

# IBM Cognos Analytics - Navigation IBIS Reports

**Office of State Budget and Management** 

**Prepared By** 

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# **Consuming Reports**

Consumers use IBM Cognos Analytics to run pre-written reports. You can subscribe, schedule, view, download, or print report output information based on the report logic. The results can be exported into these formats

- Excel
- Excel data
- CSV (for mail merge or import into other systems)
- Adobe Acrobat (.pdf) for printing
- XML
- Web based HTML format for viewing

# **Accessing Cognos Analytics Portal**

• All users access Cognos by using IBIS Portal and by clicking on the Reports Link.

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	12-0671	Administrative Office of the Court	22001	Revision	2095-3362-2020	Submitted To C	): dataseeder	2020-10-01 4:59 P	M
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- Internet Explorer, Google Chrome, and Mozilla Firefox can be used with Cognos Analytics. Cognos is not supported with the use of Edge.
- The standard Cognos Maintenance window is Saturdays and Sunday's and outages will be communicated.

# **Navigating to IBIS Reports**

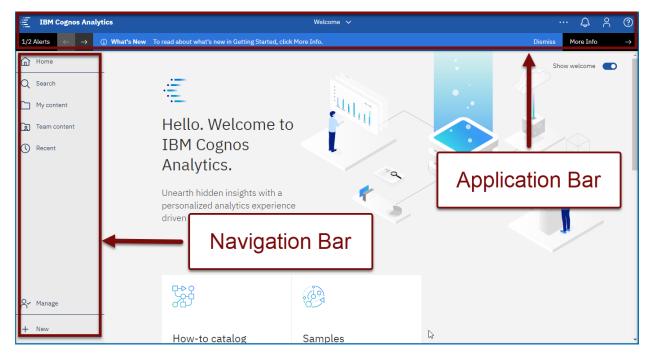
1. Click on the Reports Under Home of the IBIS Portal

2. You will be navigated to the New Cognos Portal (which is the Welcome Page)

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# **Main Portal Page Content**

The Main Portal has Application Bar and Navigation Bar



# **Application Bar**

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Now we will see what we can do with the Application Bar

#### Welcome

**Toggle between Welcome Page and Opened or New Reports** 

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	🗔 Budget	t Code Report Names	٥	rompt

- House icon ( ) indicates you are on the Home Page.
- Click ( 🙁 ) to close objects in the window.

### More



- Used to set report output as your home page (not generally recommended). (Default is main portal page)
- Capabilities change depending where you are in navigation or authoring.

### Notifications Indicator:

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's new in Getting Started, click More Info.	Dismiss	Mo	ore Info		$\rightarrow$
	Notifications				

Alerts user when subscribed reports have finished executing

#### Personal Menu

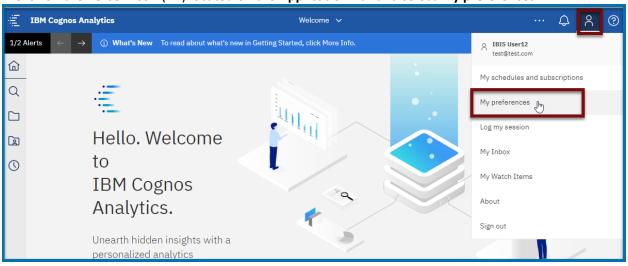
The personal menu is related to anything relating to you as a user. This includes your security settings and personal preference settings within the portal.

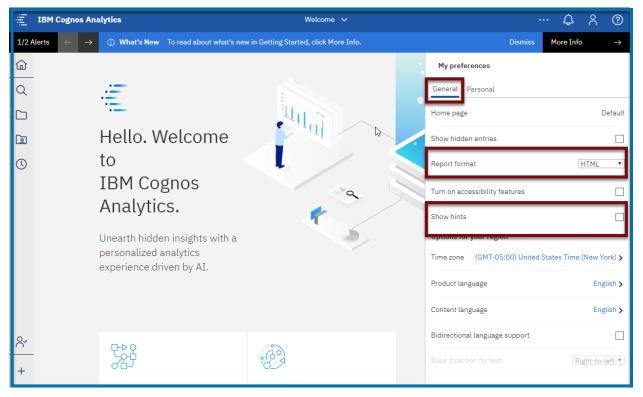
Welcome 🗸		• [	Ĵ	Å	?
's new in Getting Started, click More Info.	Dismiss More Info			$\rightarrow$	

- Settings related to you as the user.
- Includes preference settings and schedule & subscription maintenance.
- Used to sign out of Cognos.

#### **My Preferences**

## • Click on the **Person Icon** (<sup>A</sup>) located on the **Application Bar** and select **My preferences**.





**Report Format:** Users can change all reports to run in a preselected mode, but this is not recommended. Default is HTML.

Show hints: Users can turn hints on or off on the main portal page and within the authoring tool.

The current setting in this example is off, or unchecked.

#### Additional settings are not typically changed

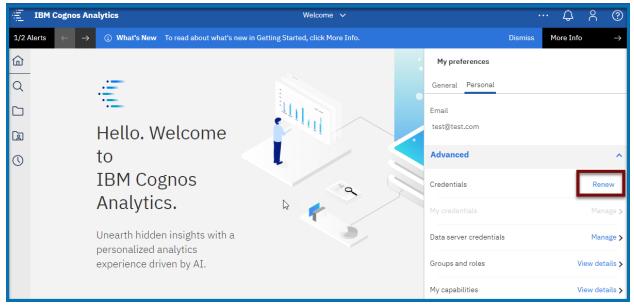
#### Select the Personal Tab

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Make Sure you have the email account to be right and it is your office email AddressUse the down arrow across from Advanced to open additional options.

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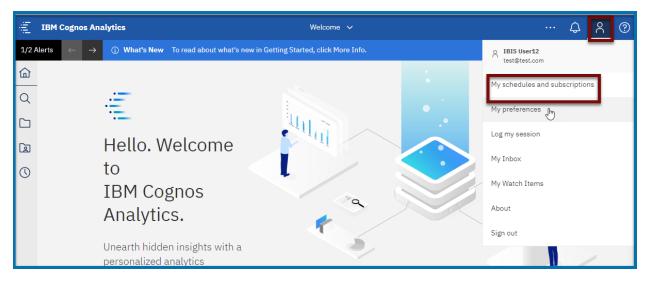
\* Renew credentials after changing your password for Subscriptions and Schedules can be found here
Click Renew after password changes for Subscriptions and Schedules to continue running.



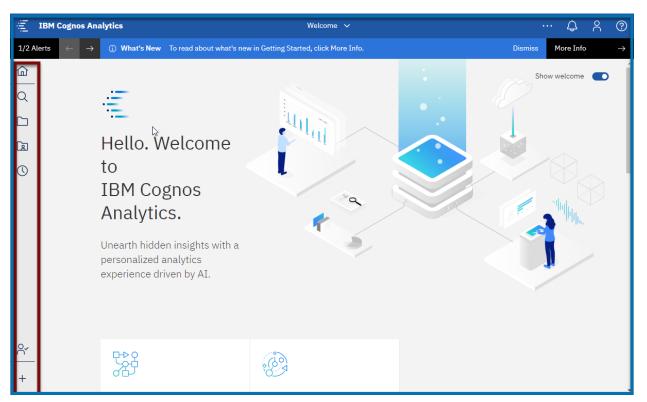
Additional settings under My preferences are not typically changed.

#### My schedules and subscriptions

Users can subscribe to a report they use often or on a regular basis. When you subscribe to a report, the subscription includes all your prompt and parameter values. My schedules and subscriptions display user subscriptions as well as schedules. It can be used to research failed report schedules, delete schedules/subscriptions, and modify schedule/subscription rules.



# **Navigation Bar**

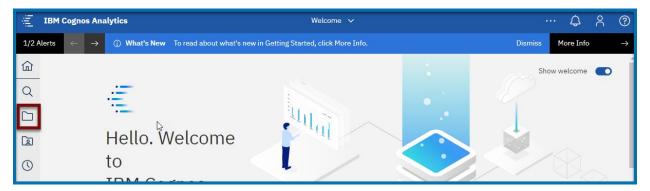


Search

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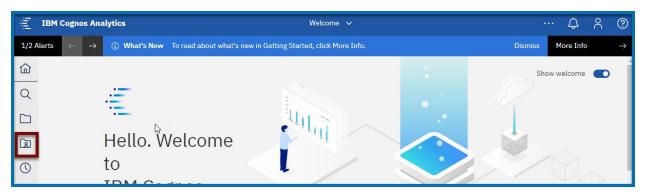
Search for items by keywords and select Enter key. Searches can be saved

## My Content



My Content folders (previously My Folders tab)

# Team Content



Team Content folders (previously Public Folders tab), This where Self Service and System Run Reports Exists

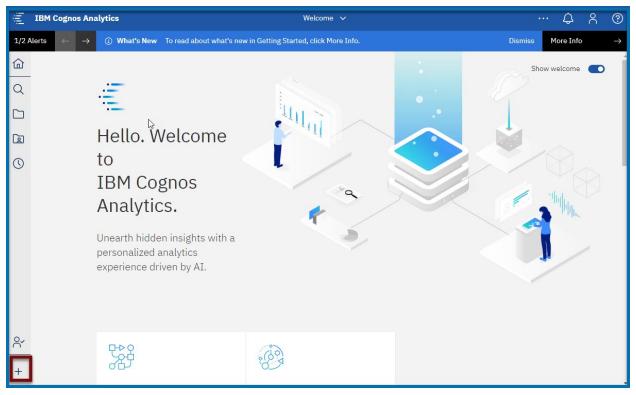
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Recently viewed report type objects and dashboards

#### New

To create a new report, Dashboard, Data Modules and Stories select the icon (authors only)



#### **Hints** Icon



The Hints icon appears beside suggested icons. Clicking on the green button will open an information box explaining what the icon can do for you.

• Each information box contains a Turn off hints link if you choose to not use the Hints icon.

Users can also disable/enable the Show hints feature under My preferences/General tab.(NOTE: ALL icon hints will be turned off).

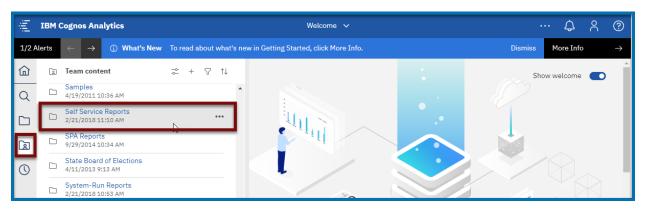
My Content	Team Content
Formerly My Folders	Formerly Public Folders
Contains objects only viewable by user	Contains standard reports and departmental
Users can copy reports from Team Content	folders and reports
folders and save to My Content for personal use	Users view items based on security

#### Icons in My Content and Team Content

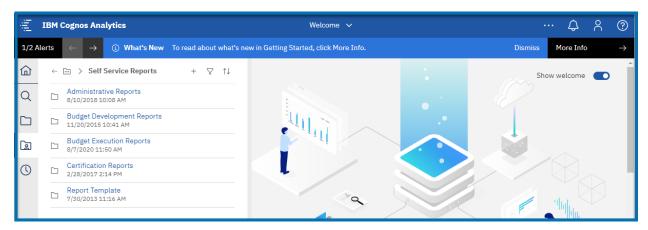
	-			ũ
Folder	Package	Report View	Dashboard	Shortcut

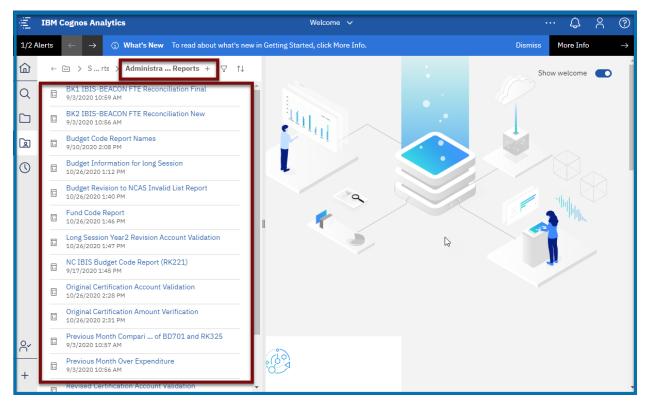
## Team Content (Formerly Public Folders)

- Click on Team Content from Navigation pane to open a windowpane. The first pane generally contains folder icons. Clicking a folder name will open anther pane.
- Click on the Self-Service Folder



Click on the Administrative Reports Folder





You will see all the reports under Administrative Reports Folder.

Click on the NC IBIS Budget Code Report (RK221)

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	3-Health and Human Services 4-Justice and Public Safety 5-Natural and Economic Resources 6-Transportation		
Q	7-Statewide Information		
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	Cancel < Back Next > Finish		

Select the prompts you want to execute the reports

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	Volume-Committee  1-Education 2-General Government 3-Health and Human Services 4-Justice and Public Safety 5-Natural and Economic Resources 6-Transportation 7-Statewide Information	Budgetary Reporting Unit	Budget Type Capital Improvement Fund General Fund Special Fund Trust Fund
	Seict al Dereict al Click here for BRU Budgeted ALL Y N	140-Office of the State Controller       ▼         Select all Deselect all       Select all Deselect all         Click here for Budget Types       General Fund Non-Reverting         ● ALL       ♥ N	Select al Danelict al Interest-bearing @ ALL @ Y @ N
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+	Cancel < Back Next > Finish		

• Hit Finish at the bottom of the screen

You will see the report output in the Format (Excel or PDF) that is default to.

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## **Breadcrumb Trail**

The breadcrumb trail keeps track of where a user has been in clicking through the folder structure. In Cognos Analytics, as users click through the folders, the breadcrumb path collapses as more folders are selected. This makes it more difficult for a user to find their "way back home."

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	1.1	BK2 IBIS-BEACON FTE Reconciliation New 9/3/2020 10:56 AM	221)
Q	1.1	Budget Code Report Names 9/10/2020 2:08 PM	
0	1.1	Budget Information for long Session 10/26/2020 1:12 PM	vert Interest Blocked Date Last PositionsDate of Closed Date
		Budget Revision to NCAS Invalid List Report	Certified Origin

Navigate to Self Service Reports and Budget Development Folder

 Click on the Self Service Reports folder located in the Breadcrumb trail and click on the Budget Development Folder

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You will see all the Sub Folders in Budget Development Folder

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Q		Worksheet I Reports 5/1/2019 2:46 PM	1										ור
		Worksheet II Long Session Reports 12/31/2014 2:34 PM	2	21)	)								
Q		Worksheet II Short Session Reports 11/5/2014 3:36 PM											
0		Worksheet III Long Session Reports 12/3/2014 1:33 PM	i	ert	Interest	Blocked	Date Last Certified	Position	sDate of Origin	Close	ed Date		

• Click on Worksheet I Reports Folder. Now you will see all the reports in Budget Development Folder.

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#### Click on Worksheet I Report

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	Worksheet I Report (Donna) 9/3/2020 10:59 AM		N	N	12/13/1999	Y	07/01/1970	12/31/9999
1.1	Worksheet I Report (Fund Purpose) 10/26/2020 4:43 PM				1210,1000			.2.0
1.1	Worksheet I SUMMARY OF 2019-21 BASE BUDGET (GENER 10/26/2020 4:34 PM	L FUND)						

Select the Report prompts that you want to execute

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۱	Fund Detail by Account			
0	Budgetary Reporting Unit	Budget Code	Status	
	Olo-General Assembly     O20-Administrative Office of the Courts     O22-Indigent Defense Services     O30-Office of the Governor     O31-Office of State Budget and Manage     O40-Office of the Lieutenant Governor     O50-Department of State Auditor     O70-Department of State Auditor     O70-Department of State Treasurer     O80-Department of Justice     The State Auditor     O90-Department of Justice     The State Auditor	<ul> <li>11000-General Assembly - General Fund 21000-General Assembly - Special Fund</li> </ul>	* Approved •	
	Select all Deselect all	Select all Deselect all		
	Click here for Budget Codes * Only Budget Codes with data for selected val	ues will show in prompt list		
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## Click on Finish

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	Total Requirements	\$75,194,566	\$74,967,502	\$74,967,502	\$0	\$74,967,502	\$0	\$74,967,502	_
	Total Receipts	\$3,338,506	\$861,000	\$861,000	\$0	\$861,000	\$0	\$861,000	
	Net Appropriation	\$71,856,061	\$74,106,502	\$74,106,502	\$0	\$74,106,502	\$0	\$74,106,502	
	Description	Actual	Certified	Authorized	Incr/Decr	Total	Incr/Decr	Total	_
	Total FTE	0.000	494.950	533.350	0.000	533.350	0.000	533.350	
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# How to Rerun the report with different Prompt Values

• Click on Run as on the Application Bar

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1/1 A	lerts 🤇	) What's New To read a	about what's new in Co	gnos Analytics, cli	ck More Info.			Dism	niss More Inf	o	$\rightarrow$
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Q										- 1	
$\sim$				Recommen	nded Base Budget (	Worksheet I)				- 1	
					Summary Report Biennium : 2021-2					- 1	
		010-General Assembly			Status : Approved	1					
.		11000-General Assembly - G	Seneral Fund							- 8	
J		Description	Actual 2019-20	Certified 2020-21	Authorized 2020-21	Incr/Decr 2021-22	Total 2021-22	Incr/Decr 2022-23	Total 2022-23	- 1	
		Total Requirements	\$75,194,566	\$74,967,502	\$74,967,502	\$0	\$74,967,502	\$0	\$74,967,502	- 8	
		Total Receipts	\$3,338,506	\$861,000	\$861,000	\$0	\$861,000	\$0	\$861,000	- 8	
		Net Appropriation	\$71,856,061	\$74,106,502	\$74,106,502	\$0	\$74,106,502	\$0	\$74,106,502	- 1	
		Description	Actual	Certified	Authorized	Incr/Decr	Total	Incr/Decr	Total		
		Total FTE	0.000	494.950	533.350	0.000	533.350	0.000	533.350		
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Click on Reset prompts and run

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<u>ش</u>	🕅 Run PDF								
Q	🛤 Run Excel								
	📧 Run Excel data		Recommen	nded Base Budget ( Summary Report Biennium : 2021-2	3				
	🕬 Run CSV			Status : Approved	I				
3	💌 Run XML	- General Fund Actual 2019-20	Certified 2020-21	Authorized 2020-21	Incr/Decr 2021-22	Total 2021-22	Incr/Decr 2022-23	Total 2022-23	
		\$75,194,566	\$74,967,502	\$74,967,502	\$0	\$74,967,502	\$0	\$74,967,502	
	Reset prompts and run	\$3,338,506	\$861,000	\$861,000	\$0	\$861,000	\$0	\$861,000	
		\$71,856,061	\$74,106,502	\$74,106,502	\$0	\$74,106,502	\$0	\$74,106,502	
	Description Total FTE	0.000	Certified 494.950	Authorized 533.350	0.000	Total 533.350	0.000	Total 533.350	
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1/1 A	erts (i) What's New To read about w	vhat's new in Cognos Analytics, click More Info.	Dismiss More Info $\rightarrow$
命		Recommended Base Budget (Worksh	eet I)
Q	Report Type	Account Level	Biennium
	All Parts     Summary Report     Summary by Purpose     Summary by Account     Fund Detail by Account	☐ By Subgroup	* 2021-23 <b>*</b>
0	Budgetary Reporting Unit	Budget Code	Status
	Olo-General Assembly     O20-Administrative Office of the Courts     O22-Indigent Defense Services     O30-Office of the Governor     O31-Office of State Budget and Manage     O40-Office of the Lieutenant Governor     O50-Department of Secretary of State     O60-Office of the State Auditor     O70-Department of State Treasurer     O80-Department of Public Instruction     O90-Department of Justice	<ul> <li>11000-General Assembly - General Fund</li> <li>21000-General Assembly - Special Fund</li> </ul>	◆ Approved     ▼
	Select all Deselect al	Select all Deselect all	
	Click here for Budget Codes * Only Budget Codes with data for selected va	lues will show in prompt list	
۴ř			
+	Cancel < Back Next > Finish		

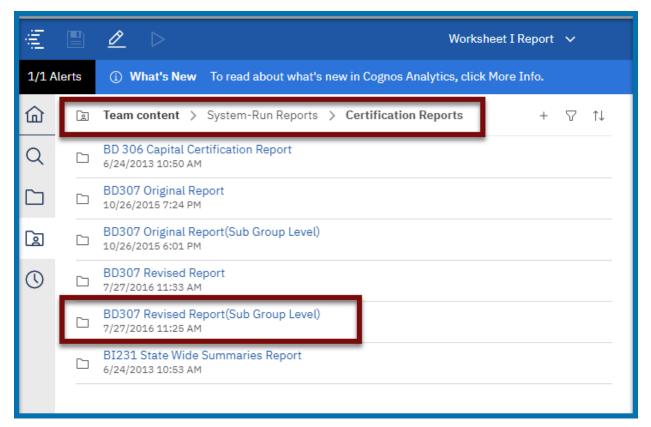
You choose the desired prompts you want it and run the report.

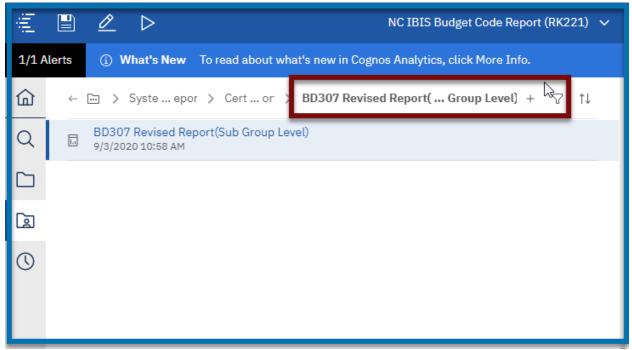
## How to Access the System Run Reports

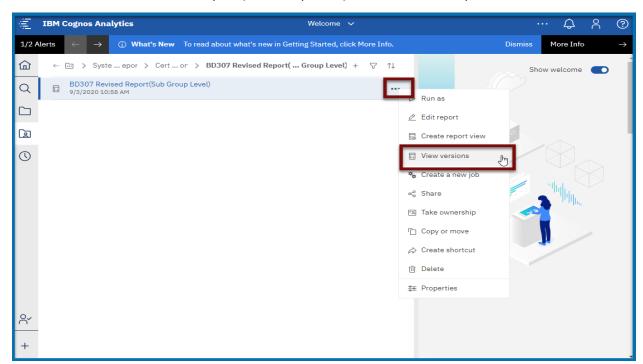
- Click on the Team Content on the Navigation Bar
- Click Collapse Item on the Windows Pane

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1/1 Alerts (i) What's New To	o read about what's new in Cognos Analytics, click More Info.
🕜 🛛 🔄 Self Ser Repo	orts > Budget Devel Reports > Worksh I Reports +
🗈 Team content 🌋 🕂	ons for Worksheet I (Dollars)
🗀 Self Service Reports	ent Report
Budget Development Reports	
RK 333B Reconciliatio	on Transfers/Receipts Report

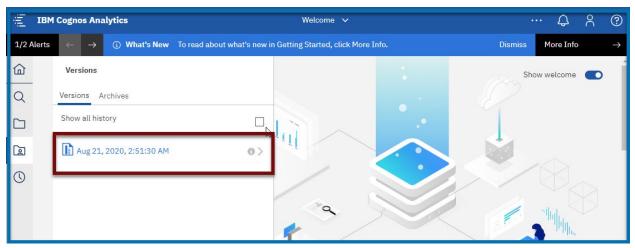
 Select System Run Reports Folder and select Certification Reports Folder and select BD307 Revised Report (Sub Group Level)



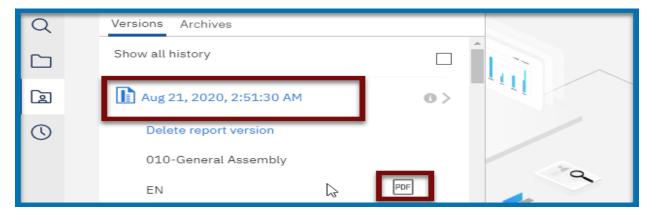




Hover on the BD307 Revised Report (Sub Group Level) and click on the Ellipses, Select View Versions

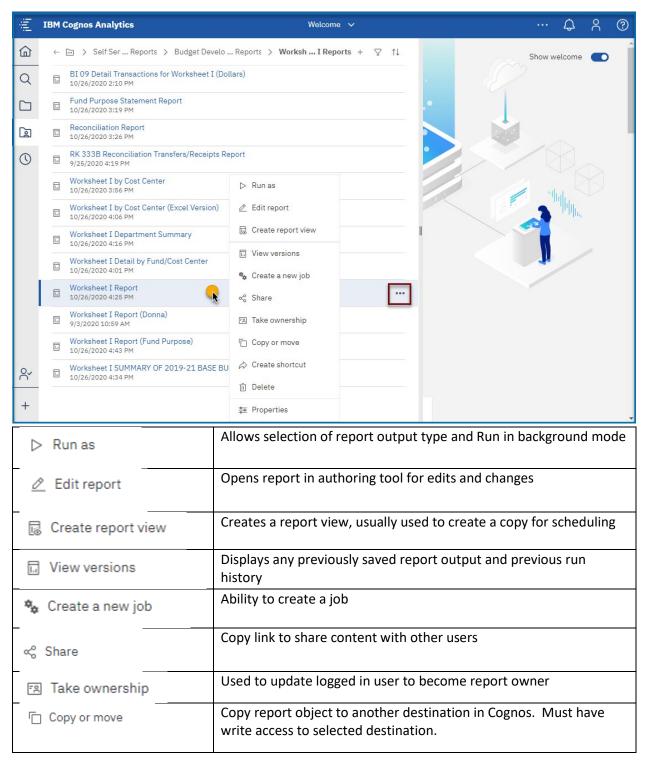


Click on Version that are shown under the version, You will see the scheduled output. Click on the PDF



#### Another Way of Executing the Report:

- Go to the Self Service Reports Folder→Budget Development Reports Folder→Worksheet I Reports Folder
- Right-click on Worksheet I report OR click the ellipsis to the right of the report name. Notice the row is highlighted and an options menu appears.



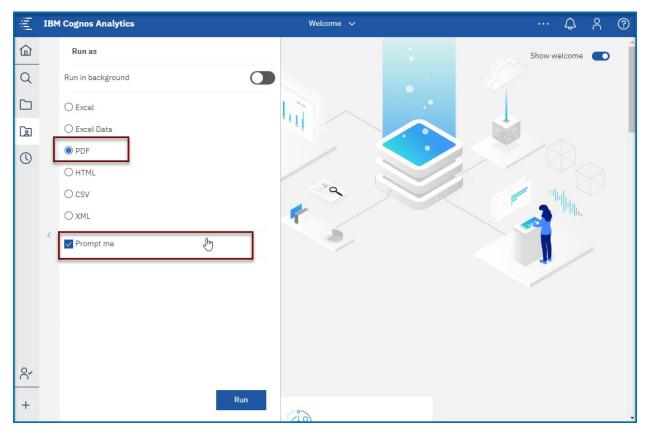
⇔ Create shortcut	Used to create a shortcut version of the report. <b>Not generally recommended.</b>
m Delete	Used to delete the report object
Properties	Displays report owner, relevant dates, report description and other options based on user Access

Note: Users may not see all these options as they are based on access and Cognos license capabilities.

Run as
 Click on Run as (

) option.

 Choose the Format you want to run. I choose the PDF option to run and Choose Prompt me to get to the Prompt Page.



• Hit Run at the Bottom of the screen

## Copying and Running the Report in the Background

 Right-click on Worksheet I report OR click the ellipsis to the right of the report name. Notice the row is highlighted and an options menu appears and Click on Copy or Move

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Q	BI 09 Detail Transactions for Worksheet I (Do 10/26/2020 2:10 PM	lars)						
	Fund Purpose Statement Report 10/26/2020 3:19 PM		.•					. 1
æ	Reconciliation Report 10/26/2020 3:26 PM							
0	RK 333B Reconciliation Transfers/Receipts Re 9/25/2020 4:19 PM	port		~				
	Worksheet I by Cost Center 10/26/2020 3:56 PM	⊳ Run as			-			
	Worksheet I by Cost Center (Excel Version) 10/26/2020 4:06 PM	∠ Edit report		8	3	ովիկը,		
	Worksheet I Department Summary 10/26/2020 4:16 PM	🗟 Create report view	1					
	Worksheet I Detail by Fund/Cost Center 10/26/2020 4:01 PM	☑ View versions ♣ Create a new job			1			
	Worksheet I Report 10/26/2020 4:25 PM	« Share						
	Worksheet I Report (Donna) 9/3/2020 10:59 AM	图 Take ownership						
	Worksheet I Report (Fund Purpose) 10/26/2020 4:43 PM	Copy or move						
2.	Worksheet I SUMMARY OF 2019-21 BASE BU 10/26/2020 4:34 PM	☆ Create shortcut						
+		m Delete						
Т		😁 Properties						-

#### Always move the Report to the My Content Folder

Сору	or mov	ve: Worksheet I Report	×
Select	a des	tination	
	← ⊡	> Self Ser Reports > Budget Develo Reports > Worksheet I Reports +	
	1.1	BI 09 Detail Transactions for Worksheet I (Dollars)	-
	1.1	Fund Purpose Statement Report	
	1.1	Reconciliation Report	
	Ŀ	RK 333B Reconciliation Transfers/Receipts Report	-
Destina	ation:	Worksheet I Reports	
		Copy to Move to Cancel	

#### Select My Content

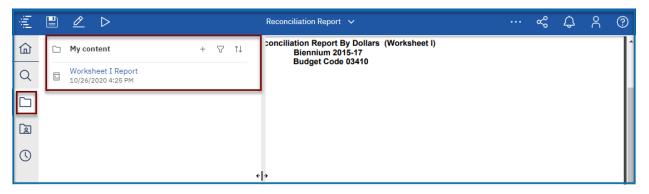
Copy or move: Worksheet I Report	×
Select a destination	
C My content	+
There's nothing in this folder.	
12	
Destination: My content	
Copy to Move to	Cancel

#### Move to

Click on Move to (

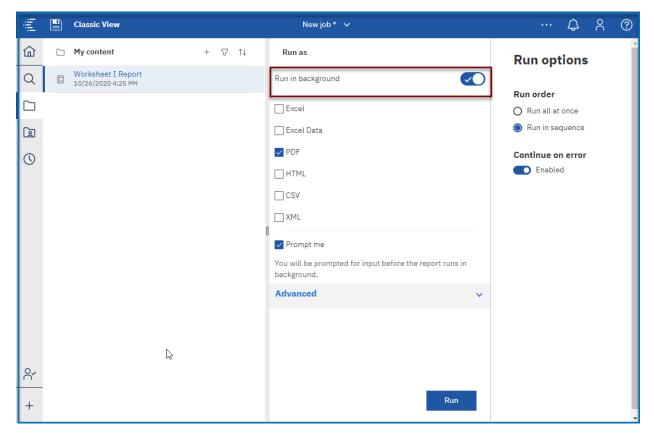
) and you will see the report in My Content

• Click on My Content and you will see the report (Here in our case it Worksheet I Report)



#### **Running the Report in the Background**

Right-click on Worksheet I report OR click the ellipsis to the right of the report name. Notice the row
is highlighted and an options menu appears and Click on Run As and Choose Run in the Back Ground



Expand Advance

	Advanced	^
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	PDF	>
	Languages	>
	Delivery	>
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- Expand Delivery
- Choose the Report by Email
- Attach the report

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- Uncheck Include a link to the report.
- Scroll to the Bottom

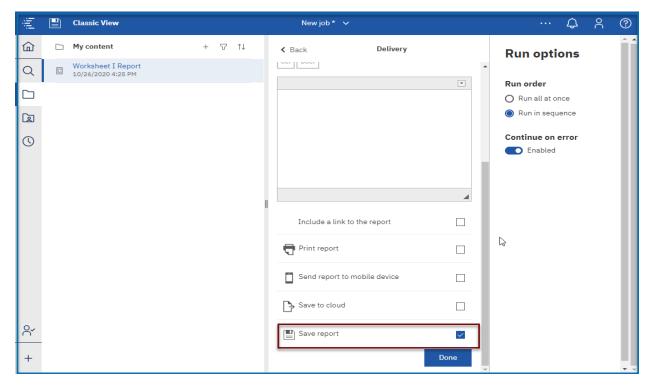


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E Classic View New job * ~ ···	ф <u></u>	?
Generating prompt inputs for report		-
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### • Click on Done at the bottom.

• Choose the Prompts you want to run

	Recommended Base Budget (Works	sheet I)		
Report Type	Account Level	Biennium		
All Parts     Summary Report     Summary by Purpose     Summary by Account     Fund Detail by Account	☐ By Subgroup	• 2021-23	¥	
Budgetary Reporting Unit	Budget Code	Status		
• 010-General Assembly 020-Administrative Office of the Courts 022-Indigent Defense Services 030-Office of the Governor 040-Office of the Governor 040-Office of the Lieutenant Governor 050-Department of Secretary of State 060-Office of the State Auditor 070-Department of Sute Treasurer 080-Department of Jublic Instruction 090-Department of Jublic	1000-General Assembly - General Fund 21000-General Assembly - Special Fund	* Approved	T	
Click here for Budget Codes Only Budget Codes with data for selected values	will show in prompt list			
		$\searrow$		
Cancel < Back Next > Finish				

Click on Finish