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Running Cognos Reports

1. Open Internet Explorer – the recommended browser for Cognos as stated by IBM.
2. Go to mySLU and logon.
3. From mySLU’s Home page, select the Tools tab.

mySLU Home page:
Cognos for Finance Users

4. Click on the Cognos icon on the mySLU Tools tab.

mySLU Tools tab:
5. The IBM Cognos Connection screen should appear. Select **Reports** from the **Public Folders** tab.

   a. This is also where you can find the **Frequently Asked Questions** folder – see the Frequently Asked Questions screen in the FAQs section of this document on page 27.
   
   b. ODS Packages folder.
   
   c. Reports folder.
   
   d. SLU Packages folder.
   
   e. If selected, the My Folders tab will have a ‘No Entries’ message until you create a folder or save a report to your My Folders.

**Public Folders screen:**

![Public Folders screen]

6. Click on the Reports folder.

7. On the Reports Screen, click the **Business Managers** subfolder.

**Reports screen:**

![Reports screen]
8. You should now see the **Business Managers screen**. Please note the ‘breadcrumb trail’ below the Public Folders tab: Public Folders > Reports > Business Managers

   Note: You can click on any section of the breadcrumb and return to that section.

9. Click on the Finance folder to see the **Finance screen**.

### Business Managers screen:

![Breadcrumb trail](image1)

![Finance folder](image2)

10. The Finance screen may have 1 or 2 folders, depending on your access. The names of the folders are Budget Development and/or Fiscal Management. Budget Development will only be visible to personnel who have Budget Management access in SSB.

11. Click on the Fiscal Management folder.

### Finance screen:

![Fiscal Management](image3)
12. The Fiscal Management folder lists the available reports. Many of these reports are replacements for one or more Old WebFOCUS reports.

   a. See Appendix A for the Old WebFOCUS to Cognos report crosswalk on page 30.
   b. See Setting Preferences for report display guidance on page 25.
   c. See the Fiscal Management screen - shown below in List View. To see the Fiscal Management screen in Detail View, go to page 13.

Fiscal Management screen:

13. On the List View screen, click on the report named BUSFM001 Statement of Account (FGR101 & FGR102). Clicking on the report name will cause the report to run. Most reports will prompt you for input parameters which will limit the data appearing on the report. If prompted, select the required and/or optional parameters.

   a. Fiscal Year and Fiscal Period are examples of required parameters. A required parameter will contain the red dashed line under the input area. If you neglect to choose a required parameter the Run Report button will not be active.
   b. Optional parameters include a single fund and/or account.

   See the Prompt Page screen to view all the parameters available for this report.
Prompt Page screen:

Required parameters

Optional parameters

Prompt Page screen continued:

Run Report

Exit
14. After choosing the desired parameters, click the Run Report button at the bottom of the prompt page. To return to the Fiscal Management screen without running the report, click the Exit button.

15. After clicking Run Report, a report will render that looks similar to the Sample Excel Report screen below.

Sample Excel Report screen:
The Cognos Connection

In this section, we will review various features available to users in Cognos. You will need to be on the Fiscal Management screen. See previous example on page 7.

To return to the Fiscal Management screen (see the Return screen example below):

a. If you ran the report in HTML or PDF format, click on the Return icon, or the Back button.

b. If you used an Excel format, click on the red Close button on the Excel page.

Note: Do not use the red Close button while on a Cognos screen. You will exit Cognos.

Return screen example.

My Folders discussion:

When you return to the Fiscal Management screen, you should see two tabs: Public Folders and My Folders. You will be in the Public Folders area. The My Folders area is the location you will use to save reports.

Discussion of the My Folders area will follow.
Adding a folder to your My Folder tab.

1. Click on the folder icon: 

Adding a Folder screen:

2. Type the folder name and description in the appropriate boxes. See the New Folder Wizard screen below.

3. Click on Finish.

New Folder Wizard screen:
Your new folder:
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Report Details View

1. Click on the Details View icon (toward the upper center of the screen across from the breadcrumbs), which will display a brief description of each report in the Fiscal Management subfolder. We have included the Old WebFOCUS report name, where applicable, in the name and description of the report. You can also run the report from this view by clicking on the report name OR by clicking on the Run with Options Icon: which we will discuss later.

Report Details View screen:

2. Click on the List View icon (to the left of the Details View icon) to return to List View.
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Set Properties Screens

1. The Set properties icon (located under the Actions column on the List View of the Fiscal Management screen) will display two tabs, General and Report, which allow you to view additional report information.

   a. The General tab will have general report information. See the Set Properties screen – General tab below, to view an example.

Set Properties screen – General tab:

![Set Properties screen – General tab](image)

- **Dates report created & modified**
- **Report Description**
- **Report Package**
b. The Report tab of the Set Properties screen is used by the report developers to set various default options. See the Set Properties – Report tab below, to view an example.

Set Properties screen – Report tab:

Click on the ‘X’ next to Help in the upper right corner, or click on the Close button near the bottom of the page, to return to the Fiscal Management screen.
Alternate Ways to Run Cognos Reports

1. Proceed to the Fiscal Management breadcrumb if you are not already there. Under the Actions, column there is a Run with options icon: . See the Fiscal Management screen below.

Fiscal Management screen (showing various icons):

Note: Default report format icons
   a. - PDF
   b. - Excel
   c. - HTML
2. Click on the Run with options icon: 📋. The Run with Options screen will allow you to modify the Format, Language, Delivery, Prompt Values, and additional options using the ‘advanced options’ link. See the Run with Options screen below.

3. After you make your selections on the Run with options screen, or using the ‘advanced options’ link, click on the Run button to run your report (lower left corner).

Run with Options screen:

![Run with Options screen example](image-url)
Advanced Options link discussion:

If you want to specify a time or make other changes to the report execution, click on the ‘advanced options’ link.

1. To set a time for the report to run, to change the mode, format, orientation, paper size and/or Prompt Values, see the **Advanced Options screen** below.

2. To view the report now, click the radio button next to ‘View the report now’, then click on the Run button on the bottom left side of the page.

Advanced Options screen:

- **View the report now**
- **Run in the background**
- **Format**: PDF, HTML, Excel 2007, etc.
- **Orientation**: Default, Portrait, Landscape
- **Paper Size**: Default, Letter, Legal, etc.
- **Language**: English (United States)
- **Run button**
3. To choose alternative delivery options, click the radio button next to ‘Run in the Background’. The benefit of this option is that it allows the user to request multiple simultaneous reports. You can also select delivery options such as saving the report to your My Folders or email it to yourself. See the **Run in the Background screen**.

Run in the Background screen:
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Delivery Methods: Saving the Report

From the Advanced Options / Run in the Background screens:

1. Click on the check box next to ‘Save the report as a report view’.

2. Click on the ‘Edit the options’ link. See the Save as Report View screen below.

3. When the Save as Report view screen opens, check the location. Ensure that you will be saving the report to My Folders.

4. Click on OK.

5. You will return to the Run with Advanced Options screen.

6. Click on the Run button to run the report.

Note: Any report saved outside of the My Folders area will be deleted. This means if you place report output in a location on the Cognos Connection that is not in your My Folders area, it will be deleted by ITS.
Save as Report View screen.

An example of My Folders with a saved report:
Delivery Methods: Email

1. Click on the check box next to ‘Send the report by email’.

2. Click on the ‘Edit the options’ link. See the Email screen below.

3. Enter the email address or addresses desired.

   Note: Content control of all reports is the responsibility of the user. Ensure the report is appropriate for all recipients. It is strongly recommended to run the report, review it, and then email if necessary.

4. Enter any additional notes in the body of the email.

5. Click on the ‘attach the report’ check box.

6. Click on the OK button (lower left corner).

7. See the Received Email sample screen, to view an example of an email with the report attached.

   Note: The report name is automatically entered as the email Subject but can be changed.

Email screen:

![Email screen diagram](image-url)
Received Email sample screen:
Using Create a Report View ()

Note: This screen also allows you to save a copy of the report to your My Folder.

Create a Report View screen:

Select My Folders link for location.
Setting Preferences

In order to increase the number of reports visible on your Fiscal Management folder, you will need to modify the number of entries in the list view which is located within the My Preferences area.

1. Click on the My Area icon on the tool bar just above the IBM Cognos Connection tool bar. See the My Area screen below.

2. Click on My Preferences. See the My Preferences screen to view the various options.

My Area screen:
3. Check the number of entries of entries in the box below the verbiage ‘Number of entries in the List View’. Increase the number to 50 or whatever you wish.

4. Click on the OK button (lower left corner). You will be taken back to the Fiscal Management screen. See Fiscal Management Screen 2.

5. Notice the number of entries in the Entries boxes. Use the page arrows to display the next group of entries. If all the entries are displayed, the page arrows will not be functional and will be greyed out.

My Preferences screen:

Fiscal Management screen 2:
FAQs

1. Using the breadcrumbs, click on Public Folders to return to the Public Folders tab.

2. The IBM Cognos Connection screen should appear.

3. Click on the Frequently Asked Questions folder. See **Public Folders screen 2** and the **Frequently Asked Questions screen**.

Public Folders screen 2:

![Public Folders screen 2]

Frequently Asked Questions screen:

![Frequently Asked Questions screen]
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Search

Sample search: Search for ‘fixed assets’ in a report name.

1. Click on the arrow to the right of the search icon.

2. Select the field you want to search: Name field, Description field, Name or description field. For this example, the Name field was selected.

3. Type the search criteria in the box to the left of the icon, then click on the search icon.

Search Options screen:

4. If the search criteria is not found, you may need to click on ‘Advanced’ to add additional search options. See Search screen 1. Note the ‘No Entries.’ message. Click on any of the arrows near Method, Modified, Type or Scope for additional search options. For this example, the Method arrow was selected, and then the 1st item in the drop down list: ‘Contains the exact string’.

Search screen 1:
5. You can change the search criteria while on this screen. Since there isn’t a report with ‘fixed assets’ in this report list, change the search to ‘fgr101’. See the results on the Search Results screen.

6. Click on the Return icon to return to the Fiscal Management screen. You can also run the report from this location, clicking on the report name or the Run with options icon:

Search Results screen:

- fgr101
- Search results: BUSFM001 Statement of Account (FGR101 & FGR102)
- Return icon
# Appendix A – Crosswalk

## Old WebFocus to Cognos Report Crosswalk

<table>
<thead>
<tr>
<th>Old WebFocus</th>
<th>Cognos</th>
<th>Cognos Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FGR101</strong> Statement of Account; <strong>FGR102</strong> Statement of Account Active Funds</td>
<td><strong>BUSFM001</strong> Statement of Account</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td><strong>FGR104</strong> UMG Responsibility Summary by Fund; <strong>FGR105</strong> UMG Responsibility Summary by Department; <strong>FGR106</strong> UMG Responsibility Summary by Sub-Department</td>
<td><strong>BUSFM803</strong> Responsibility Summary by Dept, Sub-Dept, Fund</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td><strong>FGR107</strong> UMG Revenue/Expense Category by Fund; <strong>FGR108</strong> UMG Revenue / Expense Category by Department; <strong>FGR109</strong> UMG Revenue / Expense Category Detail by Department; <strong>FGR111</strong> UMG Revenue / Expense Category by Sub-Department</td>
<td><strong>BUSFM801</strong> Revenue / Expense Category</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td><strong>FGR108</strong> UMG Revenue/Expense Category by Department</td>
<td><strong>BUSFM802</strong> Revenue / Expense Category Internal Medicine</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td><strong>FGR110</strong> UMG Responsibility Summary by Sub-Department Excel</td>
<td><strong>BUSFM803a</strong> Responsibility Summary by Dept, Sub-Dept, Fund - Excel</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td><strong>FGR120</strong> Labor Distribution by Pay Period; <strong>FGR122</strong> Labor Distribution by Pay Period Excel</td>
<td><strong>LDR002</strong> Labor Distribution by Pay Period</td>
<td>TBD</td>
</tr>
<tr>
<td><strong>FGR121</strong> Labor Distribution Detail by Month; <strong>FGR123</strong> Labor Distribution Detail by Month Excel</td>
<td><strong>LDR001</strong> Labor Distribution by Month</td>
<td>TBD</td>
</tr>
<tr>
<td><strong>FGR300</strong> Fund List for All Ledgers; <strong>FGR301</strong> Fund List for All Ledgers Excel</td>
<td><strong>BUSFM013</strong> Banner Fund Listing</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>Old WebFocus</td>
<td>Cognos</td>
<td>Cognos Folder</td>
</tr>
<tr>
<td>-------------</td>
<td>--------</td>
<td>---------------</td>
</tr>
<tr>
<td>FGR310 Detail Trial Balance by Division and Fund; FGR312 Detail Trial Balance by Division and Fund Excel</td>
<td>BUSFM005 Trial Balance Audit</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>FGR313 Summary Trial Balance by Attribute (Whole Dollar Format); FGR314 Summary Trial Balance (Decimal Dollar Format); FGR322 Account Code Summary</td>
<td>BUSFM009 Account Code/Trial Balance Summary</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>FGR315 Statement of Current Designated and Restricted Funds by Exec Level and Division; FGR325 Statement of Current Designated and Restricted Funds by Exec Level, Div Excel</td>
<td>BUSFM018 Designated &amp; Restricted Funds by Exec Level/Division and Expense Code; BUSFM018 Excel</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>FGR316 Statement of Current Designated and Restricted Funds by Department; FGR317 Statement of Designated and Restricted Funds by Sub-Department; FGR326 Statement of Current Designated and Restricted Fund by Department Excel; FGR327 Statement of Current Designated and Restricted Funds by Sub-Department Excel</td>
<td>BUSFM019 Fund Balances - by Dept or Sub Dept; BUSFM019 Fund Balances - by Dept or Sub Dept - Excel</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>FGR321 Revenue/Expense Code Audit</td>
<td>BUSFM026 Revenue/Expense Code Audit</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>FGR323 Account Code Audit</td>
<td>BUSFM010 Account Code Audit</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>FGR324 Sponsored Program Fund Activity</td>
<td>SP0002 Sponsored Program Fund Activity</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>FBR015 Fund Account Budget Excel (WebFocus Dashboard Finance Development Domain Folder)</td>
<td>BUSFB020 Fund Account Budget - Excel</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Budget Development</td>
</tr>
<tr>
<td>N/A</td>
<td>BUSFM031 Fund Balance - Deficit Status/Overhead Assessment Attribute/Term Date</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>N/A</td>
<td>BUSFM032 General Unrestricted Deficit Balances</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>N/A</td>
<td>BUSFM033 Discretionary Funds</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
<tr>
<td>N/A</td>
<td>BUSFM804 Account Codes sorted by UMG Category Code</td>
<td>Reports &gt; Business Managers &gt; Finance &gt; Fiscal Management</td>
</tr>
</tbody>
</table>
## Appendix B - Icons

### Cognos Connection Navigation Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Log Off Icon" /></td>
<td>Log Off</td>
<td>Exit Cognos</td>
</tr>
<tr>
<td><img src="image" alt="Refresh Icon" /></td>
<td>Refresh</td>
<td>Display or reload the latest, updated version of the screen</td>
</tr>
<tr>
<td><img src="image" alt="Search Icon" /></td>
<td>Search</td>
<td>Search for report, query, job, etc entries within Cognos</td>
</tr>
<tr>
<td><img src="image" alt="Home Icon" /></td>
<td>Home</td>
<td>Return to the home view from the user’s current Cognos location</td>
</tr>
<tr>
<td><img src="image" alt="My Area Icon" /></td>
<td>My Area</td>
<td>Includes My Watch Area, My Settings, and My Activities and Schedules</td>
</tr>
<tr>
<td><img src="image" alt="Launch Icon" /></td>
<td>Launch</td>
<td>Launch reporting studios and Administration console</td>
</tr>
<tr>
<td><img src="image" alt="Help Icon" /></td>
<td>Help</td>
<td>Access help from within Cognos</td>
</tr>
<tr>
<td><img src="image" alt="Tab Menu Icon" /></td>
<td>Tab Menu</td>
<td>Add, remove or modify the sequence of the tabs</td>
</tr>
<tr>
<td><img src="image" alt="Return Icon" /></td>
<td>Return</td>
<td>Return to previous page (See Name Search Results screen for an example)</td>
</tr>
<tr>
<td><img src="image" alt="Scroll Icon" /></td>
<td>Scroll</td>
<td>Scroll right or left within Cognos Connection</td>
</tr>
</tbody>
</table>
### Cognos Connection Command Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="List View" /></td>
<td>List View</td>
<td>Change layout of Cognos Connection to a List view</td>
</tr>
<tr>
<td><img src="image" alt="Details View" /></td>
<td>Details View</td>
<td>Change layout of Cognos Connection to a Details View</td>
</tr>
<tr>
<td><img src="image" alt="New Folder" /></td>
<td>New Folder</td>
<td>Create a new folder</td>
</tr>
<tr>
<td><img src="image" alt="New Job" /></td>
<td>New Job</td>
<td>Create a new job</td>
</tr>
<tr>
<td><img src="image" alt="New URL" /></td>
<td>New URL</td>
<td>Create a new URL</td>
</tr>
<tr>
<td><img src="image" alt="New Page" /></td>
<td>New Page</td>
<td>Create a new page</td>
</tr>
<tr>
<td><img src="image" alt="Cut" /></td>
<td>Cut</td>
<td>Cut a folder, URL, report, query, etc entry and move to a new location</td>
</tr>
<tr>
<td><img src="image" alt="Copy" /></td>
<td>Copy</td>
<td>Copy a folder, URL, report, query, etc entry and move to a new location</td>
</tr>
<tr>
<td><img src="image" alt="Paste" /></td>
<td>Paste</td>
<td>Paste a folder, URL, report, query, etc entry that has been cut or copied and move to a new location</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /></td>
<td>Delete</td>
<td>Delete an entry from Cognos Connection</td>
</tr>
<tr>
<td><img src="image" alt="Set Properties" /></td>
<td>Set Properties</td>
<td>Change permissions and user group assignments</td>
</tr>
<tr>
<td><img src="image" alt="Order" /></td>
<td>Order</td>
<td>Change the display order of folders, packages, etc within Cognos Connection</td>
</tr>
<tr>
<td><img src="image" alt="Package" /></td>
<td>Package</td>
<td>Cognos Connection Package</td>
</tr>
<tr>
<td><img src="image" alt="Folder" /></td>
<td>Folder</td>
<td>Cognos Connection Folder</td>
</tr>
</tbody>
</table>
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Icon Menu Screen Shots

IBM Cognos Connection tool bar screen:

My Area screen:

My Area menu:
- My Watch Items
- My Preferences
- My Activities and Schedules
Cognos for Finance Users

Help Menu screen:

Tab menu screen:

Help Menu:
Help
Quick Tour
Getting Started
IBM on the Web
Go to the Welcome Page
About IBM Cognos Connection

Tab menu:
Add tabs
Remove this tab
Modify the sequence of tabs…