



IBM Cognos Analytics - Navigation

IBIS Reports

Office of State Budget and Management

Prepared By

Ashok Guntupalli, Cognos Developer

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Contents

- Consuming Reports 3**
- Accessing Cognos Analytics Portal..... 3**
- Navigating to IBIS Reports 4**
- Main Portal Page Content..... 5**
- Application Bar 5**
 - Welcome..... 5**
 - Notifications Indicator: 6**
 - Personal Menu..... 6**
 - My Preferences..... 7**
 - My schedules and subscriptions 9**
- Navigation Bar 9**
 - Search..... 10**
 - My Content 10**
 - Team Content..... 10**
 - Recent..... 11**
 - New..... 11**
 - Hints Icon..... 11**
 - Icons in My Content and Team Content..... 12**
 - Team Content (Formerly Public Folders) 12**
 - Breadcrumb Trail..... 15**
 - How to Rerun the report with different Prompt Values 18**
 - How to Access the System Run Reports 19**
 - Another Way of Executing the Report: 22**
 - Copying and Running the Report in the Background..... 24**

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.

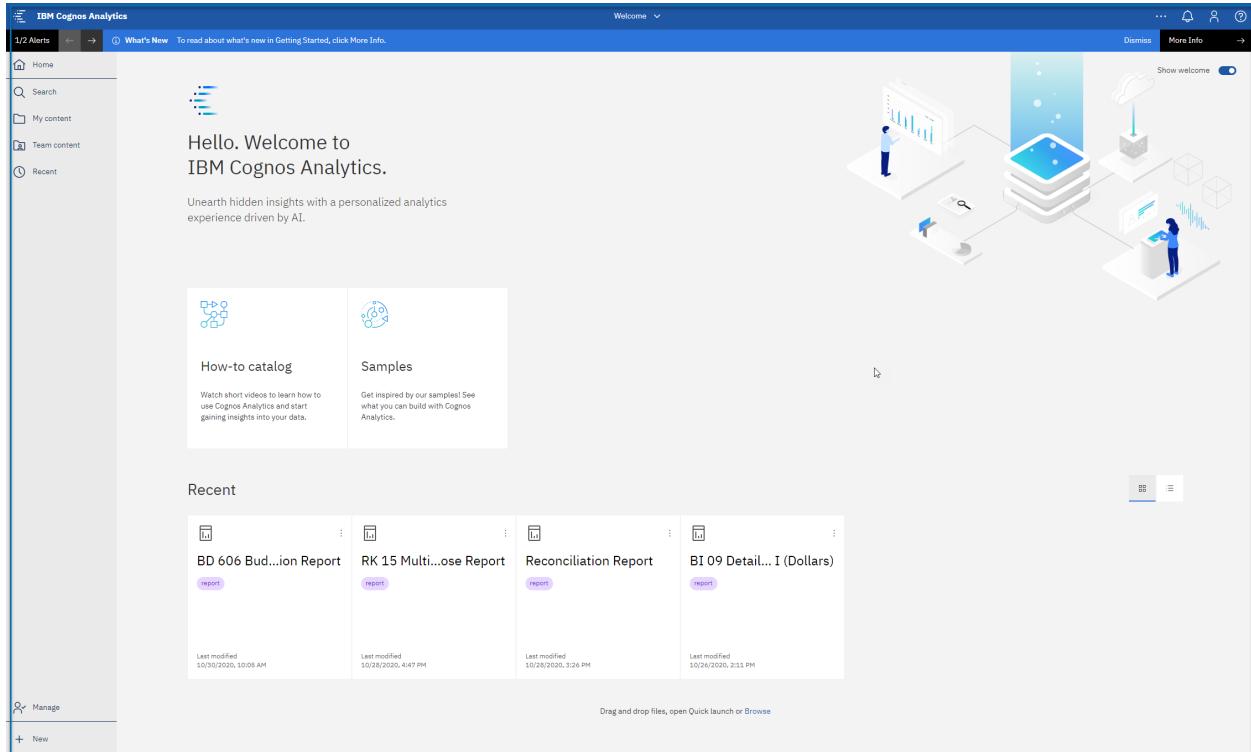
The screenshot shows the IBIS portal interface. At the top, it says 'Logged in as IBIS User12' and 'My Account Settings Logout'. The main header is 'STATE OF NORTH CAROLINA OFFICE OF STATE BUDGET AND MANAGEMENT'. Below this, there's a navigation menu on the left with 'Home', 'OSBM Work Queue', 'My Messages', 'Reports' (highlighted with a red box), 'Salary Control', and 'Short And Snappy'. The main content area is titled 'OSBM Work Queue' and contains a table of requests. The table has columns for Ref#, BRU, Budget Co, Type, Name, Status, Updated By, Loc, and Last Updated. The table lists various requests from different departments like Department of Justice, Administrative Office of the Court, Division of Mental Health/Development, North Carolina Agricultural and Forestry, Department of Public Safety, Department of Labor, and Winston-Salem State University.

Ref#	BRU	Budget Co	Type	Name	Status	Updated By	Loc	Last Updated
12-0108	Department of Justice	13600	Revision	Test Upload	OSBM Draft	ibisuser11		2020-10-29 4:09 PM
SL 888999	Administrative Office of the Court	12000	Certification	SL - 999 9	OSBM Draft	ibisuser11		2020-10-26 12:37 AM
	Administrative Office of the Court	12000	Certification	SL 2020 97 12	OSBM Draft	ibisuser11		2020-10-26 12:24 AM
	Administrative Office of the Court	12000	Certification	SL 2020 97 11	OSBM Draft	ibisuser11		2020-10-26 12:21 AM
12-0839	Division of Mental Health/Develop	14460	Revision	Healthy Transitions - Year Three Rea	OSBM Draft	ibisuser11		2020-10-13 2:19 PM
12-0116	North Carolina Agricultural and Te	16070	Revision	FY2021 SUMMER TERM TRANSFE	Submitted To O:	ibisuser11		2020-10-02 3:17 PM
			Worksheet-I	Test 111	OSBM Draft	ibisuser11		2020-10-02 3:05 PM
11-2230	Department of Public Safety	14550	Revision	SCP's LI RECEIPT SUPPORTED IN	Submitted To O:	ibisuser11		2020-10-02 2:57 PM
			Worksheet-I	test	OSBM Draft	ibisuser11		2020-10-02 2:55 PM
12-0202	Department of Labor	13800	Revision	NCDOL_Indirect Cost Adjustment / C	Submitted To O:	dataseeder		2020-10-01 5:30 PM
12-0671	Administrative Office of the Court	22001	Revision	2095-3362-2020	Submitted To O:	dataseeder		2020-10-01 4:59 PM
AR-X505	Winston-Salem State University	16084	Allotment	2nd quarter allotment - FY21	Submitted To O:	dataseeder		2020-10-01 4:56 PM
12-0118	Department of Public Safety	24550	Revision	LE - LE DESIGN FOR CONTROL	Submitted To O:	dataseeder		2020-10-01 4:36 PM

- 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.

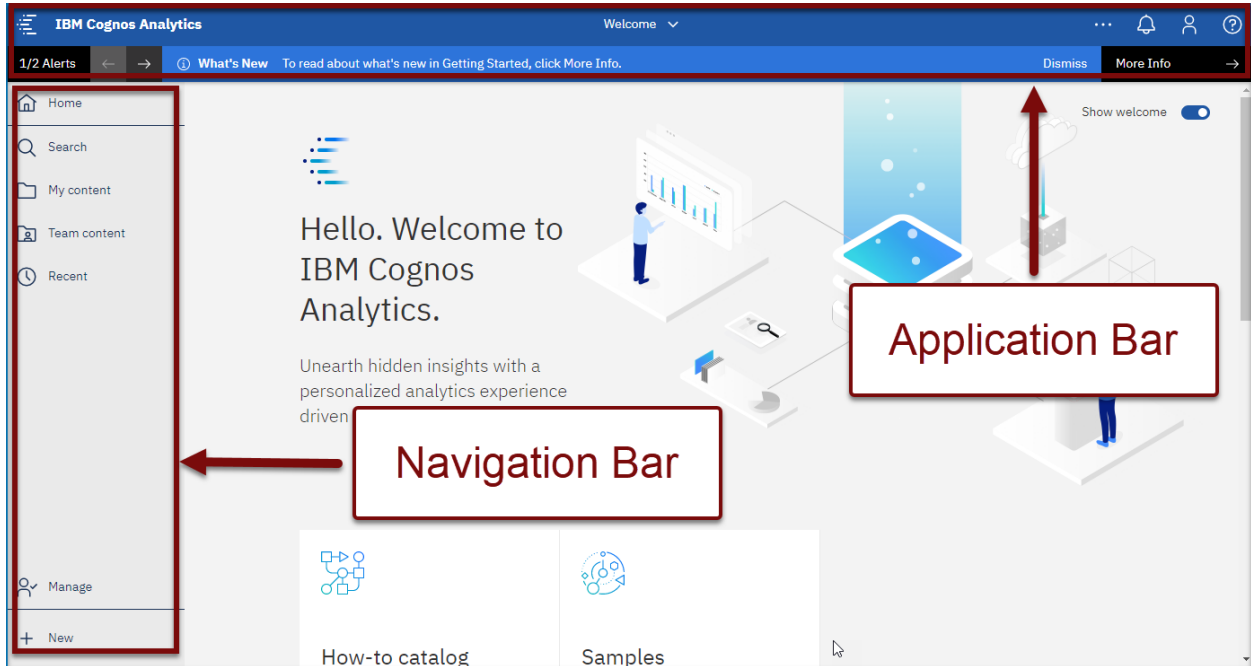
Navigating to IBIS Reports

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)

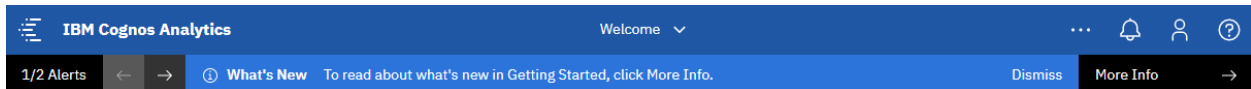


Main Portal Page Content

The Main Portal has Application Bar and Navigation Bar



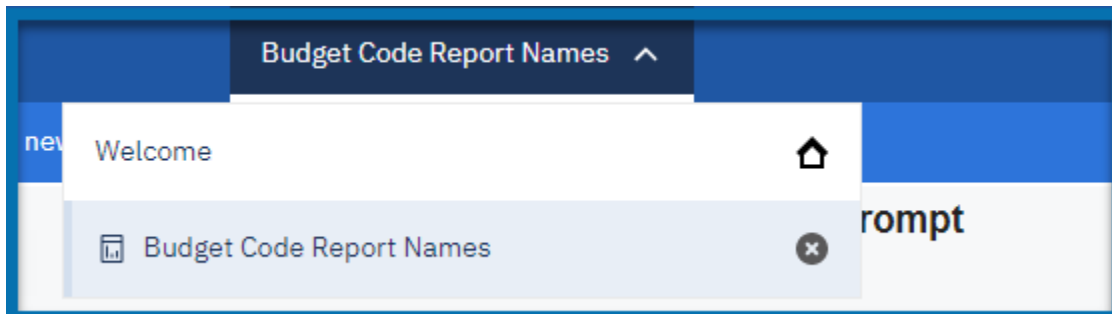
Application Bar





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

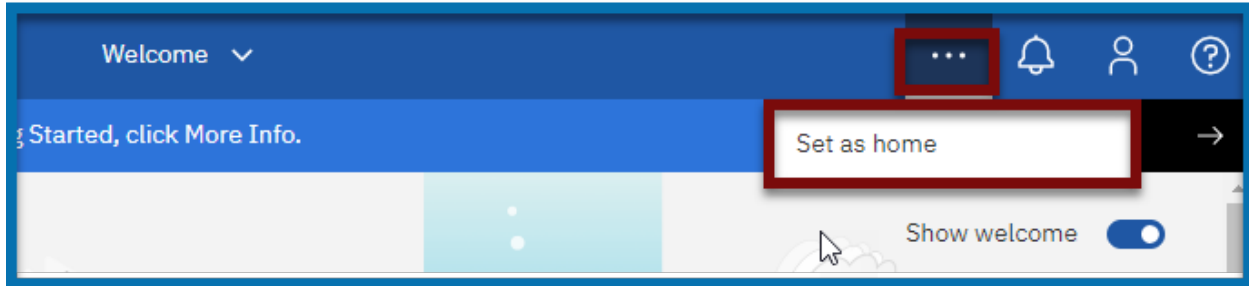
Welcome

Toggle between Welcome Page and Opened or New Reports



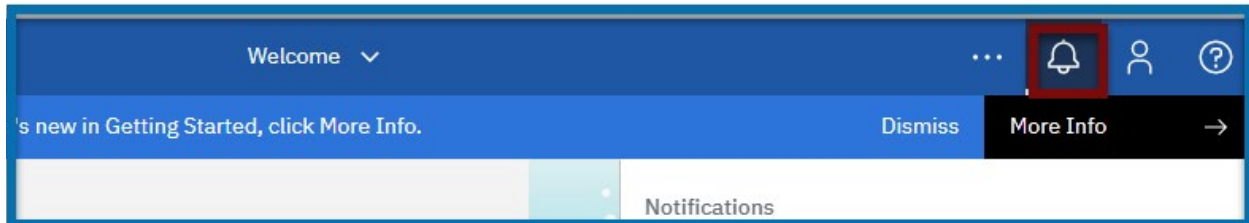
- House icon () indicates you are on the Home Page.
- Click () to close objects in the window.

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:



- Alerts user when subscribed reports have finished executing

Personal Menu

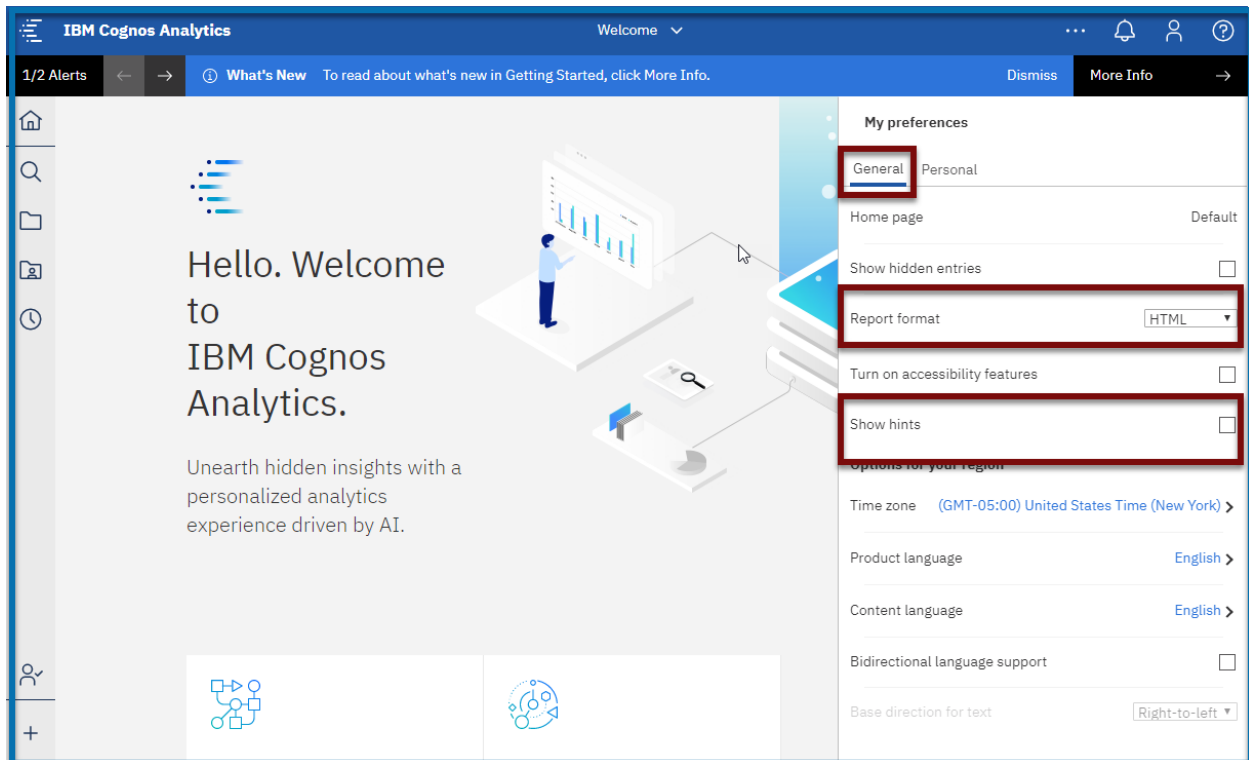
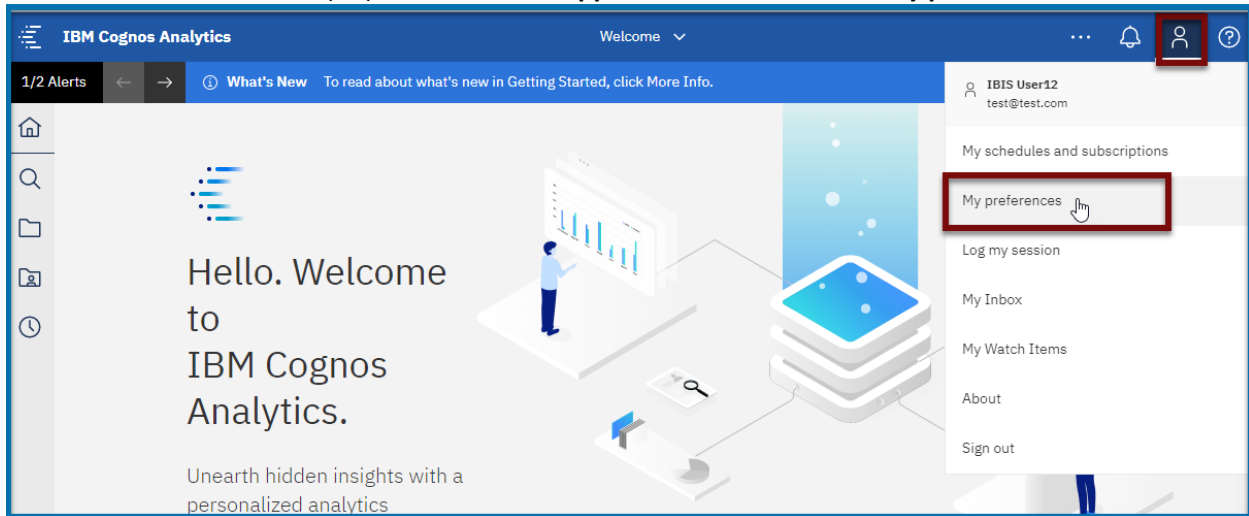
The personal menu is related to anything relating to you as a user. This includes your security settings and personal preference settings within the portal.



- 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** (👤) located on the **Application Bar** and select **My preferences**.

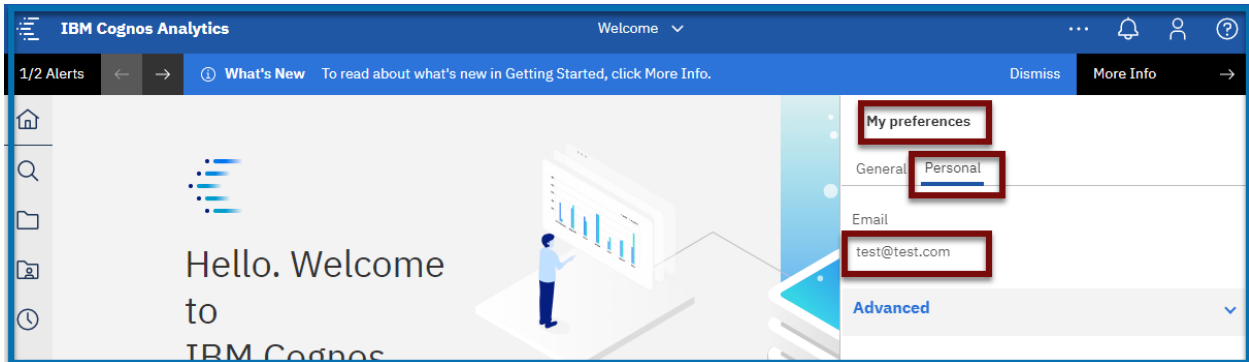


Report Format: Users can change all reports to run in a preselected mode, but this is not recommended. Default is HTML.

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.

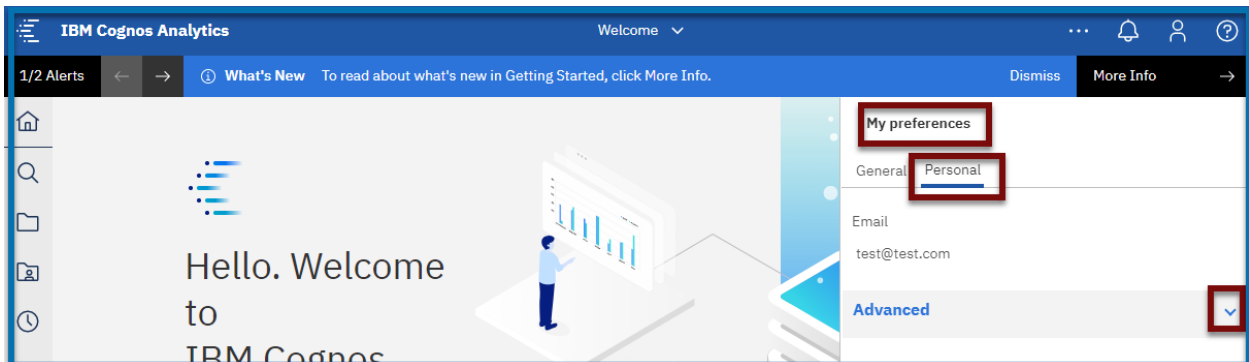
Additional settings are not typically changed

▪ Select the **Personal Tab**



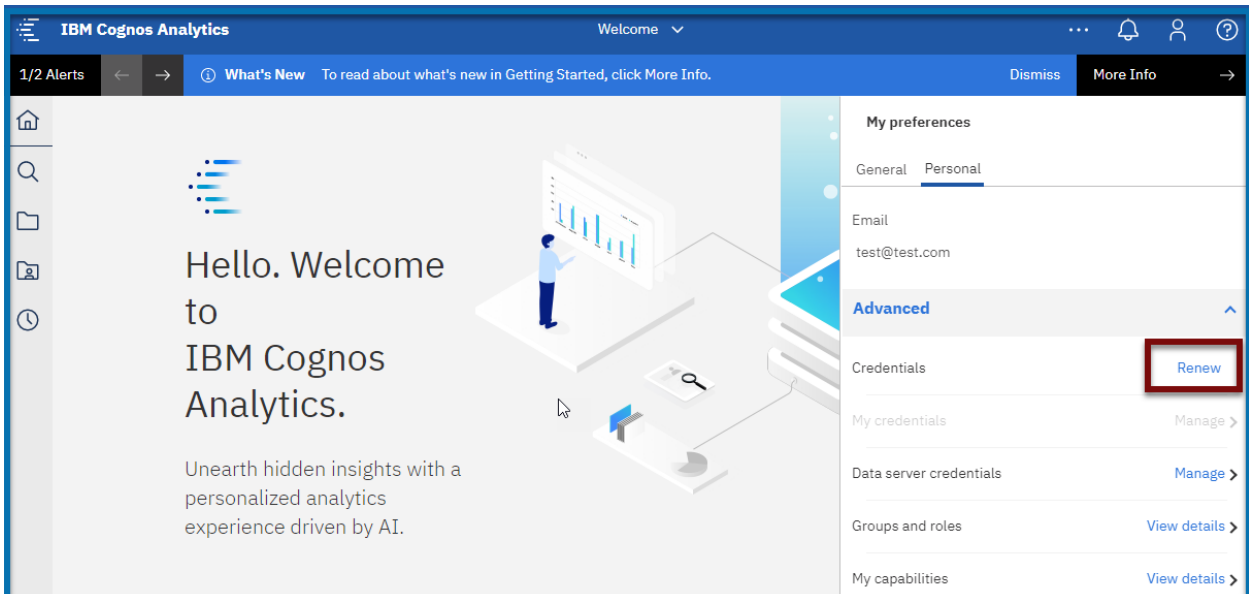
Make Sure you have the email account to be right and it is your office email Address

▪ Use the down arrow across from Advanced to open additional options.



* **Renew credentials** after changing your password for Subscriptions and Schedules can be found here

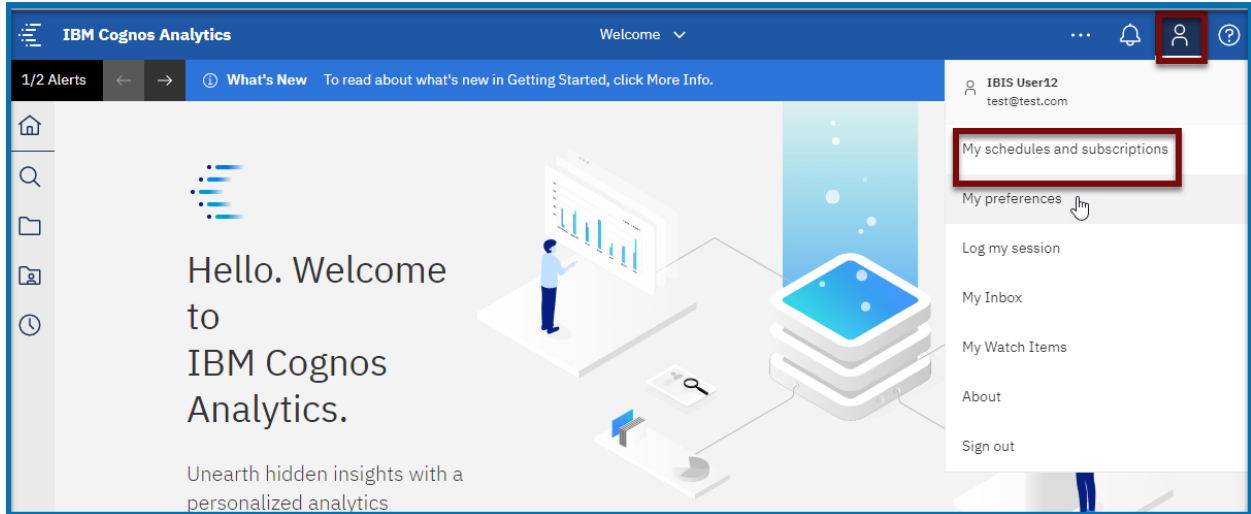
▪ Click Renew after password changes for Subscriptions and Schedules to continue running.



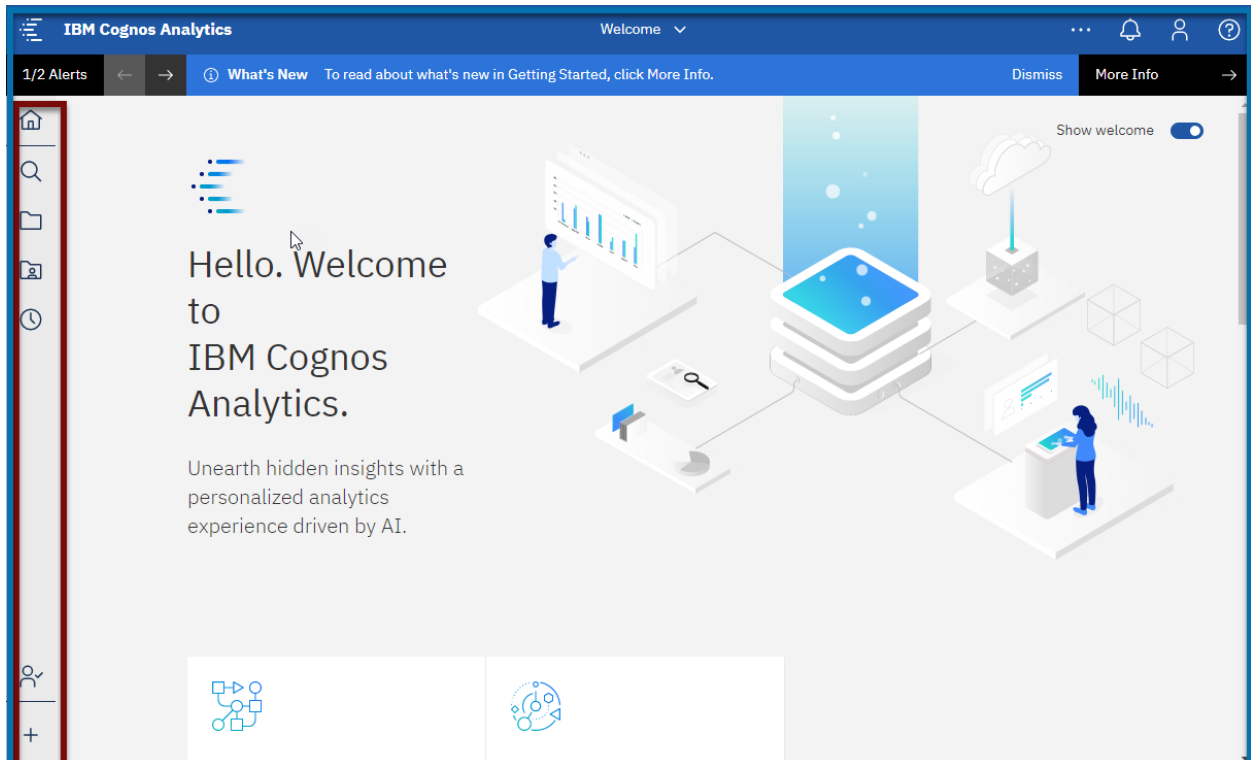
Additional settings under My preferences are not typically changed.

My schedules and subscriptions

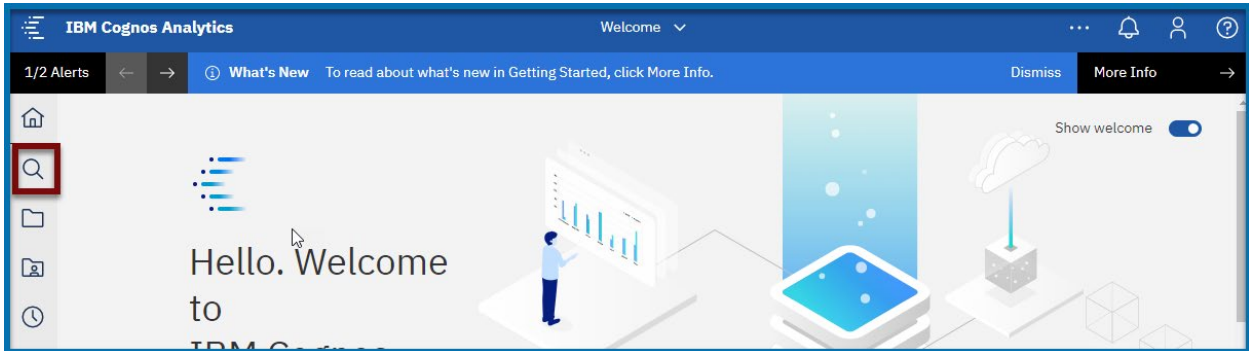
Users can subscribe to a report they use often or on a regular basis. When you subscribe to a report, the subscription includes all your prompt and parameter values. My schedules and subscriptions display user subscriptions as well as schedules. It can be used to research failed report schedules, delete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



Navigation Bar

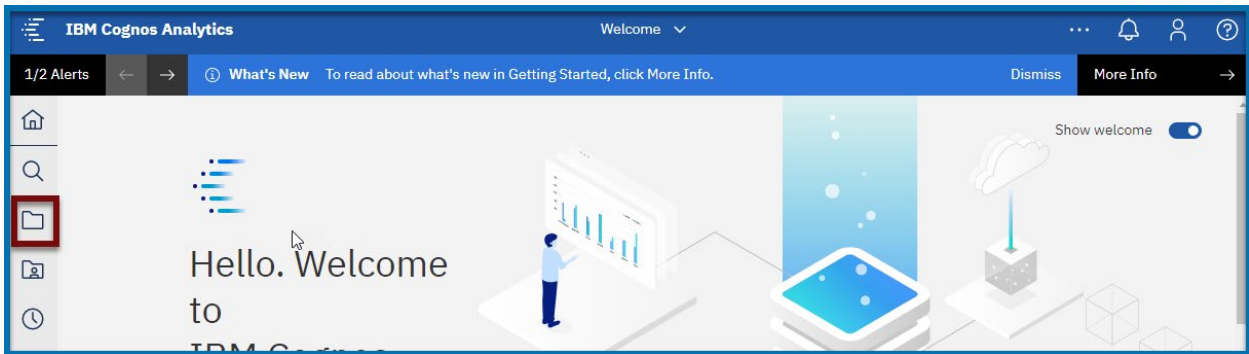


Search



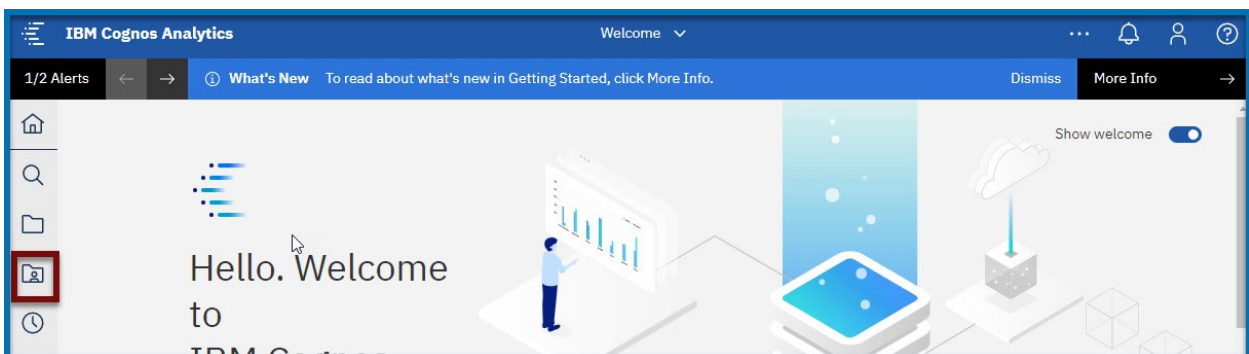
Search for items by keywords and select Enter key. Searches can be saved

My Content



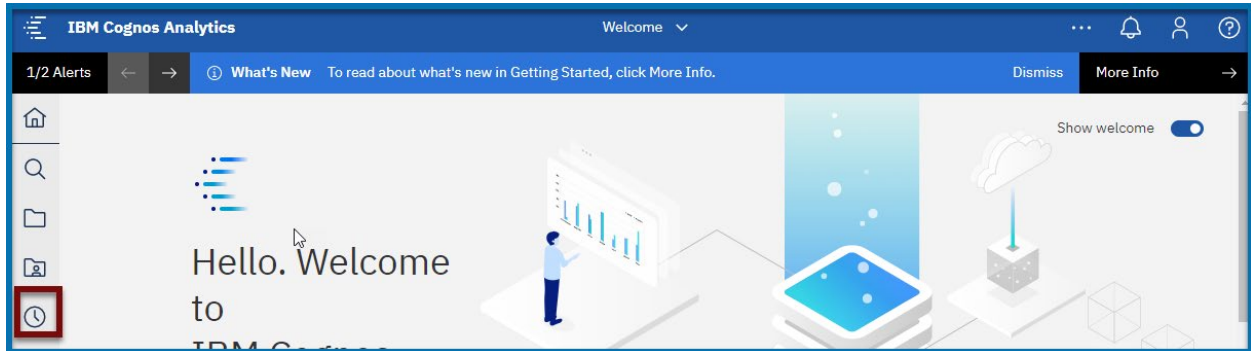
My Content folders (previously My Folders tab)

Team Content



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

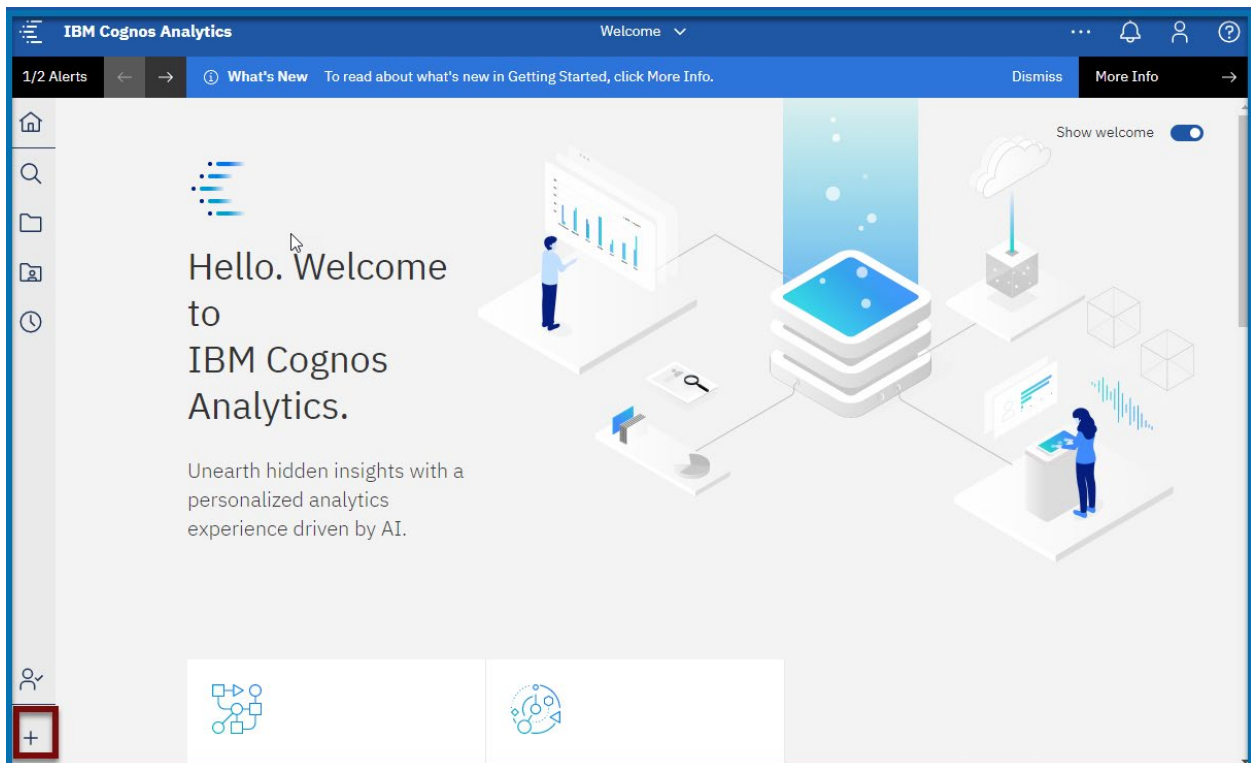
Recent



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).

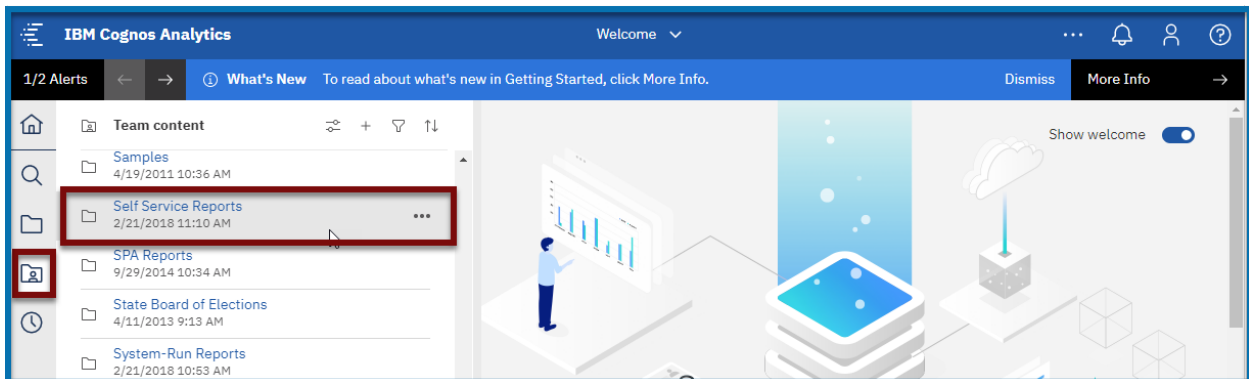
	
My Content	Team Content
<ul style="list-style-type: none"> Formerly My Folders Contains objects only viewable by user Users can copy reports from Team Content folders and save to My Content for personal use 	<ul style="list-style-type: none"> Formerly Public Folders Contains standard reports and departmental folders and reports Users view items based on security

Icons in My Content and Team Content

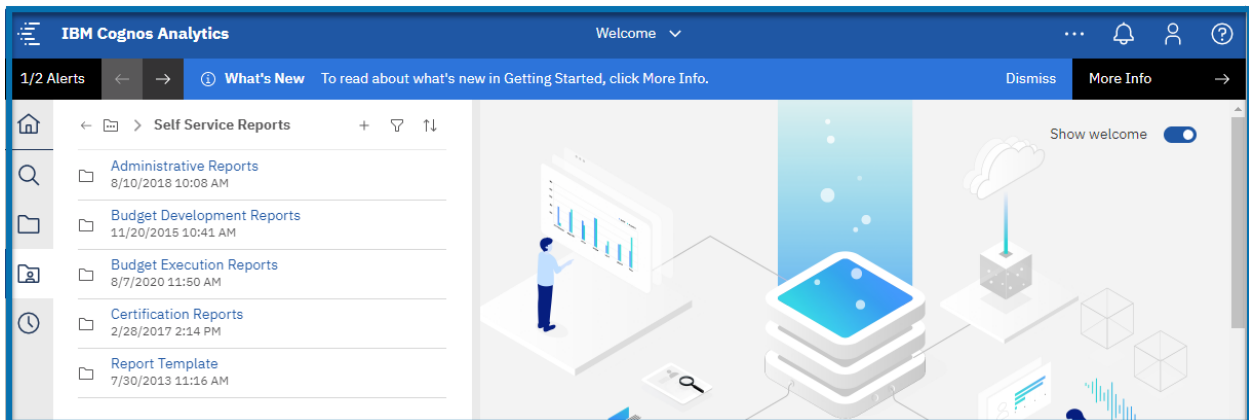
				
Folder	Package	Report View	Dashboard	Shortcut

Team Content (Formerly Public Folders)

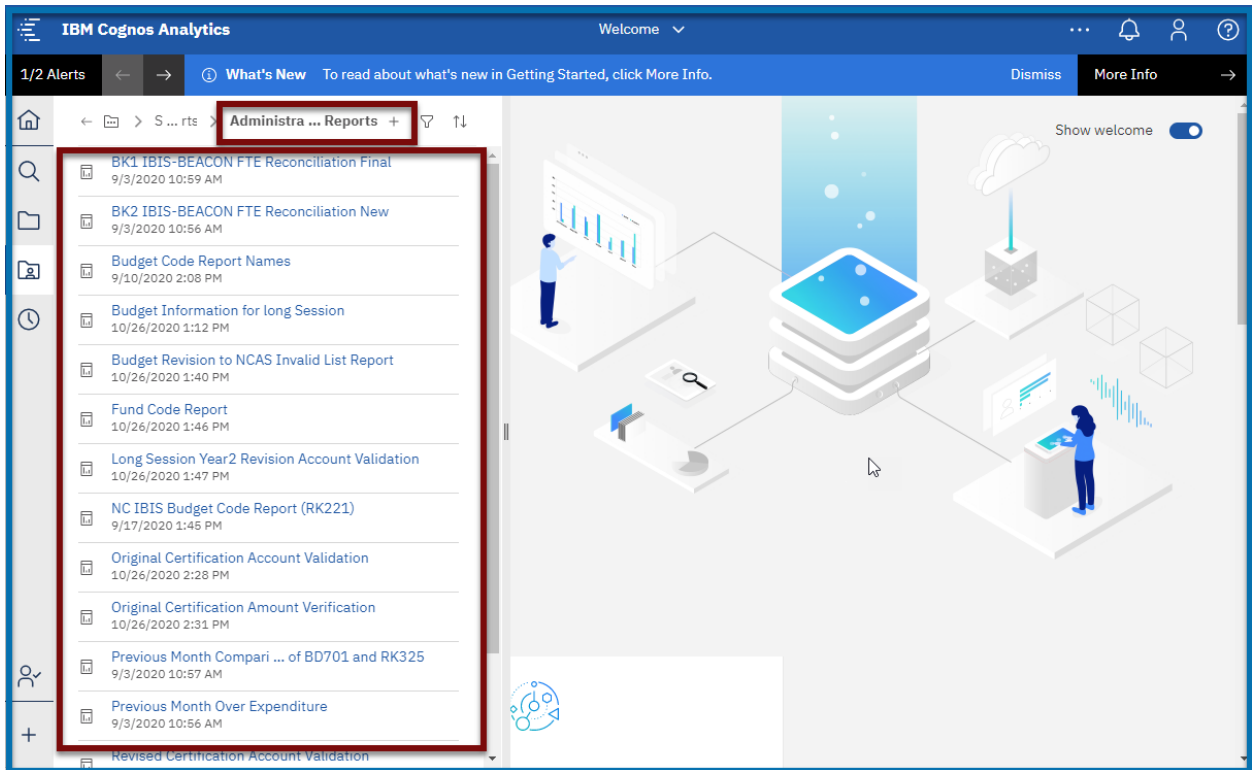
- Click on Team Content from Navigation pane to open a windowpane. The first pane generally contains folder icons. Clicking a folder name will open another pane.
- Click on the Self-Service Folder



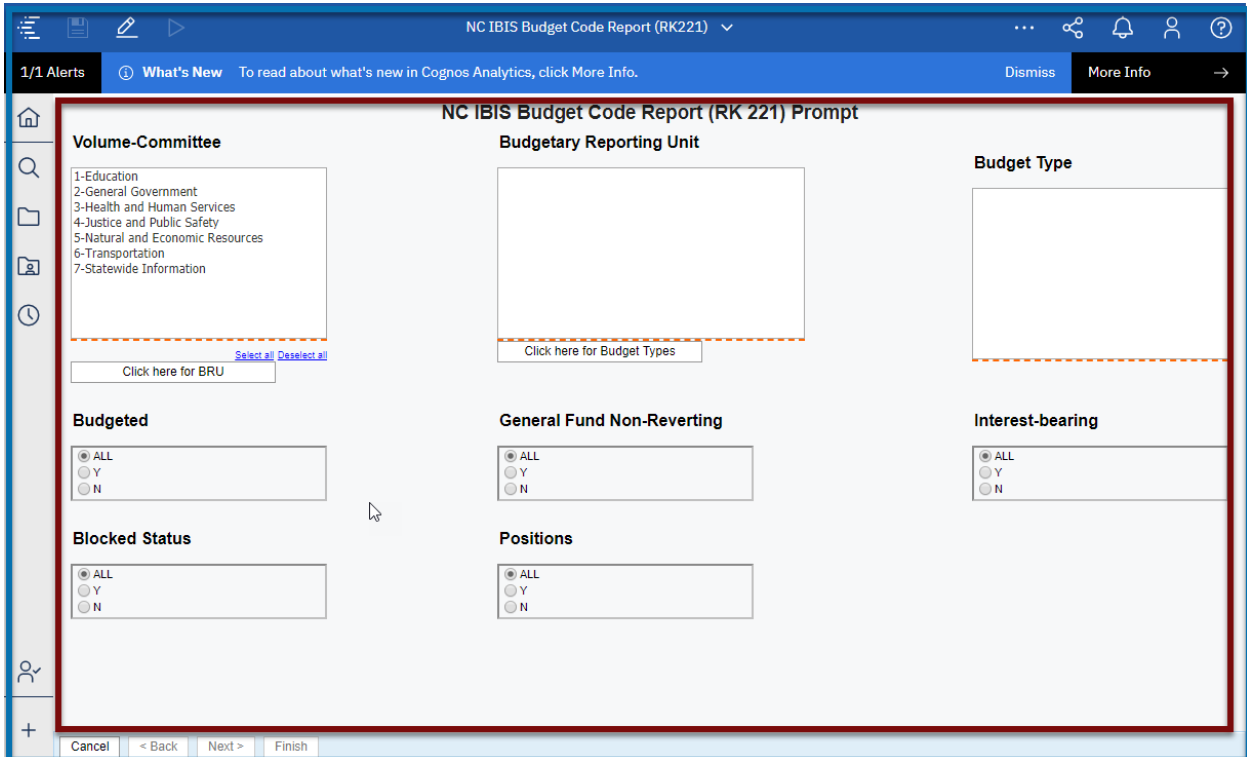
- Click on the Administrative Reports Folder



You will see all the reports under Administrative Reports Folder.



- Click on the NC IBIS Budget Code Report (RK221)



Select the prompts you want to execute the reports

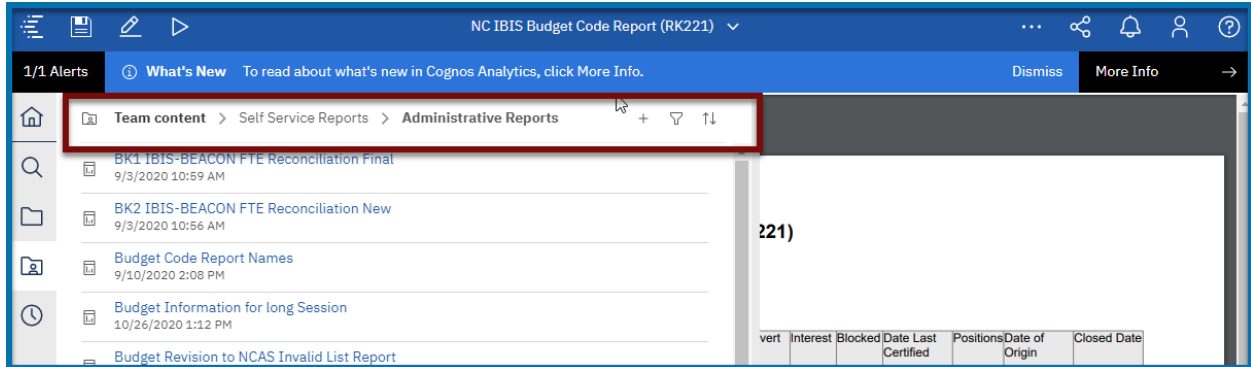
- Hit Finish at the bottom of the screen

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

NCAS Company	Budget Code	Budget Code-Long Title	Budget Code- Short Title	Multiple	NCAS Region	Budgeted	OSBM Analyst	Sort	Revert	Interest	Blocked	Date Last Certified	Positions	Date of Origin	Closed Date
0311	13004	State Budget and Management - Reserve for Special Appropriations	State Budget and Management - Reserve for Special Appropriations	N	P	N	xyz	29000	N	N	N	12/13/1999	Y	07/01/1970	12/31/9999
	13005	State Budget and Management - General Fund	OSBM - General	N	P	Y	xyz	10000	N	N	N	12/13/1999	Y	07/01/1970	12/31/9999
	13007	State Budget and Management - General Fund	State Budget and Management - General Fund	N	P	N	xyz	60000	N	N	N	12/13/1999	Y	07/01/1970	12/31/9999
	13017	State Budget and Management - Disaster Relief	OSBM - Disaster Relief	N	P	N	xyz	29000	N	N	N	12/13/1999	Y	07/01/1970	12/31/9999
0321	13006	State Budget and Management - Surveying and Mapping - General Fund	OSBM - Surveying and Mapping - General Fund	N	P	N	xyz	29000	N	N	N	12/13/1999	Y	07/01/1970	12/31/9999
0331	13085	State Budget and Management - Reserve for General Assembly Appropriation	OSBM - Reserve for General Assembly Appropriation	N	P	Y	xyz	11000	N	N	N	12/13/1999	Y	07/01/1970	12/31/9999

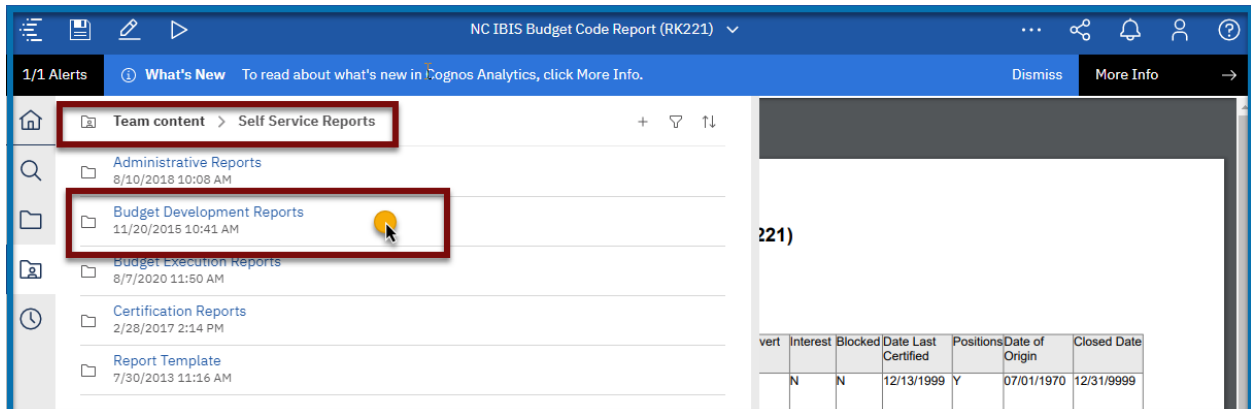
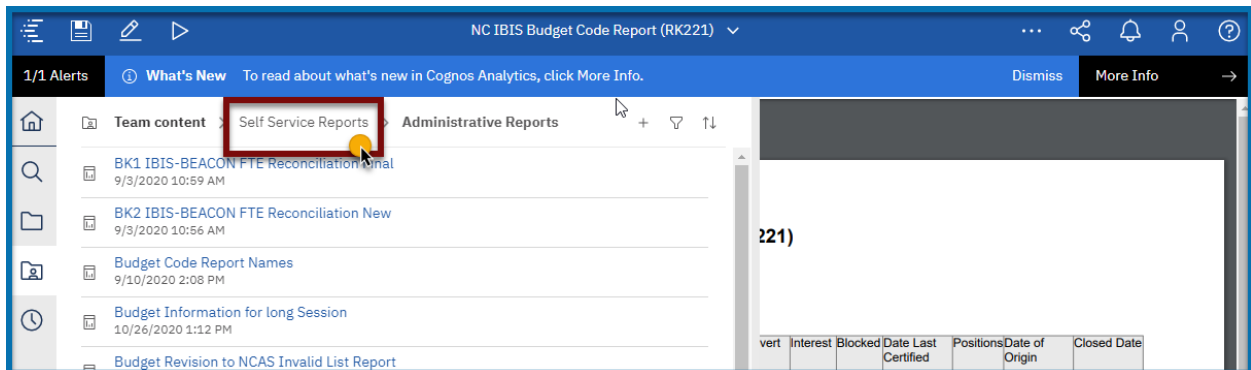
Breadcrumb Trail

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.”

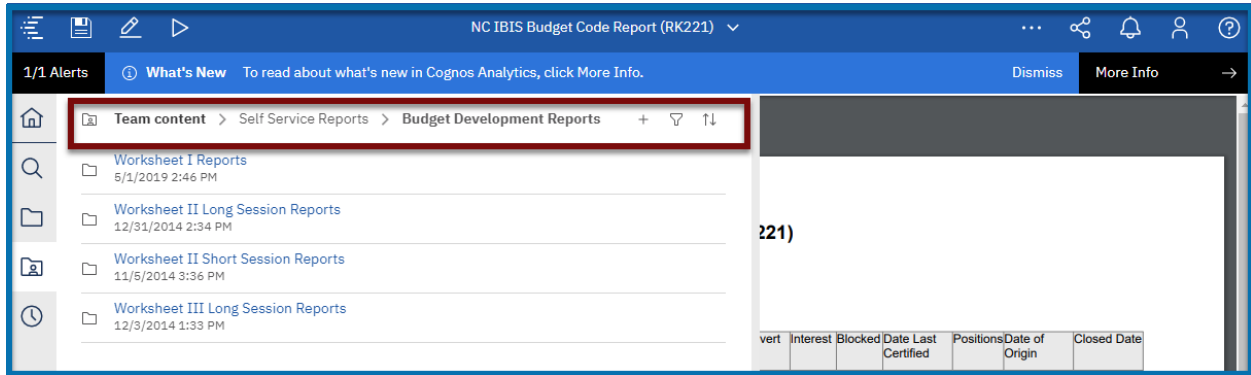


Navigate to Self Service Reports and Budget Development Folder

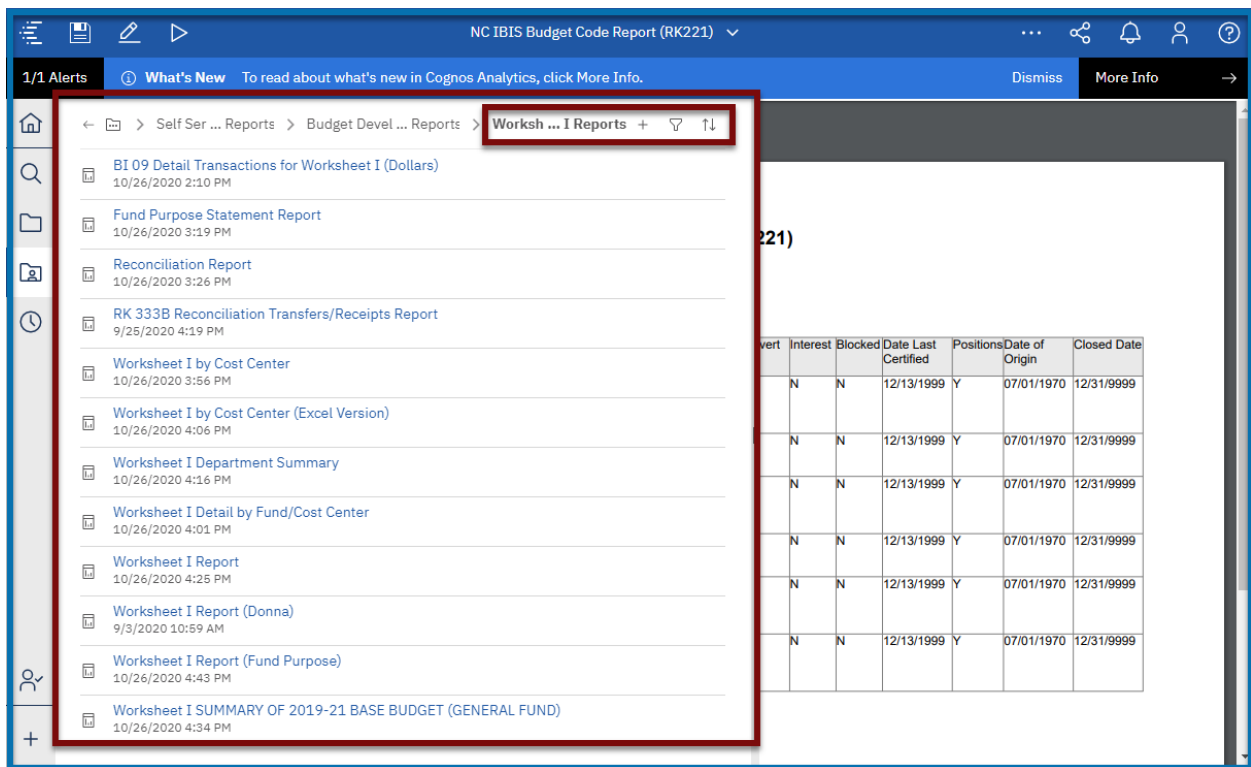
- Click on the **Self Service Reports** folder located in the Breadcrumb trail and click on the Budget Development Folder



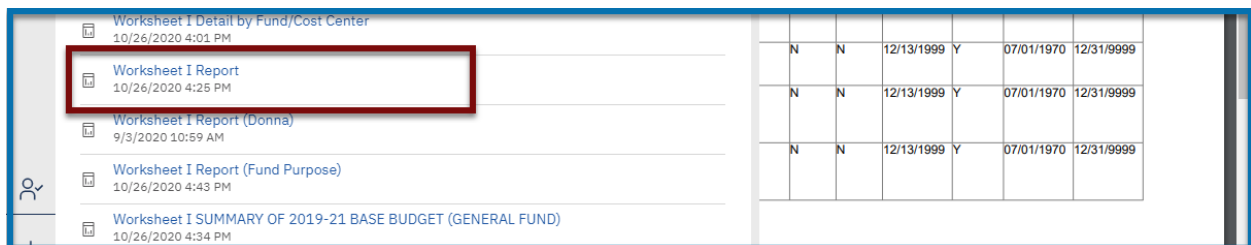
You will see all the Sub Folders in Budget Development Folder



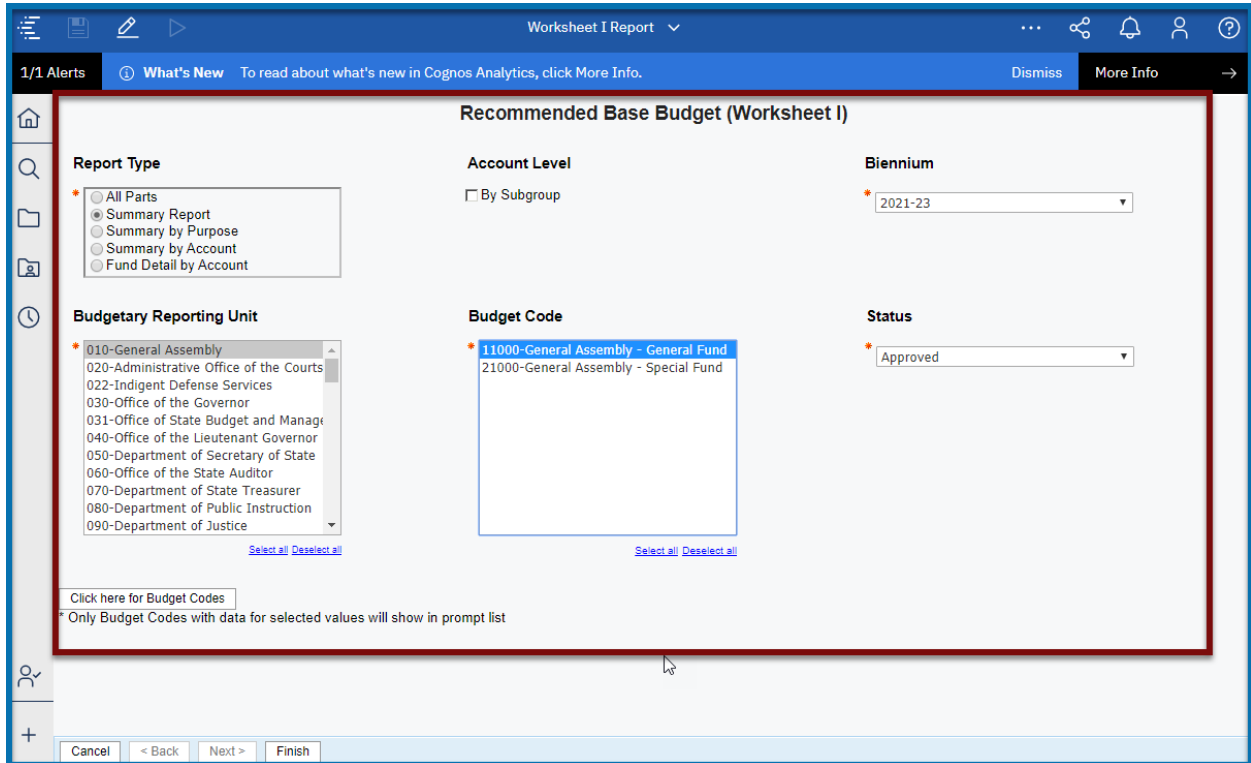
- Click on Worksheet I Reports Folder. Now you will see all the reports in Budget Development Folder.



- Click on Worksheet I Report



- Select the Report prompts that you want to execute



- Click on Finish

Recommended Base Budget (Worksheet I)
Summary Report
 Biennium : 2021-23
 Status : Approved

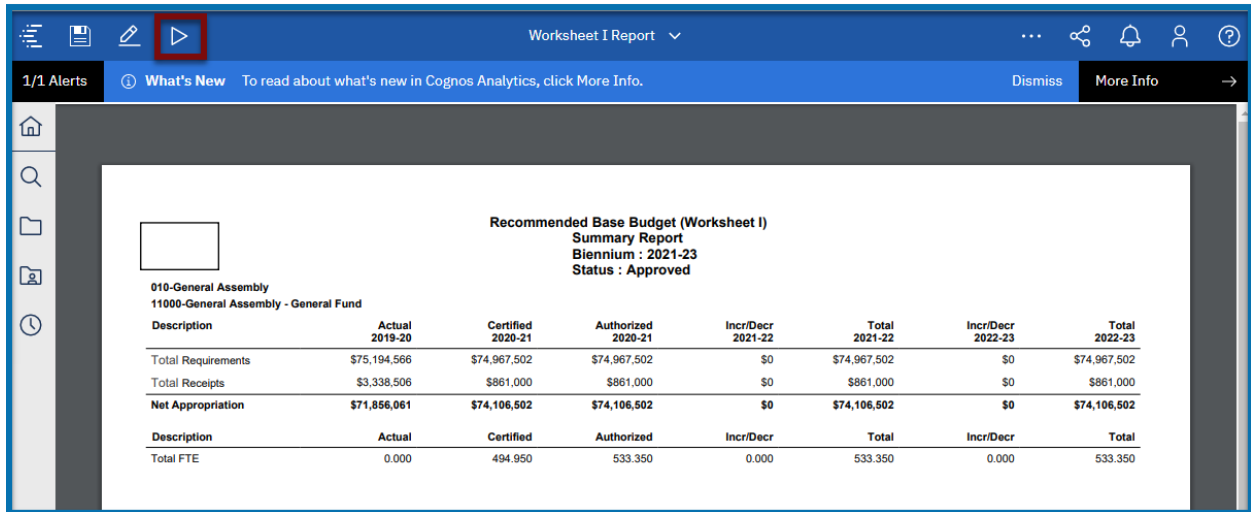
010-General Assembly
 11000-General Assembly - General Fund

Description	Actual 2019-20	Certified 2020-21	Authorized 2020-21	Incr/Decr 2021-22	Total 2021-22	Incr/Decr 2022-23	Total 2022-23
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

How to Rerun the report with different Prompt Values

- Click on Run as on the Application Bar



Worksheet I Report

1/1 Alerts What's New To read about what's new in Cognos Analytics, click More Info. Dismiss More Info

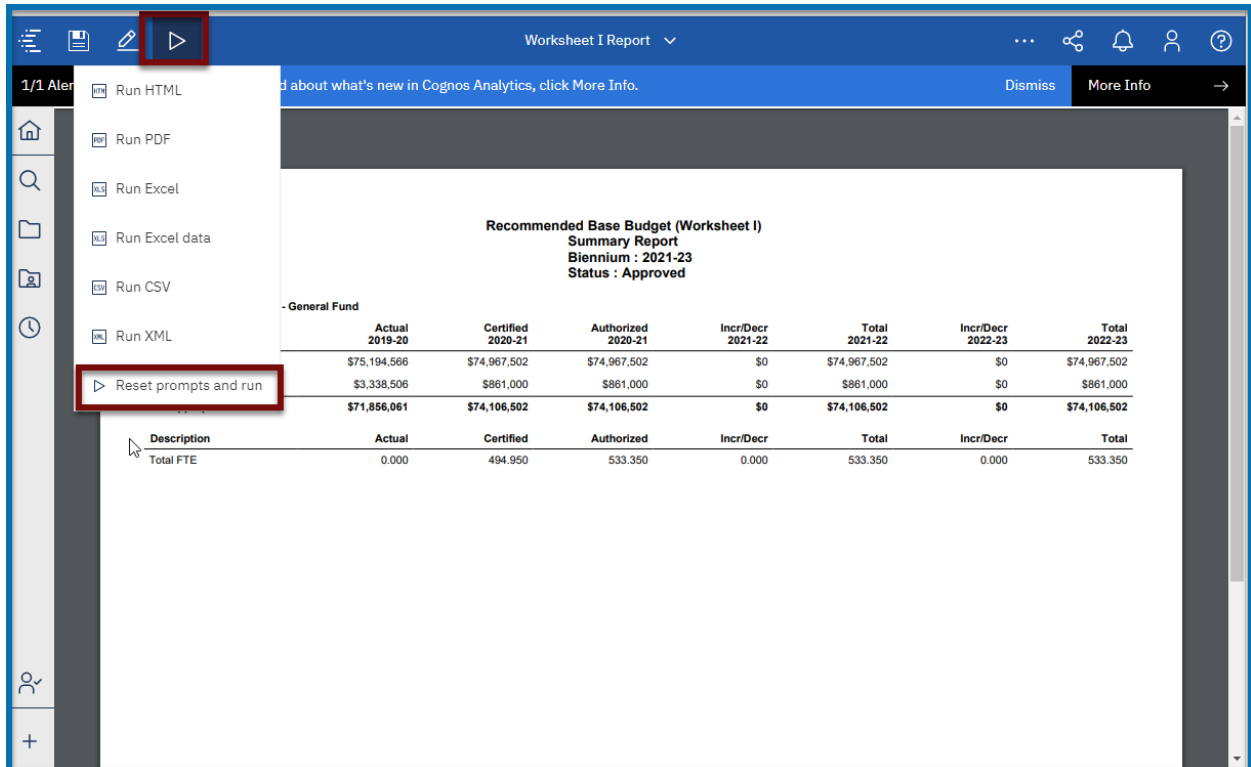
Recommended Base Budget (Worksheet I)
Summary Report
Biennium : 2021-23
Status : Approved

010-General Assembly
 11000-General Assembly - General Fund

Description	Actual 2019-20	Certified 2020-21	Authorized 2020-21	Incr/Decr 2021-22	Total 2021-22	Incr/Decr 2022-23	Total 2022-23
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

- Click on Reset prompts and run



Worksheet I Report

1/1 Alerts Run HTML To read about what's new in Cognos Analytics, click More Info. Dismiss More Info

Run PDF

Run Excel

Run Excel data

Run CSV

Run XML

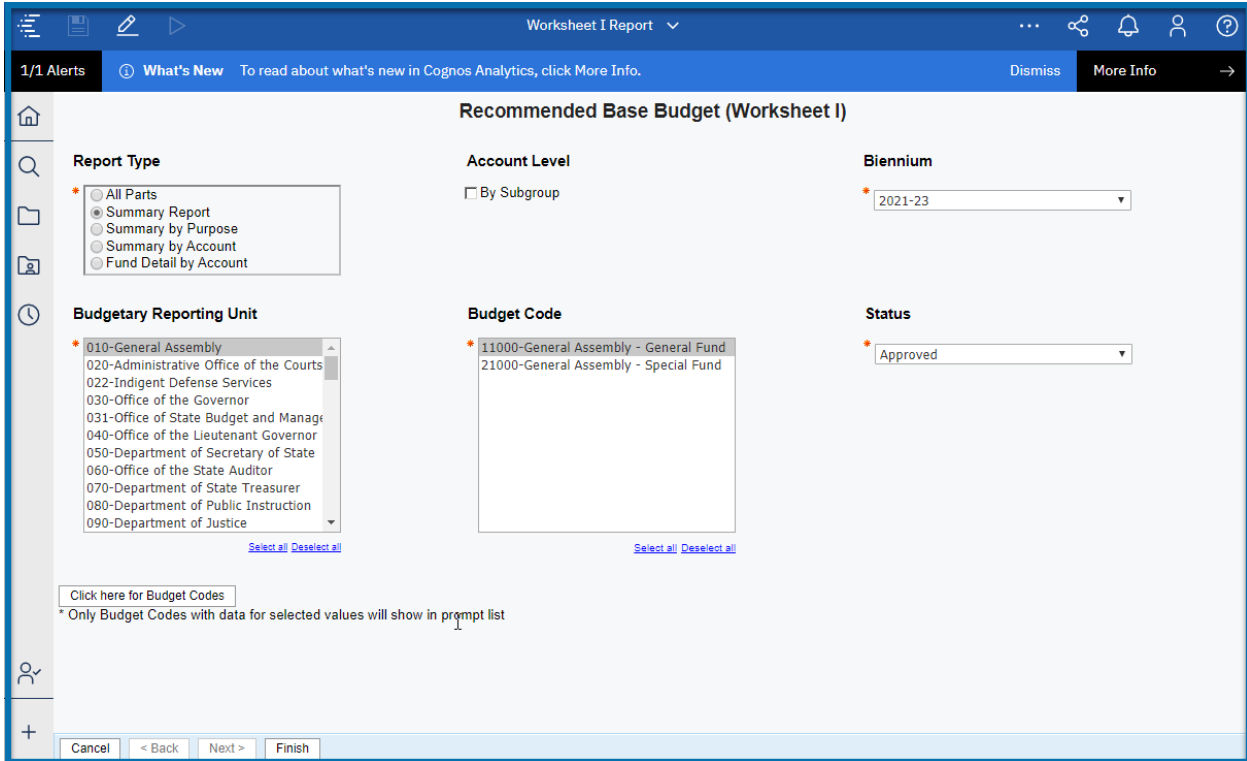
▶ Reset prompts and run

Recommended Base Budget (Worksheet I)
Summary Report
Biennium : 2021-23
Status : Approved

-General Fund

Description	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
	\$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

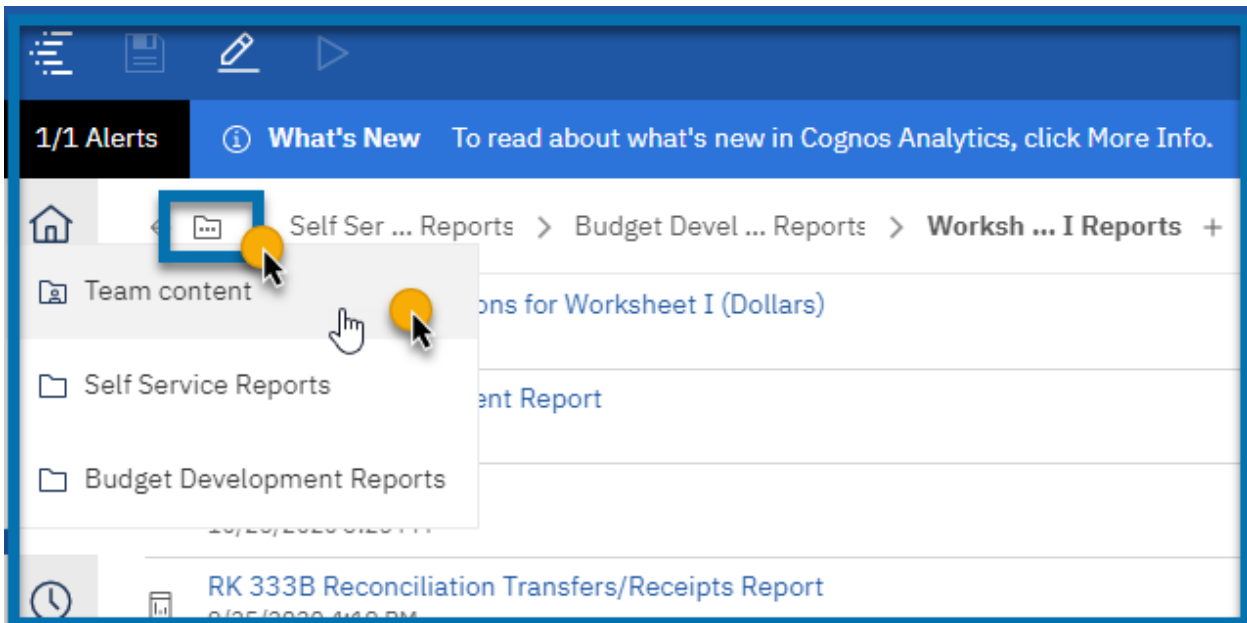
Description	Actual	Certified	Authorized	Incr/Decr	Total	Incr/Decr	Total
Total FTE	0.000	494.950	533.350	0.000	533.350	0.000	533.350



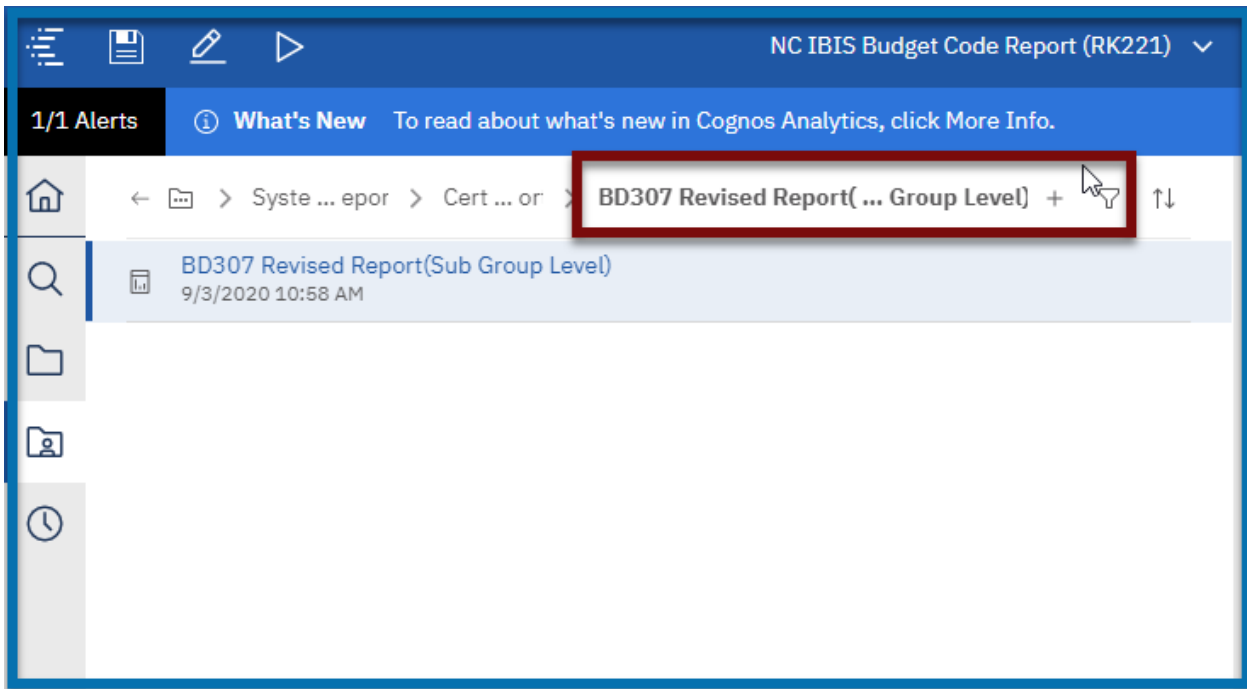
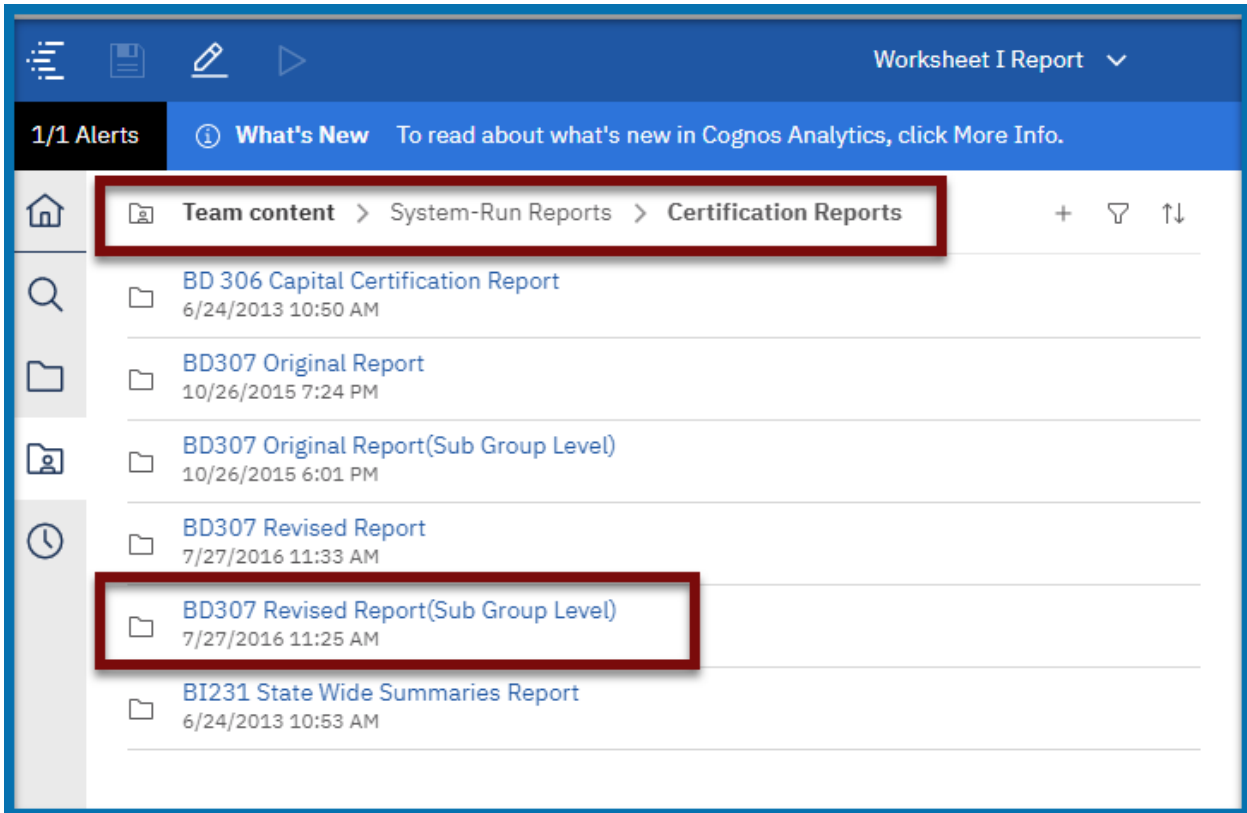
You choose the desired prompts you want it and run the report.

How to Access the System Run Reports

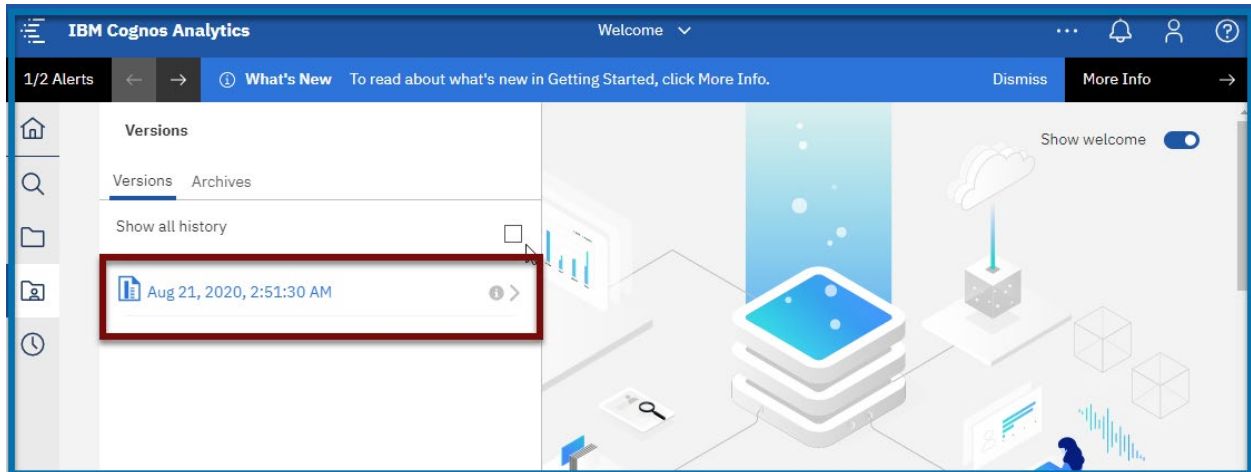
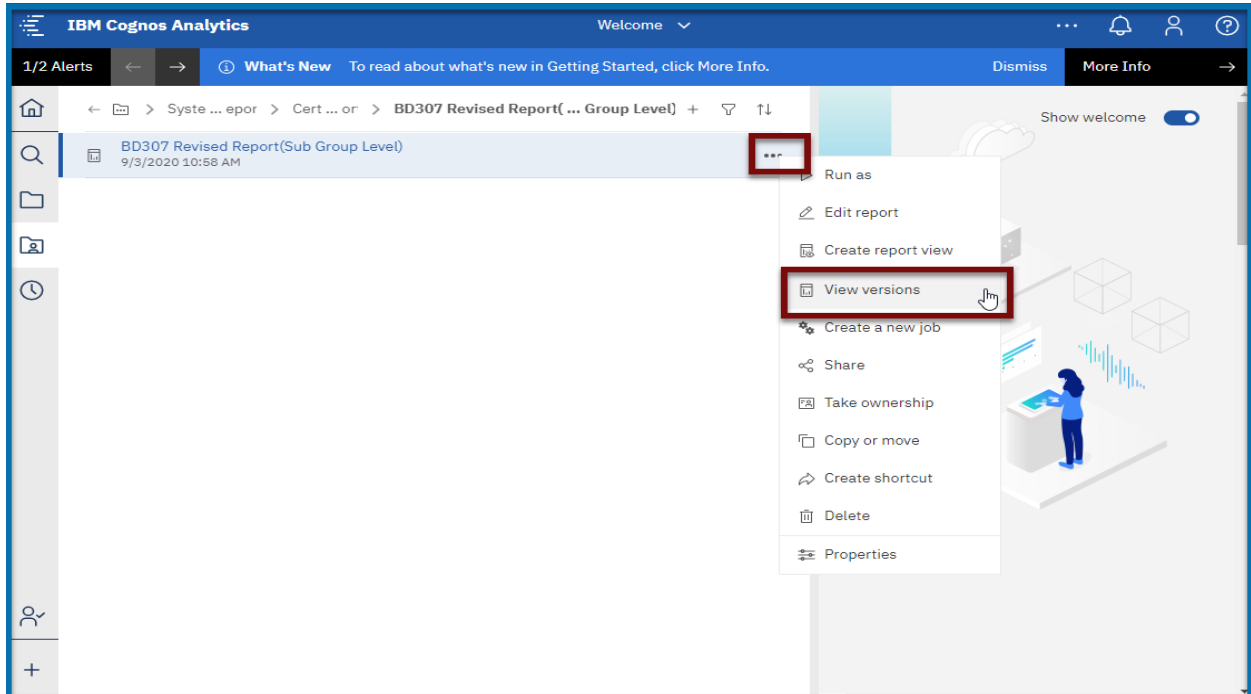
- Click on the Team Content on the Navigation Bar
- Click Collapse Item on the Windows Pane



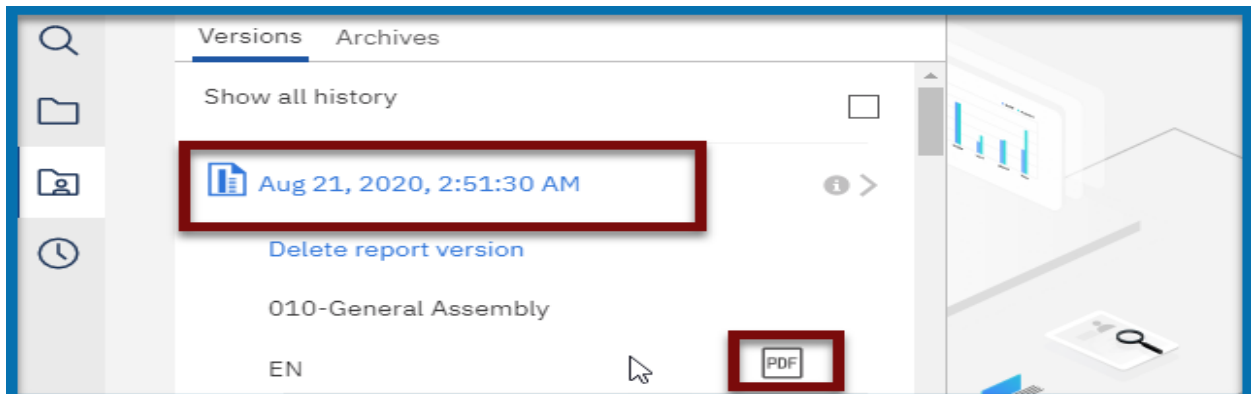
- Select System Run Reports Folder and select Certification Reports Folder and select BD307 Revised Report (Sub Group Level)



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

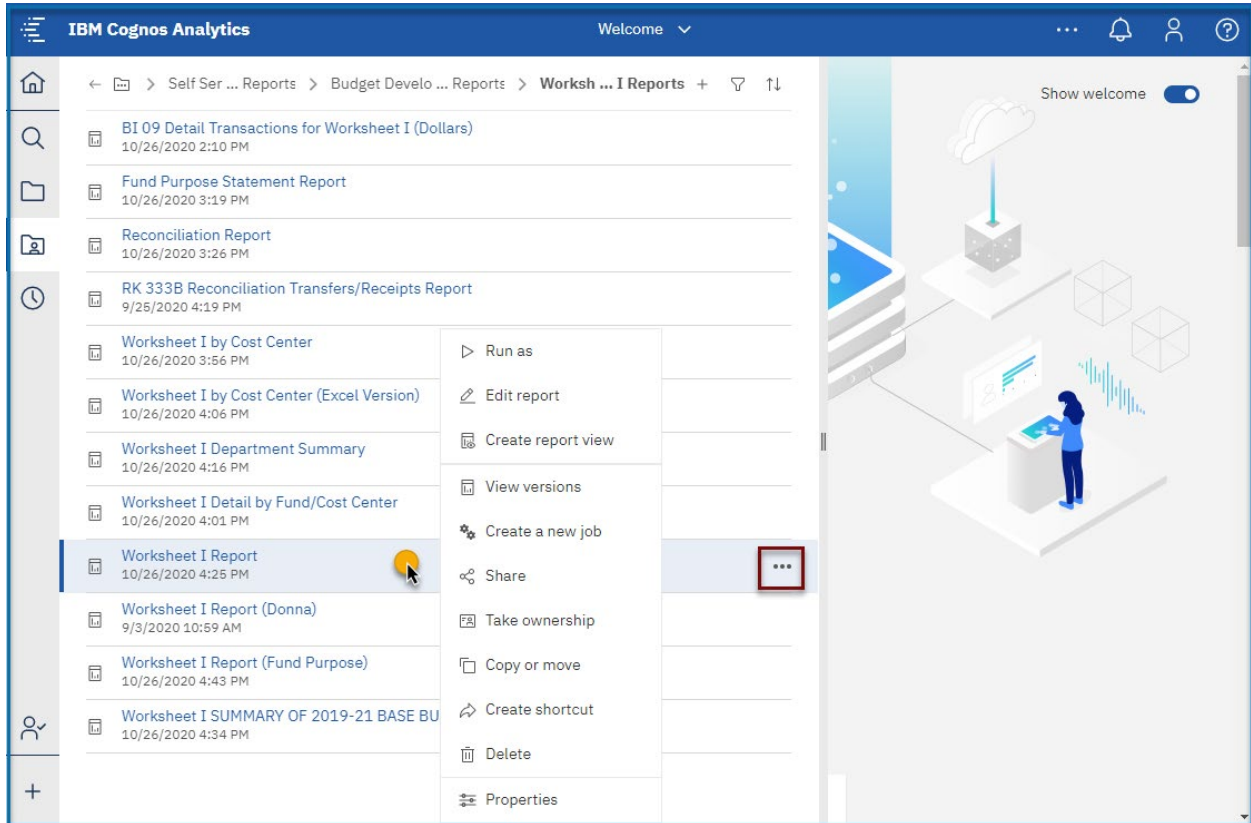


- Click on Version that are shown under the version, You will see the scheduled output. Click on the PDF






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.

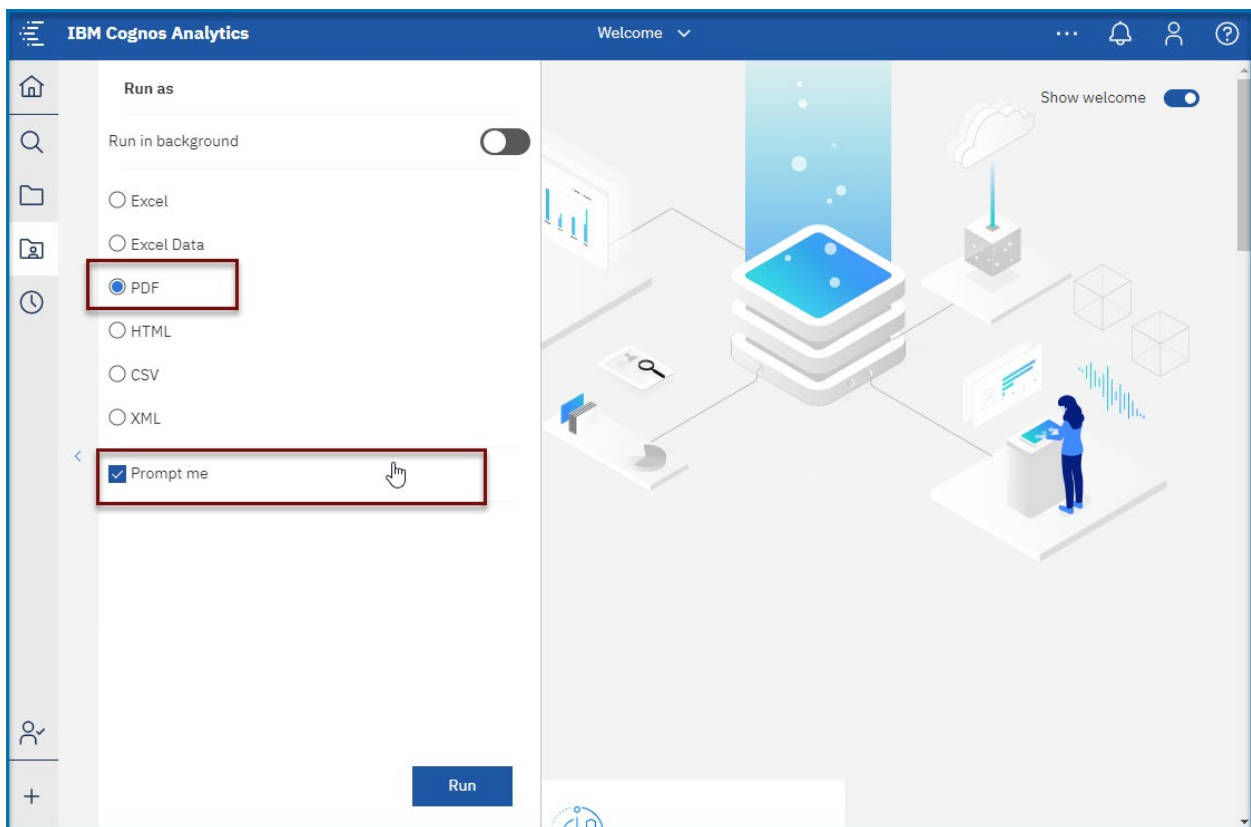


Run as	Allows selection of report output type and Run in background mode
Edit report	Opens report in authoring tool for edits and changes
Create report view	Creates a report view, usually used to create a copy for scheduling
View versions	Displays any previously saved report output and previous run history
Create a new job	Ability to create a job
Share	Copy link to share content with other users
Take ownership	Used to update logged in user to become report owner
Copy or move	Copy report object to another destination in Cognos. Must have write access to selected destination.

 Create shortcut	Used to create a shortcut version of the report. Not generally recommended.
 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.

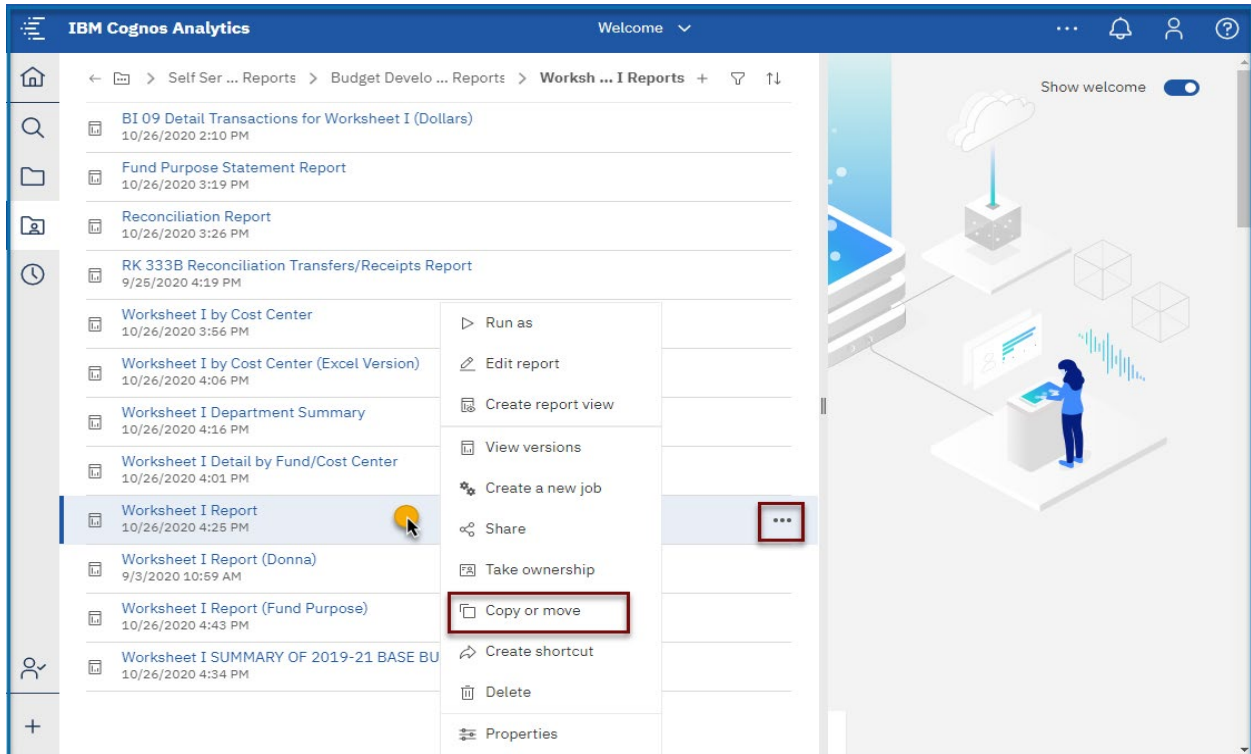
- Click on Run as ( Run as) option.
- Choose the Format you want to run. I choose the PDF option to run and Choose Prompt me to get to the Prompt Page.



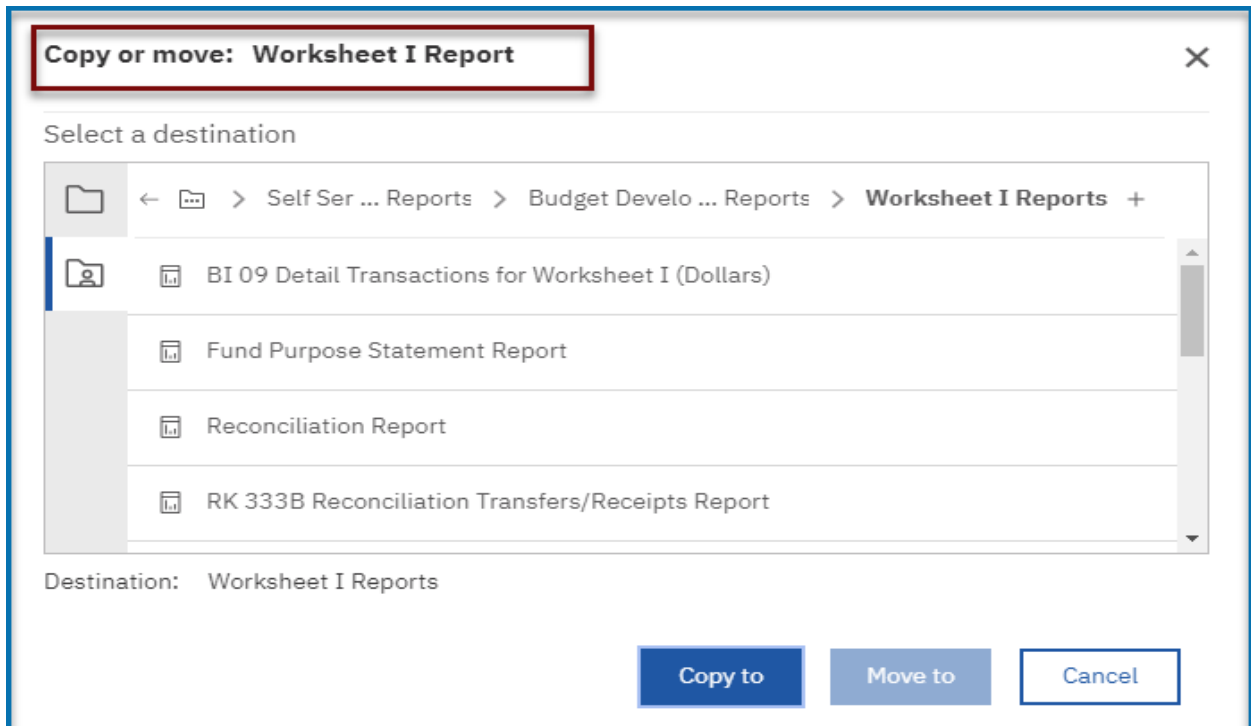
- Hit Run at the Bottom of the screen

Copying and Running the Report in the Background

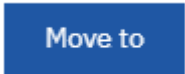
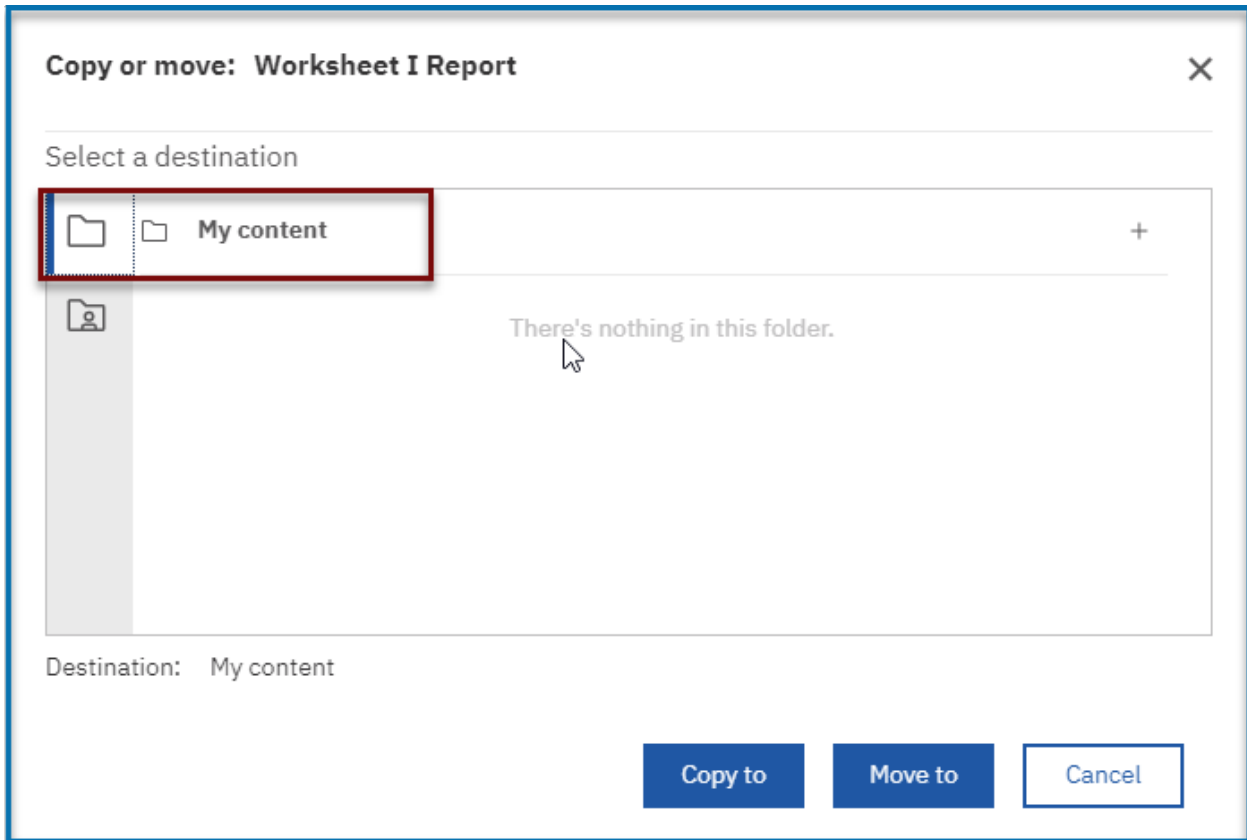
- Right-click on Worksheet I report OR click the ellipsis to the right of the report name. Notice the row is highlighted and an options menu appears and Click on **Copy or Move**



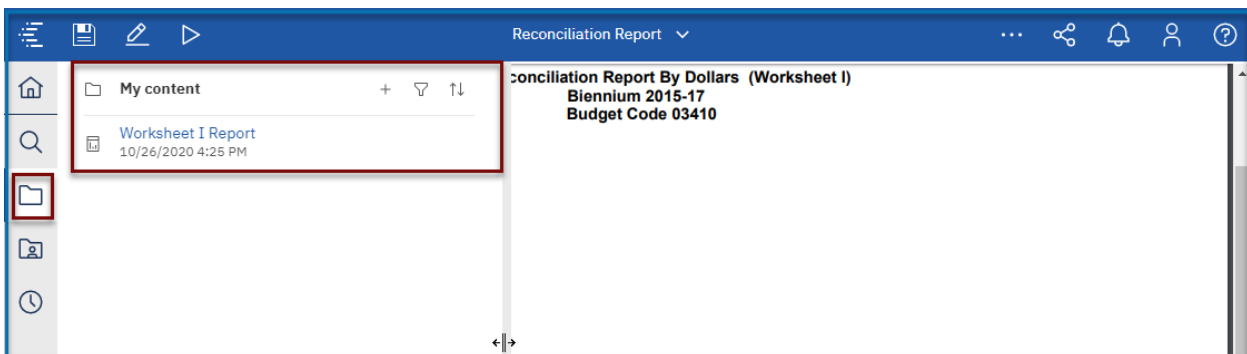
Always move the Report to the My Content Folder



- Select My Content

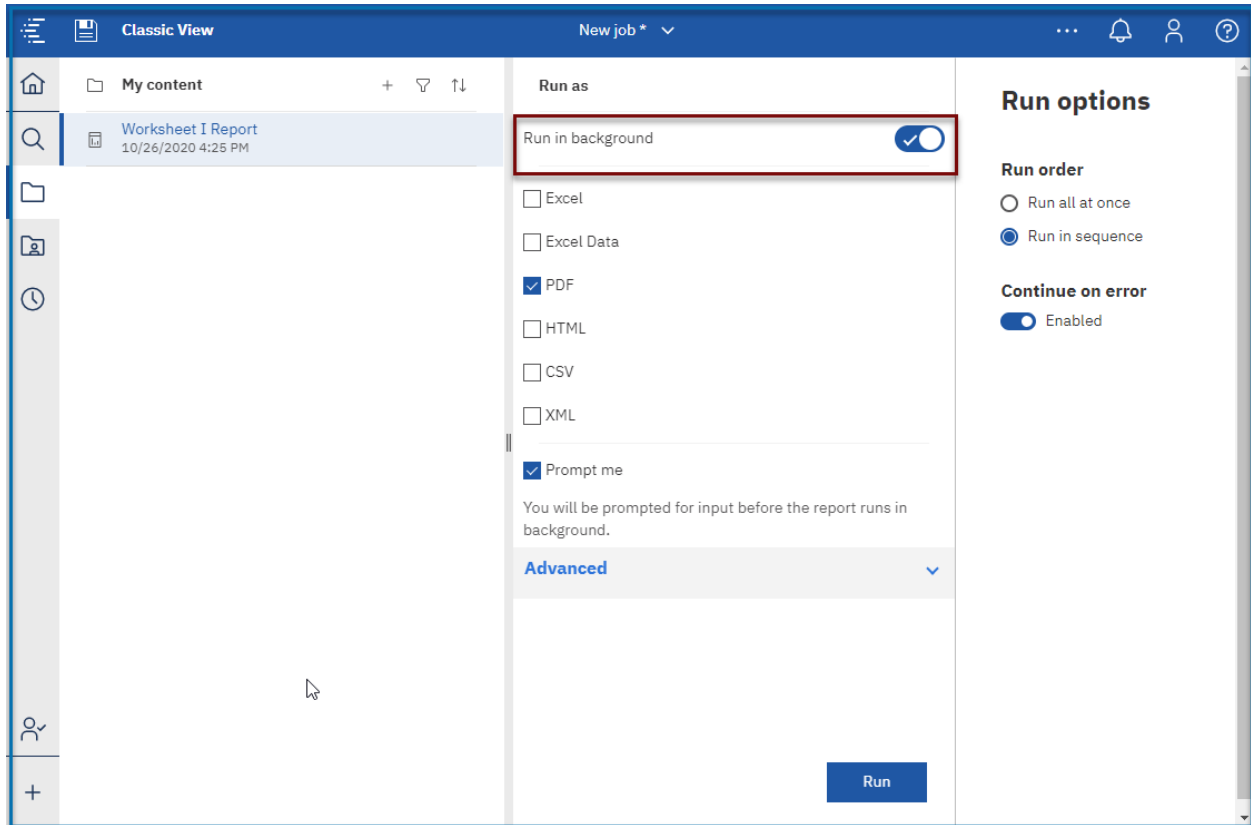


- Click on Move to () and you will see the report in My Content
- Click on My Content and you will see the report (Here in our case it Worksheet I Report)

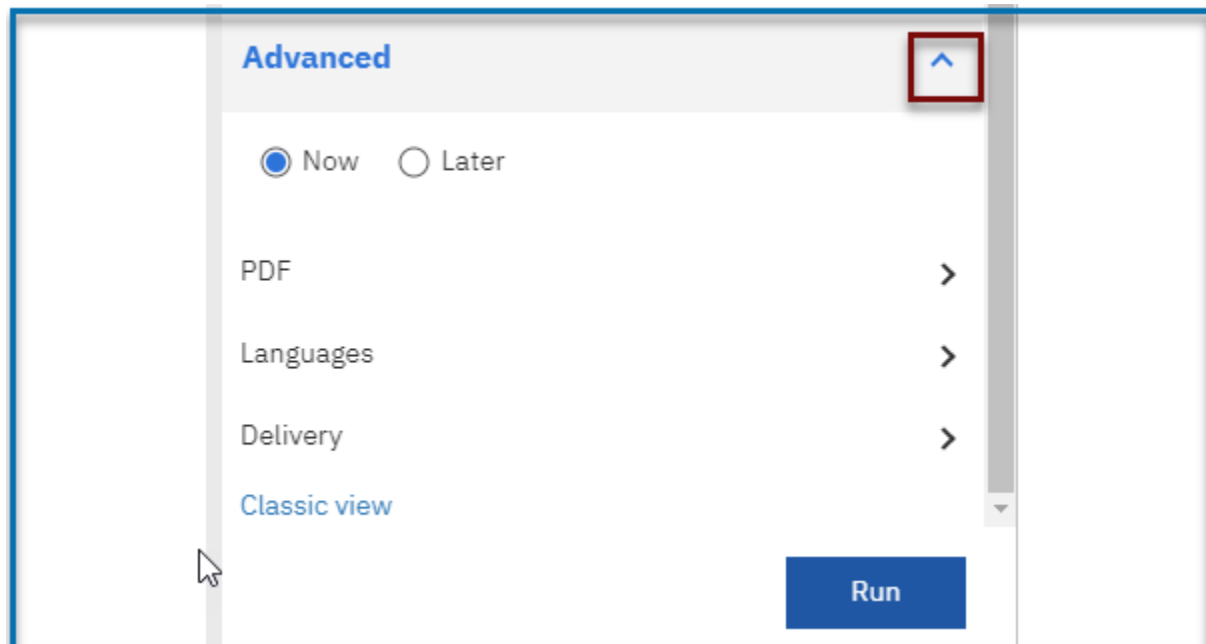


Running the Report in the Background

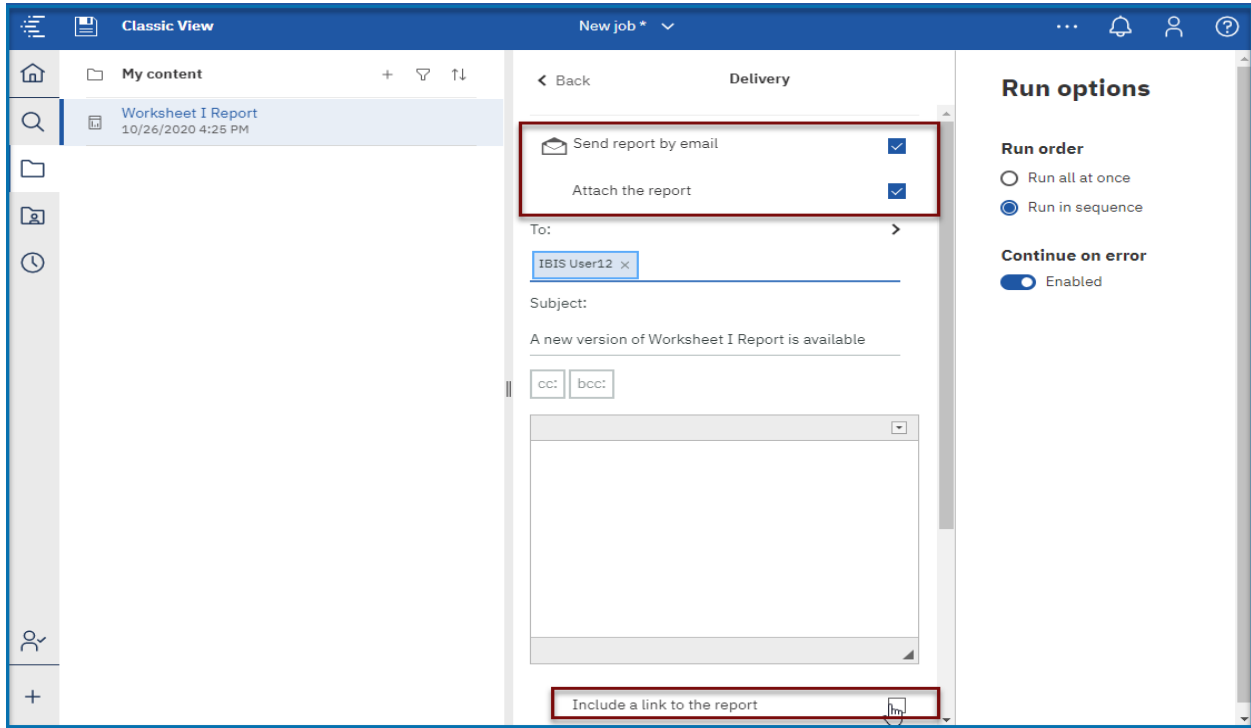
- Right-click on Worksheet I report OR click the ellipsis to the right of the report name. Notice the row is highlighted and an options menu appears and Click on **Run As and Choose Run in the Back Ground**



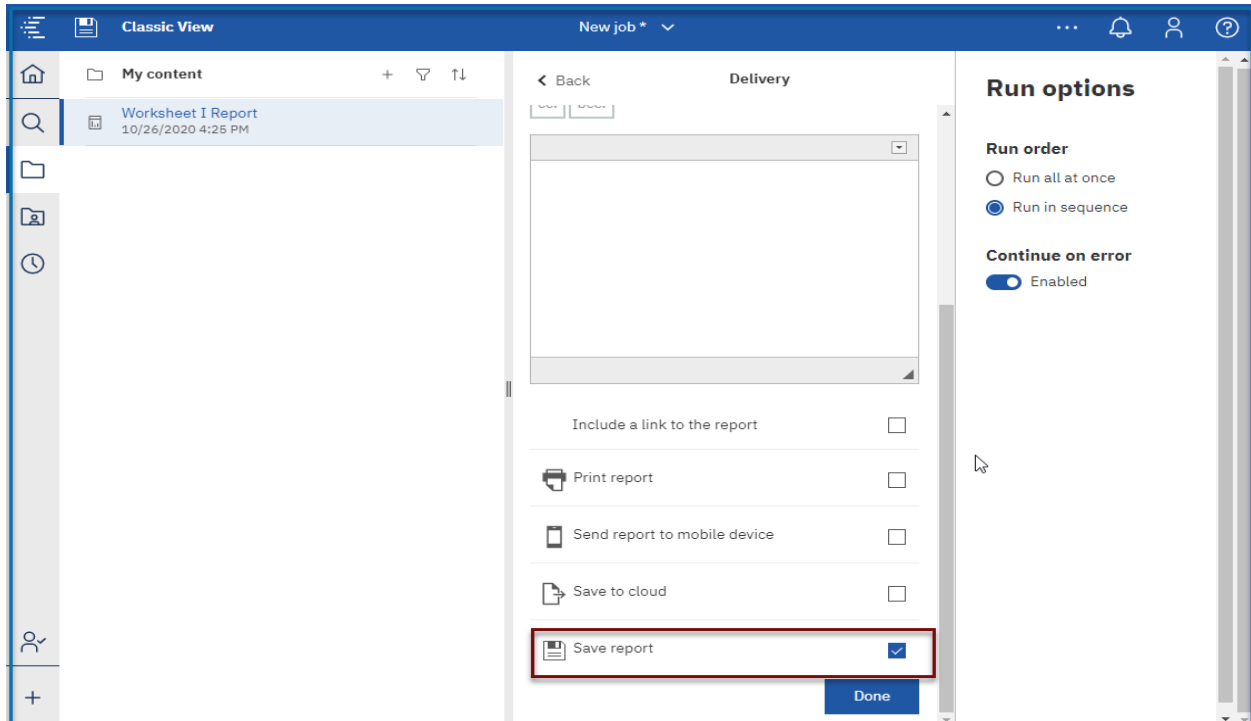
- Expand Advance



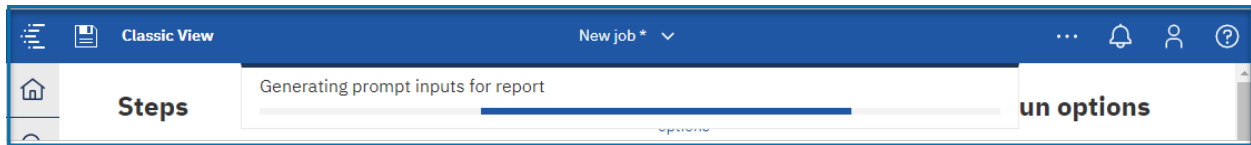
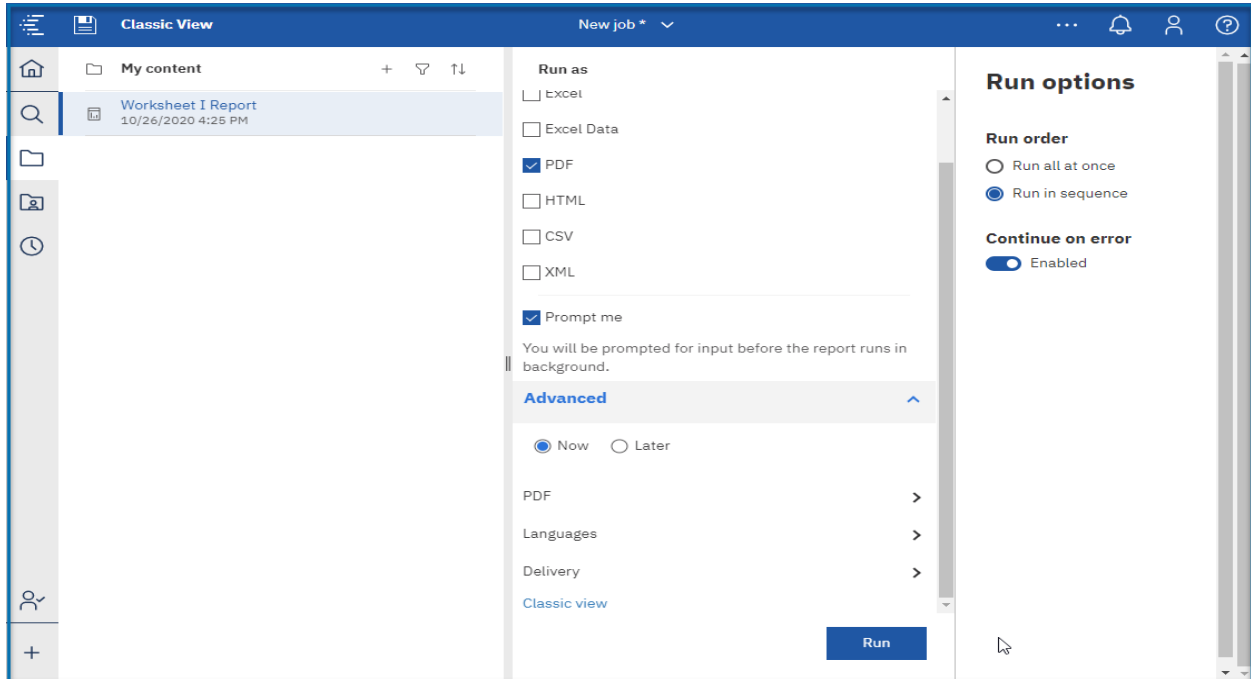
- Expand Delivery
- Choose the Report by Email
- Attach the report



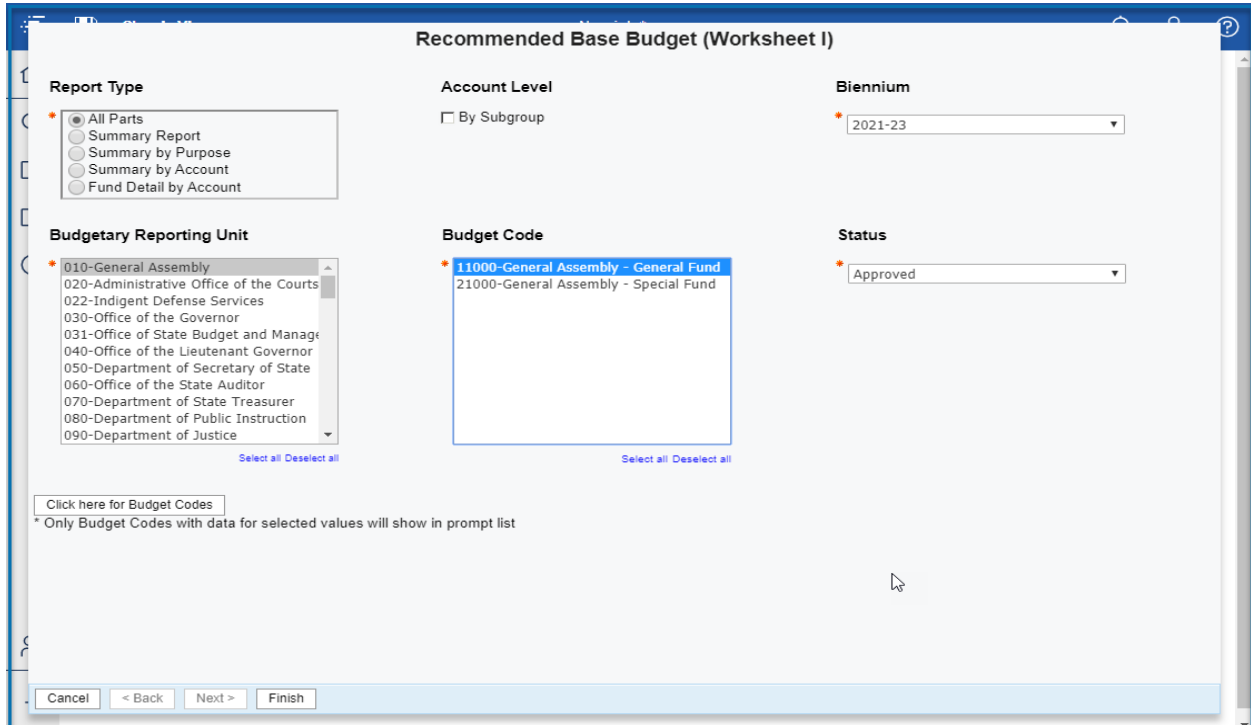
- Uncheck Include a link to the report.
- Scroll to the Bottom



- Click on Done at the bottom.



- Choose the Prompts you want to run



- Click on Finish