

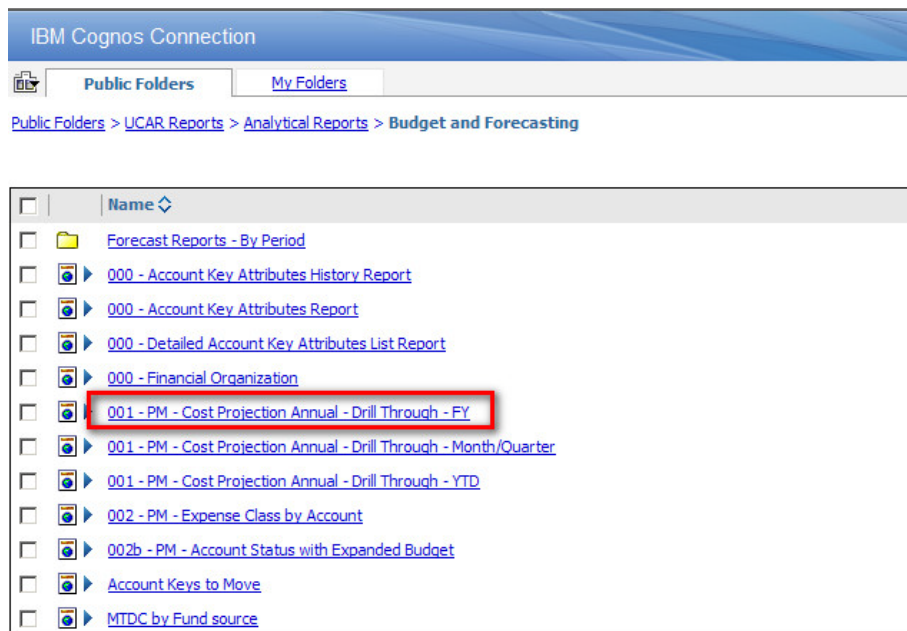
Cognos BI – How to Save Report with your prompt values

Step-by-Step Exercise



Navigate report folder structure


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



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

Cognos BI Navigation

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.



001 - PM - Cost Projection Annual - FY
Pricing data updated hourly. Actual data updated nightly.

Cancel
< Back
Next >
Finish

Account Key Status:

Select Account Key Status to limit account key selection (below).

☐ Active
☐ Inactive
☐ Closed

[Select all](#) [Deselect all](#)

***Select Account Key:**

Select Account Key (3-df) or Division/Lab/Program (2 digits). Type one or more account keys or two digit Division/Lab/Program codes separated by spaces. Or click Options to see keyword search pattern.

[Options](#)

Results:

536401 - NAVY C1 ContOps
539312 - NOAA CDR
539703 - NASA 2DVAR
530202 - C2 TAA
530203 - C2 Integration
530205 - C2 IA
532109 - NASA ES GEODESY
530209 - C2 CDAC Develop
539008 - CWB IA#10 FFP

Insert

Remove

[Select all](#) [Deselect all](#)

***Select Year:**

☒ All Years

☐ 1997

☐ 1998

☐ 1999

☐ 2000

☐ 2001

☐ 2002

☐ 2003

☐ 2004

☐ 2005

☐ 2006

☐ 2007

☐ 2008

☐ 2009

☐ 2010

☐ 2011

☐ 2012

☐ 2013

☐ 2014

☐ 2015

[Deselect all](#)

Select Contract:

Keywords:
 Type one or more keywords separated by spaces.

[Options](#)

Results:

Insert

Remove

[Select all](#) [Deselect all](#)

Choice:

[Select all](#) [Deselect all](#)

Select Subfacility:

Keywords:
 Type one or more keywords separated by spaces.

[Options](#)

Select Fund Source:

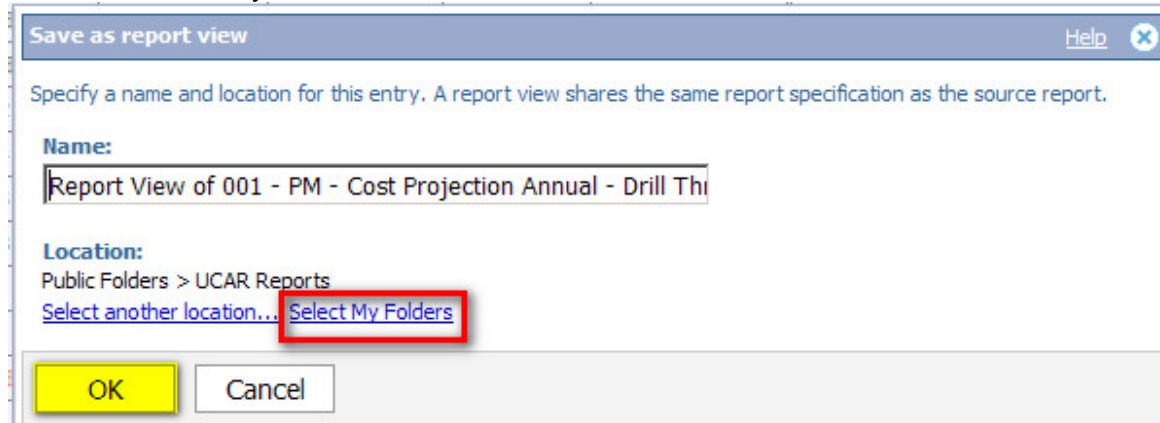
☒ All IAS Fund Sources
☐ Fund Source Origins
☐ NCAR ABR
☐ NCAR Fund Source
☐ NCAR Fund Source2

[Deselect all](#)

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

[illegible]

5. Click on Select My Folders and OK



Save as report view Help ✕

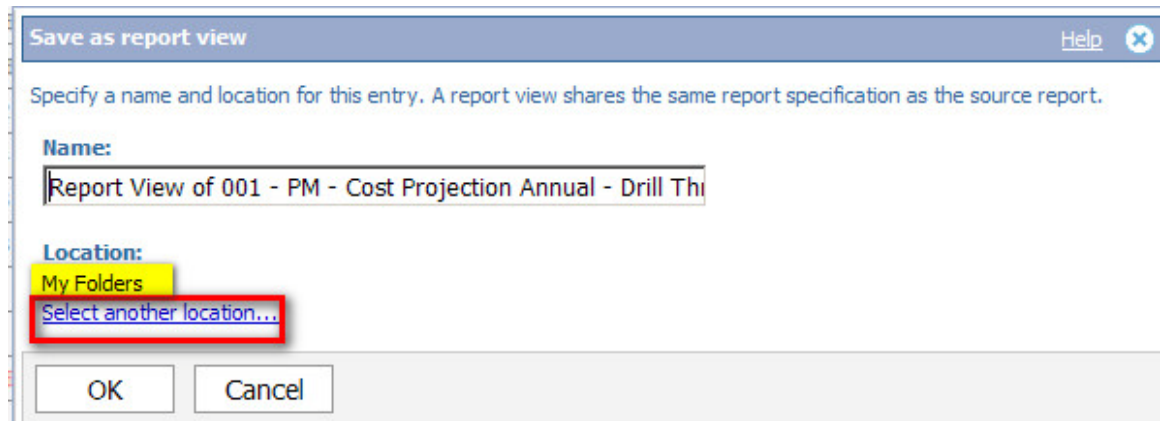
Specify a name and location for this entry. A report view shares the same report specification as the source report.

Name:
Report View of 001 - PM - Cost Projection Annual - Drill Th

Location:
Public Folders > UCAR Reports
[Select another location...](#) [Select My Folders](#)

OK Cancel

6. 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 Help ✕

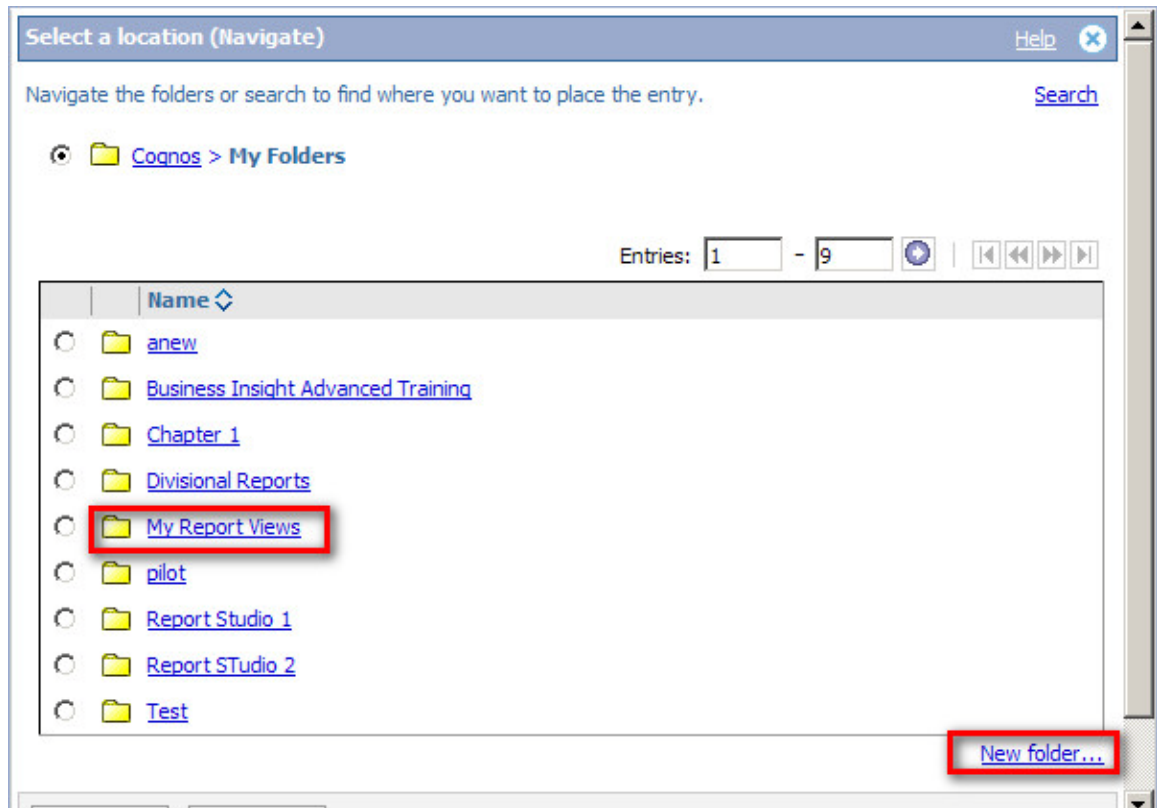
Specify a name and location for this entry. A report view shares the same report specification as the source report.

Name:
Report View of 001 - PM - Cost Projection Annual - Drill Th

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

OK Cancel

Cognos BI Navigation



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.



9. Click on the properties icon.



10. Select Report View and change the following fields:

Set properties - Report View of 001 - PM - Cost Projection Annual - Drill Through - FY

[General](#) **Report view** [Permissions](#)

Select the default options to use for this entry.

Default action:

Run the report
View most recent report
Run the report
☐ Override the default values

Formats:
Default

Accessibility:
Default

Languages:
Default

Prompt values:
No values saved
Set...
☒ Prompt for values

Run as the owner:
☐ bschnell

[Advanced options](#) ▾

OK Cancel

De-select Prompt values and click on Set

11. Clicking on 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



UCAR

001 - PM - Cost Projection Annual - FY
Planning data updated hourly. Actual data updated nightly.

[Cancel](#)[< Back](#)[Next >](#)[Finish](#)

Account Key Status:

Select Account Key Status to limit account key selection (below).

- ☐ Active
☐ Inactive
☐ Closed

[Select all](#) [Deselect all](#)

*Select Account Key:

Select Account Key (3-6 digits) or Division/Lab/Program (2 digits): Type one or more account keys or two digit Division/Lab/Program codes separated by spaces. Or click Options to see keyword search pattern.

 [Options](#)

Results:

536401 - NAVY C1 ContOps
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530205 - C2 IA
532109 - NASA ES GEODESY
536209 - C2 CDAAC Develop
539008 - CWB IA#10 FFP

[Select all](#) [Deselect all](#)

* Choice:

530001 - COSMIC
530002 - Cosmic II
530003 - COSMIC ROCSAT
530004 - NSPO/Proj Ofc Su
530005 - COSMIC Residual
530006 - CDAAC Residual
530100 - NSF Outyr ProgMt
530101 - COSMIC Workshop
530102 - DATA USERS WKSHP

[Select all](#) [Deselect all](#)

*Select Year:

- ☒ All Years
☐ 1997
☐ 1998
☐ 1999
☐ 2000
☐ 2001
☐ 2002
☐ 2003
☐ 2004
☐ 2005
☐ 2006
☐ 2007
☐ 2008
☐ 2009
☐ 2010
☐ 2011
☐ 2012
☒ 2013
☐ 2014
☐ 2015

[Deselect all](#)

Select Contract:

Keywords:

Type one or more keywords separated by spaces.

 [Options](#)

Results:

Choice:

Select Fund Source:

- ☒ All IFAS Fund Sources
☐ Fund Source Orphans
☐ NCAR ABR
☐ UCAR Fund Source
☐ UCAR Fund Source2

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:

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.

Amount		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	\$ 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 ProgMnt	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 WKSHIP	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	\$ 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

Cognos BI Navigation

Click here to drill through to transaction

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

