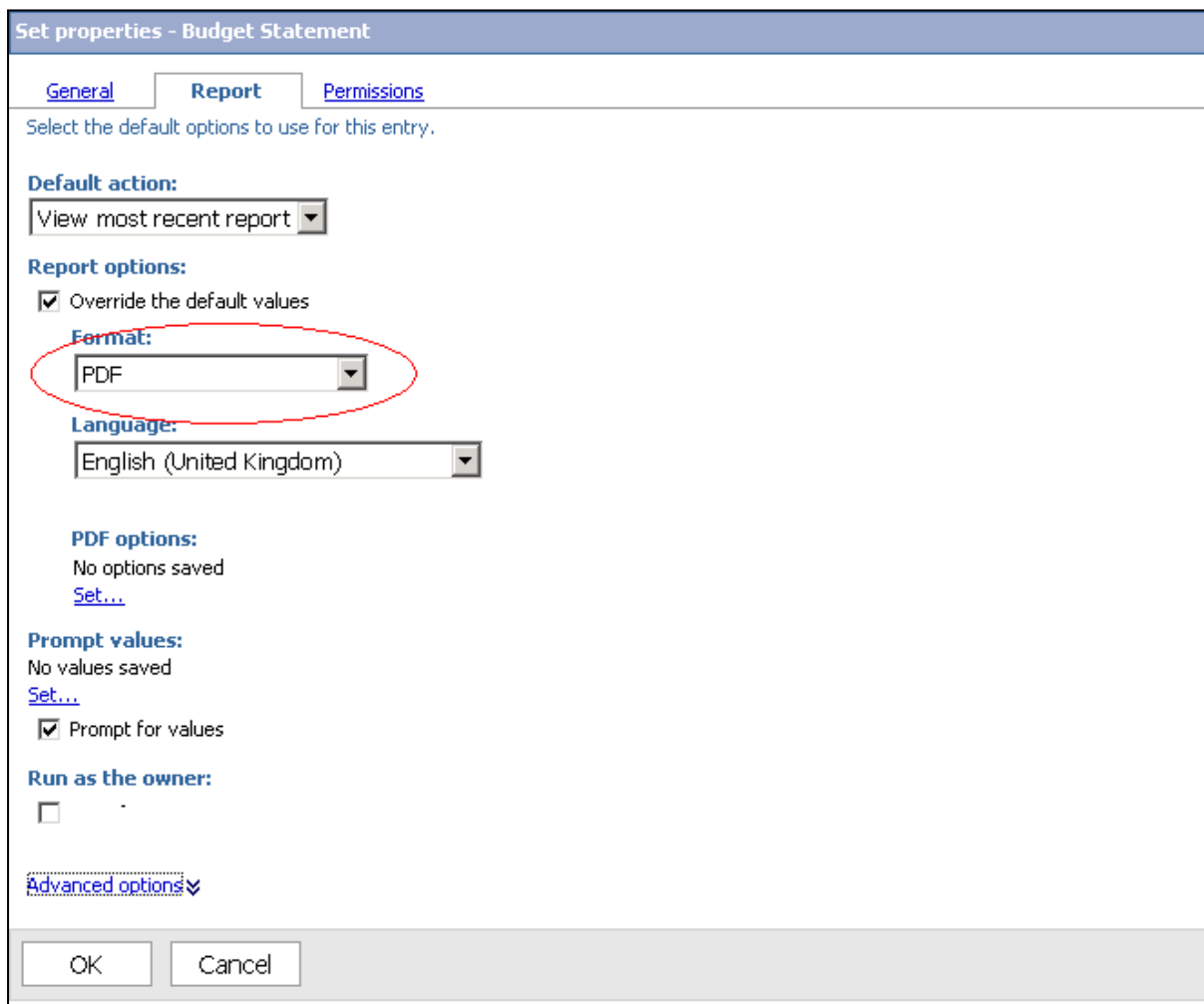


#### B. CHANGE REPORT FORMAT


**Step 1** - Navigate to the location of the report in 'My Folders' and click on the report properties icon 

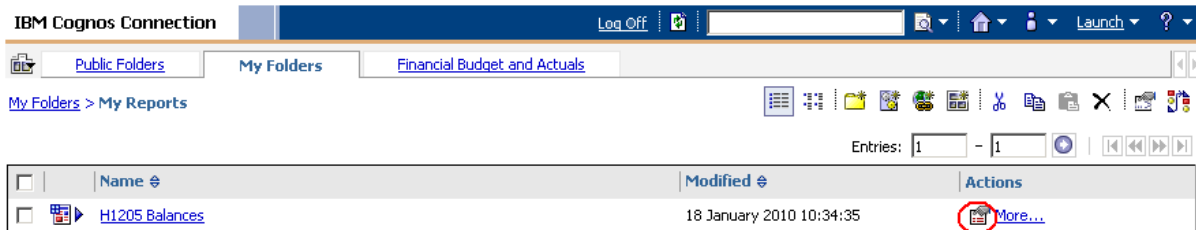


**Step 2** - In the set properties page click on the 'report' tab and then select from the drop down options to change the report output format from PDF to excel (for example).

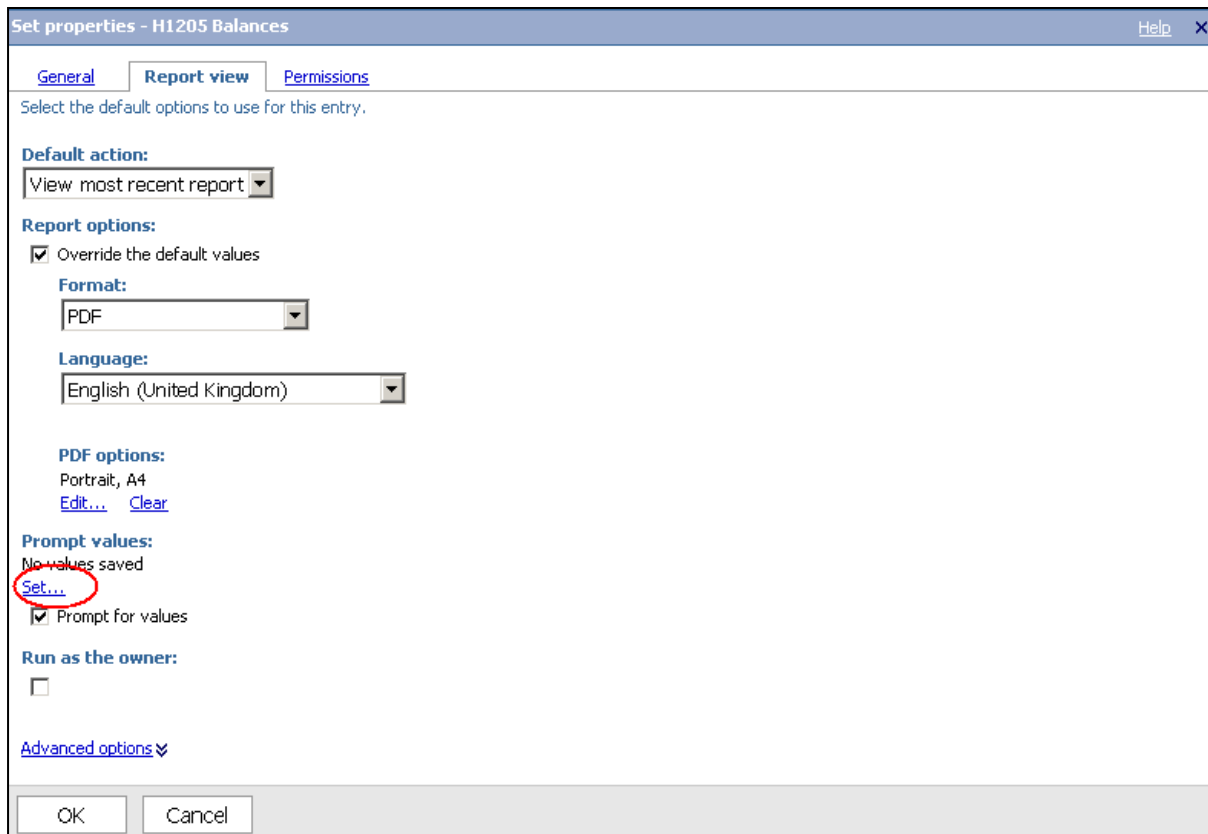


### C. PRESET PROMPT SELECTIONS

**Step 1** - Navigate to the location of the report in 'My Folders' and click on the report properties icon 



**Step 2** - In the set properties page click on the 'report' tab and then click on the 'set' hyperlink below the 'Prompt Values:' heading.



**Step 3** - make the prompt selections you wish to save in the report prompt page and click finish.

**Step 4** - the prompt values section of the report properties page will show your pre-selected prompts. Click 'Edit' to change the prompt selections or 'Clear' to continue to prompt for values. Click OK to save the changes. In the example screen below the prompt selections are being saved for the Budget Statement report.

Set properties - Budget Statement

[General](#)

**Report**

[Permissions](#)

Select the default options to use for this entry.

**Default action:**

View most recent report ▼

**Report options:**

☒ Override the default values

**Format:**

PDF ▼

**Language:**

English (United Kingdom) ▼

**PDF options:**

No options saved

[Set...](#)

**Prompt values:**

BalanceYear: '09-10'. BudgetIds: 'VYC6 -... [View all](#)

[Edit...](#) [Clear](#)

☐ Prompt for values

**Run as the owner:**

☐

[Advanced options](#) ▼

OK

Cancel