# Cognos BI – How to Save Report with your prompt values

Step-by-Step Exercise



1. Navigate to the **Public Folders > UCAR Reports > Analytical Reports > Budget and Forecasting** 

IBM Cognos Connection	
Public Folders My	Folders
Public Folders > UCAR Reports > Analytic	al Reports > Budget and Forecasting
□   Name \$	
Forecast Reports - By Period	1
DO0 - Account Key Attribute	s History Report
000 - Account Key Attribute	<u>s Report</u>
DOU - Detailed Account Key	Attributes List Report
000 - Financial Organization	
OO1 - PM - Cost Projection A	nnual - Drill Through - FY
where the second s	nnual - Drill Through - Month/Quarter
OO1 - PM - Cost Projection A	NA 80
002 - PM - Expense Class by	
OO2b - PM - Account Status	with Expanded Budget
Account Keys to Move	
MTDC by Fund source	

2. Click on the 001 - PM - Cost Projection Annual - Drill Through - FY.

3. Select the account keys you want (click on the key(s) in the Results box or click on Select All, then click Insert) and click the Finish button.

恭UCAR	001 - PM Planning data u	UC - Cost Pro pdated hourly	jection An		
	Cancel	< Back	Next >	Finis	h
Account Key Status: Select Account Key Status to limit acco	unt key selection (belo	ow).			*Select Year:
Active Active Cosed Salect al Deselect al  * Select Account Key (3-6 cipts) or Display Select Account Key (3-6 cipts) or Display Compared Salect Account Key (3	kion/Lab/Program (2 di¢ ated by spaces. Or cii	gits): Type one or n	nore account keys	s or two	B         P         A3 (Fam)           C         P         1997           B         P         1998           C         P         1998           B         P         2000           B         P         2001           C         2002         D           B         P         2003           B         P         2004
	rch				± 🗖 🚥 2005
Options V					Image: Contract of the second seco
Results:	1	• Choice:			<ul> <li>2007</li> <li>2008</li> </ul>
536401 - NAVY C1 ContOps 539312 - NOAA CDR	Insert 🌩	530001 - CO 530002 - Co		-	<ul> <li></li></ul>
539703 - NASA 2DVAR	+ Remove	530003 - CO	SMIC ROCSAT		
530202 - C2 TAA 530203 - C2 Integration			PO/Proj Ofc Su SMIC Residual		± _ = 2011
530205 - C2 Integration			AAC Residual		
532109 - NASA ES GEODESY			F Outyr ProgMt		🕑 🔽 💳 2013
536209 - C2 CDAAC Develop 539008 - CWB IA#10 FFP	1		SMIC Worksho TA USERS WKS		🕀 🥅 🚥 2014
Select all Deselect	1	1000102 04		_	🕀 🔽 💶 2015 📃
Seect as pesseet	<u>81</u>		Select all Des	elect all	Deselect all
Select Contract: Keywords: Type one or more keywords separated	by spaces.				Select Fund Source:
	rch				E All FAS Fund Sources
Options *					Fund Source Orphans
Results:		Choice:			E NCAR ABR
	Insert 🔶				UCAR Fund Source
					🕀 🗖 🚥 UCAR Fund Source2
Select all Deselect	al		Select all Des	alact all	Deselect all
Select Subfacility:			AND ALL AND	3033.81	
	rch				
Options V					

4. Once the report runs, on the upper right hand corner of the screen click on 'Keep this Version', 'Save as Report View'.

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	CAR - powered by wo	dana   # 001 - P	H - Cost Projec								
IBM Cognos Viewer - 0	01 - PM - Cost Projection Ann	rual - Unit (Prou	gh-FY		1000				100 M	bechert Lasti 🏠 🖓 dand	
		UCAR							Englished Report	• • • • • • • • • • • • • •	• 100
UCAR	001 - PM - Co		n Annual	- FY					Us Save Report		
TUCAR		Summary							Sites an Report	Sex.	
	Planning data updated	hourly. Actual					-				
ear: 2013	NF): All Budget Types 2			All Contracts ce: All IFAS I	and Sources						
abfacility: All Subfacilit	ies		Tunu Sou	Co. Hill House	und Sources						
	mount	EAS Budget	Incurred	IFAS	#AS Funds	forecast	IFAS Budget vs				
	1988 W.	Current	Actual	Encumbrance	Available	100000	Forecast				
20205 - COSWC Residual	All Revenue and Expenses ex 9999	\$73,716.53	\$454.98	50	\$73,261.55	\$454.98 \$439.08	\$73,261.55 \$69,214.13				
20008 - CDAAC Residuel	All Revenue and Expenses as 2020 All Revenue and Expenses as 2020	\$69,653.21 \$110,807.84	\$439.08	\$ 0 \$22 687 06	\$69,214.13 \$45,139.06	\$439.08	569,214.13				
20007 - CVB Residual 20010 - NSF PM Conto Oza	All Revenue and Expenses ex 9999 All Revenue and Expenses ex 9999	\$110,807.64	\$42,961.72	\$22,687.06	\$45,139.06	\$114,018.05	(\$4,010.21) (\$8,778.96)				
20100 - NSF Outer ProgM	All Revenue and Expenses ex 9999	\$7,660.23	\$16,820.48	\$0	(\$9,468.25)	\$15,489.92	(\$7,529.69)				
10102 - DATA USERS WKSHP		\$1,000.23 \$6,697.95	310,020.00	\$1.11	(\$1,837.21)	\$15,400.92	(\$1,835.59)				
30105 - marricane Predic	At Revenue and Expenses ax 9929	\$2.154918915-13	50	30	\$0.00	50	\$2,15491591E-13				
20106 - C2 ALG & WRACT	All Revenue and Expenses ex 9999	(\$12,683,26)	50	50	(\$13,683,20)	50	(\$12,682,20)				
10107 - NSF SPECIAL PROJ	ALREVENUE and Expenses ax 1999	50	(\$137.52)	50	\$177.50	(\$137.52)	\$177.50				
10108 - CLIMATE RO DATA	All Revenue and Expenses ax 9999	\$1,006-82	(51,974.02)	50	\$1,974.01	(\$1,974.00)	\$1,974.01				
20114 - Staff Dupt Stud	All Revenue and Expenses ex 9999	\$27,411.07	5.0	50	\$27,411.07	50	\$27,411.07				
10202 - C2 TAA	ALERVIEWAR, AND EXPENSION AND SUPPORT	\$30,000.00	\$7,157.57	50	\$22,842,43	\$40,318.45	(\$10,318.45)				
10203 - C2 Integration	All Revenue and Expenses ex 9999	\$70,000.00	\$3,284.43	50	\$66,755.57	\$17,101.36	\$52,838.64				
20204 - AF Launch Refund	All Revenue and Expenses ex 9999	\$55,125.70	(32,440.30)	50	\$57,572.00	(\$2,445.20)	\$67,572.00				
10205 - C2 IA	ALERVANIA and Expension as 9999	\$281,501.00	\$942.45	50	\$280,558.55	\$942.45	\$280,558.55				
10302 - NOAA OV C2 SUPPT	All Revenue and Expenses ex 9999	\$12,420.13	\$6,823.17	50	\$5,495.96	\$11,608.20	\$811.93				
20202 - PD 4212119	All Revenues and Expenses as 2020	\$20,659.46	\$2,416.57	50	\$18,242.89	\$2,033.25	\$18,626.21				
20204 - 30AA /7-Security 20200 - 35PO Outvear PM	All Revenue and Expenses ex 9999 All Revenue and Expenses ex 9999	\$121,875.00 \$6,345,835,68	\$17,097.01	\$32,411,50 \$10,154,34	\$72,368.49	\$16,377.79 \$724.089.68	\$105,497.21 \$5.671.746.25				
	AL Revenue and Expenses ex 9999	36,395,835,88 \$64,502,00	\$59,368.53 \$22,390.83	\$10,184.34 \$21,658.77	\$9,326,283.01	\$724,089.66	30,6/1,746.20 \$12,806.36				
20502 - NSPO DUVEN PM				321,000.77	\$20,452.40						

5. Click on Select My Folders and OK



 After Selecting My Folders, you may click on Select Another Location to either select a sub-folder in My Folders or create a new Sub Folder in my folders.

Save as report view	<u>Help</u>	8
Specify a name and location for this entry. A report view shares the same report specification as the source	ce report.	
Name:		
Report View of 001 - PM - Cost Projection Annual - Drill The		
Location: My Folders Select another location		
OK Cancel		
		_

### **Cognos BI Navigation**

elect a	location (Navigate)	Help 🙁
lavigate	the folders or search to find where you want to place the entry.	Search
•	Cognos > My Folders	
	Entries: 1 - 9	
	Name 🗘	
0 0	anew	
0	Business Insight Advanced Training	
0	Chapter 1	
0	Divisional Reports	
0	My Report Views	
0	pilot	
0	Report Studio 1	
0	Report STudio 2	
0	Test	
		New folder

- 7. Once your location is selected click ok and ok again.
- 8. In the upper right-hand corner of your screen click on the bent arrow and navigate to My Folders and the location of your saved report view.

bschnell Log Off	IBM.
III 33 1 🗂 🖬 🕼 📽 🖬 🗼 📭 🖻	×ist
Entries: 1 - 1 O	444
Modified  Actions	
February 14, 2013 10:29:49 AM 🛛 💣 🔃 🕨 🔯	More
	Hodified 🗘 Actions

## 9. Click on the properties icon.

□   Name \$	Modified 🗇	Actions
E Report View of 001 - PM - Cost Projection Annual - Drill Through - FY	February 14, 2013 10:29:49 AM	🚰 📴 🕨 🐯 <u>More</u>
		_

10. Select Report View and change the following fields:

	/iew of 001 - PM - Cost Projection Annual - Drill Through - F
General Report v	
elect the default options t	o use for this entry.
Default action: Run the report	-
View most recent report Run the report	aues
Formats: Default	
Accessibility: Default	
Languages: Default	
Prompt values: No values saved Set	
Prompt for values	De-select Prompt values and click on Set
Run as the owner:	Values and click on Set
Advanced options 😽	

In the Set link returns the prompt page where you will need to enter your selection criteria one more time, and Click Finish:



# **Cognos BI Navigation** 12. Clicking Finish brings you back to the Properties settings. Once here, click ok. Set properties - Report View of 001 - PM - Cost Projection Annual - Drill Thro General **Report view** Permissions Select the default options to use for this entry. Default action: Run the report -Report options: Override the default values Formats: Default Accessibility: Default Languages: Default Prompt values: Account: '530001 - COSMIC', '530002 - Cosmi... View all Edit... Clear Prompt for values Run as the owner: bschnell Advanced options & OK Cancel

13. Now, navigate the place where you saved the view in My Folders and click on the report to run it. This report view is now connected to live data each time you run it! Drill downs (expand lists) and drill throughs also function as in the original report.

Click here to drill down	to expense class level.						
Ar	mount	IFAS Budget Current	Incurred Actual	IFAS Encumbrance	IFAS Funds Available	Forecast	IFAS Budget vs Forecast
530005 - COSMIC Residual	All Revenue and Expenses ex 9999	\$73,716.53	\$454.98	\$0	\$73,261.55	\$454.98	\$73,261.55
530006 - CDAAC Residual	All Revenue and Expenses ex 9999	\$69,653.21	\$439.08	<b>S</b> 0	\$69,214.13	\$439.08	\$69,214.13
530007 - CWB Residual	All Revenue and Expenses ex 9999	\$110,807.84	\$42,981.72	\$22,687.06	\$45,139.06	\$114,818.05	(\$4,010.21)
530010 - NSF PM Contg Ops	All Revenue and Expenses ex 9999	\$132,778.63	\$144,243.89	\$267,787.80	(\$279,253.06)	\$139,557.59	(\$6,778.96
530100 - NSF Outyr ProgMt	All Revenue and Expenses ex 9999	\$7,660.23	\$16,820.48	\$ 0	(\$9,160.25)	\$15,489.92	(\$7,829.69
530102 - DATA USERS WKSHP	All Revenue and Expenses ex 9999	\$6,697.98	\$8,534.08	\$1.11	(\$1,837.21)	\$8,528.07	(\$1,830.09
530105 - Hurricane Predic	All Revenue and Expenses ex 9999	\$2.18491891E-13	\$ 0	\$ 0	\$0.00	\$ 0	\$2.18491891E-13
530106 - C2 ALG & IMPACT	All Revenue and Expenses ex 9999	(\$13,683.20)	\$ 0	<b>\$</b> 0	(\$13,683.20)	\$ 0	(\$13,683.20
530107 - NSF SPECIAL PROJ	All Revenue and Expenses ex 9999	\$ 0	(\$137.50)	\$ 0	\$137.50	(\$137.50)	\$137.50
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# **Cognos BI Navigation**

3	Amount	IFAS Budget Current	Incurred Actual	IFAS Encumbrance	IFAS Funds Available	Forecast	IFAS Budget vs Forecast
530005 - COSMIC Residual	5000 - Salaries	<u>(\$1,107.35)</u>	<u>s o</u>	<u>s o</u>	(\$1,107.35)	\$0	(\$1,107.35)
	5100 - Benefits	<u>(\$574.71)</u>	<u>s o</u>	<u>s o</u>	(\$574.71)	\$0	(\$574.71)
	5200 - Materials & Supplies	<u>(\$27,183.28)</u>	<u>s o</u>	<u>\$ 0</u>	(\$27,183.28)	\$ 0	(\$27,183.28)
	5300 - Purchased Services	<u>\$125,534.35</u>	<u>\$345.73</u>	<u>\$ 0</u>	\$125,188.62	\$345.73	\$125,188.62
	5400 - Travel	<u>(\$702.18)</u>	<u>\$ 0</u>	<u>\$ 0</u>	(\$702.18)	\$ 0	(\$702.18)
	5500 - Equipment	<u>(\$11,599.99)</u>	<u>\$ 0</u>	<u>\$ 0</u>	(\$11,599.99)	\$ 0	(\$11,599.99)
	5700 - G&A Overhead/Burden	<u>(\$10,650.31)</u>	<u>\$109.25</u>	<u>s o</u>	(\$10,759.56)	\$109.25	(\$10,759.56)
530006 - CDAAC Residual	5000 - Salaries	<u>\$ 0</u>	<u>\$217.79</u>	<u>\$ 0</u>	(\$217.79)	\$217.79	(\$217.79)
	5100 - Benefits	<u>\$ 0</u>	<u>\$115.86</u>	<u>s o</u>	(\$115.86)	\$115.86	(\$115.86)

#### Click here to drill through to transaction

**Cognos BI Navigation**