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 > Analytical Reports > Budget and Forecasting
□ Name ≎
Forecast Reports - By Period
D00 - Account Key Attributes History Report
D 000 - Account Key Attributes Report
Detailed Account Key Attributes List Report
O00 - Financial Organization
O01 - PM - Cost Projection Annual - Drill Through - FY
001 - PM - Cost Projection Annual - Drill Through - Month/Quarter
DO1 - PM - Cost Projection Annual - Drill Through - YTD
002 - PM - Expense Class by Account
002b - PM - Account Status with Expanded Budget
Account Keys to Move
T S 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	UCAR 001 - PM - Cost Projection Annual - FY Planning data updated hourly. Actual data updated nightly.					
	Cancel	< Back	Next >	Finish		
Account Key Status:				*	Select Year:	
Active Active Active Active Active Active Selectal Presence and Solutions	wakenLabProgram (2 di annted by spaces. Or ci earch (2) ■ Insert ● Remove ■ cstat	 W). Type one or m Choice: S30001 - CO S30002 - Coc S30003 - CO S30008 - CO S30008 - CO S30008 - CO S30100 - IS S3010 - IS S30	SMIC SMIC I SMIC I SMIC Residual ACC Residual ACC Residual ACC Residual SMIC Rockston SMIC Workshon SMIC Workshon SMIC Juryskon SMIC SMIC SMIC I SMIC A SMIC A SMIC I SMIC	p SHP SHP SHP		
Select Contract: Keywords: Type de or mere keywords separ Type de or mere keywords separ Second separation of the second	Insert *	Choice:		s	elect Fund Source: ⊕ □ □ ■ AI FAS Fund Sources ⊕ □ ■ Fund Source Orphans ⊕ □ ■ MCAR ABR ⊕ □ ■ UCAR Fund Source ⊕ □ ■ UCAR Fund Source2	
Select all Dese	ect all		Select all Des	elect all	Leseiect all	
Select Subfacility: Keywords: Type one or more keywords separa Quitons %	ited by spaces. earch					

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

ible Gognos newer - o	01 - PM - Cost Projection Ann	UCAR	gh - FY	_		-		Bestevent Landon () A time IB Stans Staumann • • • • • • • • • • • • • • • • • •
UCAR	001 - PM - Co	st Projectio Summary	n Annual	- FY				Status Report
2012	Planning data updated	hourly. Actual	data update	d nightly.			-	
aar: 2013 udget Type (UY, CY, TR, ubfacility: All Subfacilit	NF): All Budget Types 2 les		Fund Sou	rce: All IFAS I	und Sources			
	mount	EAS Budget	Incurred	PAS	#AS Funds	forecast	IFAS Budget vs	
530005 - COSMC Residual	All Revenue and Expenses ex 9999	\$73,716,53	\$454.98	50	\$73,261.55	\$454.98	\$73,261,55	
10108 - CDAAC Residual	At Revenue and Expenses ax 9999	\$69,653.21	\$439.08	50	\$69,214.13	\$439.08	\$69,214.13	
10007 - CWB Residual	All Revenue and Expenses ax 9999	\$110,807.84	\$42,961.72	\$22,887.06	\$45,129.06	\$114,010.05	(\$4,010.21)	
20010 - NSF PM Conto Opa	ALRevenue and Expenses as 2022	\$132,778.63	\$144,243.89	\$267,787.80	(\$279,253.06)	\$139,557.59	(\$8,775.96)	
20100 - NSF Outer Prost/I	Al Revenue and Expenses as 9999	\$7,660.23	\$16,820.48	50	(\$9,107,25)	\$15,489.92	(\$7,829.69)	
10102 - DATA USERS WKERP	All Revenue and Expenses ax 9999	\$6,697.98	\$8,534.08	\$1.11	(\$1,837.21)	\$8,528.07	(\$1,830.09)	
130105 - marricana Predic	ALBevenue and Expenses ax \$929	\$2.184918916-13	50	50	\$8.00	5.0	\$2.18491891E-13	
10106 - C2 ALG & MPACT	All Revenue and Expenses ex 2003	(\$13,683,28)	50	50	(\$13,663.20)	50	(\$12,683.20)	
S10107 - NSF SPECIAL PROJ	ALREVENUE and Expenses ax 1999	50	(\$137.52)	\$0	\$177.50	(\$137.52)	\$127.50	
530105 - CLMATE RD DATA	All Revenue and Expenses ax 9999	\$1,006-62	(\$1,974.02)	50	\$1,974.01	(\$1,974.00)	\$1,974.01	
530114 - Staff Supt Stud	All Revenue and Expenses ex 9999	\$27,411.07	5.0	50	\$27,411.07	5.0	\$27,411.07	
10202 - C2 TAA	ALBEVENIE AND Expenses as 3999	\$30,000.00	\$7,157.57	50	\$22,842,43	\$40,318.45	(\$10,218.45)	
510203 - C2 Integration	All Revenue and Expenses ex 9999	\$70,000.00	\$3,284.43	50	\$66,715.57	\$17,101.36	\$52,838.64	
10204 - 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	
510205 - C2 IA	ALBEVENIE and Expenses as 9999	\$281,501.00	\$942.45	50	\$280,558.55	\$942.45	\$280,558.55	
S10302 - NOAA OY C2 SUPPT	All Revenue and Expenses ex 9999	\$12,420.13	\$5,923.17	50	\$5,495.95	\$11,608.20	\$811.93	
530303 - PD 4310119	ALExistes and Expenses av 2022	\$20,659.46	\$2,416.57	50	\$18,242.09	\$2,033.25	\$18,626.21	
530304 - NOAA IT-Security	At Revenue and Expenses as 9999	\$121,875.00	\$17,097.01	\$32,411.50	\$72,368.49	\$16,377.79	\$105,497.21	
	All Revenue and Expenses ex 9999	\$6,395,835.08	\$59,368.53	\$10,184.34	\$6,326,283.01	\$724,089.68	\$5,671,746.20	
S10500 - NSPO Outvear PM	All Revenue and Expenses ax 9999	\$64,502.00	\$22,390.83	\$21,658.77	\$20,452.40	\$51,693.64	\$12,808.36	

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 re	port.	
Name:		
Report View of 001 - PM - Cost Projection Annual - Drill Th		
Location:		
My Folders		
Select another location		
OK Cancel		

Cognos BI Navigation

ielect 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.

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Bit Public Folders Hy Folders		
My Folders > My Report Views	III 44 📑 🖬 🔮 😫	11 X 16 18 X 12 13
	Entries: 1	- 1 🔘 (4.44.66) (4
T Name C	Modified 🗘	Actions
T 🐻 Report View of 001 - PM - Cost Projection Annual - Drill Through - FY	February 14, 2013 10:29:49 AM	🗊 🔃 🕨 🖾 More

9. Click on the properties icon.

		· · · · · · _
🗖 📔 Name 🗘	Modified 🗇	Actions
T B 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:

|--|

et properties - Report	/iew of 001 - PM - Cost Projection Annual - Drill Through - F
General Report v	iew <u>Permissions</u>
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
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.						
Ai	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	S 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)	S 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
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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>\$ 0</u>	(\$574.71)	\$0	(\$574.71)
	5200 - Materials & Supplies	<u>(\$27,183.28)</u>	<u>s o</u>	<u>s o</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>s o</u>	<u>s o</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	(\$10,650.31)	<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>s o</u>	<u>\$115.86</u>	<u>\$ 0</u>	(\$115.86)	\$115.86	(\$115.86)

Click here to drill through to transaction

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