IBM Cognos Analytics - Navigation

IBIS Reports

Office of State Budget and Management

Prepared By
Ashok Guntupalli, Cognos Developer
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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.

- 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 (.Timestamp) indicates you are on the Home Page.
- Click (Timestamp) 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**

![Image of IBM Cognos Analytics interface]

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.

![Image of IBM Cognos Analytics interface with Renew button highlighted]

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).

<table>
<thead>
<tr>
<th>My Content</th>
<th>Team Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Formerly My Folders</td>
<td></td>
</tr>
<tr>
<td>- Contains objects only viewable by user</td>
<td></td>
</tr>
<tr>
<td>- Users can copy reports from Team Content folders and save to My Content for personal use</td>
<td></td>
</tr>
<tr>
<td>- Formerly Public Folders</td>
<td></td>
</tr>
<tr>
<td>- Contains standard reports and departmental folders and reports</td>
<td></td>
</tr>
<tr>
<td>- Users view items based on security</td>
<td></td>
</tr>
</tbody>
</table>

**Icons in My Content and Team Content**

<table>
<thead>
<tr>
<th>Folder</th>
<th>Package</th>
<th>Report View</th>
<th>Dashboard</th>
<th>Shortcut</th>
</tr>
</thead>
</table>

**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.
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
How to Rerun the report with different Prompt Values

- Click on Run as on the Application Bar

- Click on Reset prompts and run
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.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run as</td>
<td>Allows selection of report output type and Run in background mode</td>
</tr>
<tr>
<td>Edit report</td>
<td>Opens report in authoring tool for edits and changes</td>
</tr>
<tr>
<td>Create report view</td>
<td>Creates a report view, usually used to create a copy for scheduling</td>
</tr>
<tr>
<td>View versions</td>
<td>Displays any previously saved report output and previous run history</td>
</tr>
<tr>
<td>Create a new job</td>
<td>Ability to create a job</td>
</tr>
<tr>
<td>Share</td>
<td>Copy link to share content with other users</td>
</tr>
<tr>
<td>Take ownership</td>
<td>Used to update logged in user to become report owner</td>
</tr>
<tr>
<td>Copy or move</td>
<td>Copy report object to another destination in Cognos. Must have write access to selected destination.</td>
</tr>
<tr>
<td><strong>Create shortcut</strong></td>
<td>Used to create a shortcut version of the report. <strong>Not generally recommended.</strong></td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Used to delete the report object.</td>
</tr>
<tr>
<td><strong>Properties</strong></td>
<td>Displays report owner, relevant dates, report description and other options based on user Access</td>
</tr>
</tbody>
</table>

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

- 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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**Always move the Report to the My Content Folder**

![Copy or move: Worksheet I Report](image)

Select a destination

- **Copy or move:** Worksheet I Report

- Destination: Worksheet I Reports
- Select My Content

![Copy or move: Worksheet I Report](image)

Select a destination

- 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