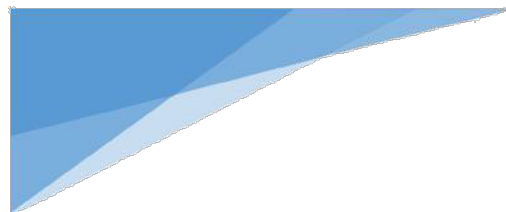


IBM Cognos
Analytics



KFS REPORTING USER GUIDE

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Introduction

With the release of the KFS 7 upgrade, Cognos version 11 (henceforth known as Cognos Analytics) will be simultaneously released to campus users. Reports run in Zot!Portal will automatically run in Cognos Analytics starting on February 20th, 2018. Users who develop their own reports through the Cognos specific portal (Cognos Connection) will need to validate their reports (and packages if necessary), in the new Cognos Analytics environment by April 30th, 2018. Transition training will be provided for those interested in validating their reports and packages in Cognos Analytics.

This user guide is intended for those who use Cognos Connection to run existing reports. It will provide an overall introduction to the new Cognos Analytics user interface and how to run a report in both the new Cognos Connection environment and the familiar Zot!Portal website. We will also go over new basic features of Cognos Analytics that demonstrate some of the improved functionality.

Conversion Timeframe to Cognos Analytics – version 10.2 to version 11.0

Timeframe:

February 20th, 2018:

- Quali Financial System Decision Support Reports on Zot!Portal will begin running on Cognos Analytics (cognos.oit.uci.edu).
 - Conversion should be seamless to the user.
- Consumers can continue running custom reports in Cognos Connection version 10.2.2 (bi.oit.uci.edu) after validating their reports.
- Developers and consumers of ad-hoc reports can begin migrating and running their custom reports in Cognos Analytics (cognos.oit.uci.edu) by validating their reports in the new environment. Training for this will be provided.

April 30th, 2018:

- Cognos 10.2.2 (bi.oit.uci.edu) will no longer be available to UCI Cognos report users for development or ad-hoc reporting
- Conversion of packages and reports to Cognos Analytics for ad-hoc reporting and report development in Cognos Connection must be completed.

What does the conversion to Cognos Analytics mean to you?

- The Cognos Connection URL will be changing to:
<https://cognos.oit.uci.edu/ibmcognos/bi>

If you have any shortcuts or bookmarks to any Cognos reports, you will have to update your links with the new URL. Run the report in Cognos Analytics to get a valid URL to replace your link.

- Clear cache history and enable javascript, if prompted by browser, the first time you log in to Cognos Analytics.
- Ensure your browser is updated (laptops too). Internet Explorer (v11), Firefox Extended Support Release (v52) and Chrome (v45) are compatible browsers for Cognos 11.0.7.
 - Please request a new install of Firefox ESR through OIT HelpDesk if you are currently on Firefox Quantum. Firefox Quantum is NOT compatible with Cognos Analytics.

How to Run Reports on Zot!Portal

The process for running reports on Zot!Portal KFS Decision Support Portlet has not changed. The user experience in Cognos Analytics should be a seamless transition.

Instructions

1. Connect and login to the Zot!Portal website: <https://portal.uci.edu>. Use your UCInetID and password to login.

Signon screen:



UCInetID Secure Web Login

UCInetID Information

Note: Links open in new window(s)

- [Activate your UCInetID](#)
- [UCInetID Info](#)
- [View Recent Account Activity](#)

The resource you requested requires you to re-authenticate. Or, you may login as another user.

UCInetID
UCInetID Example: ptanteater

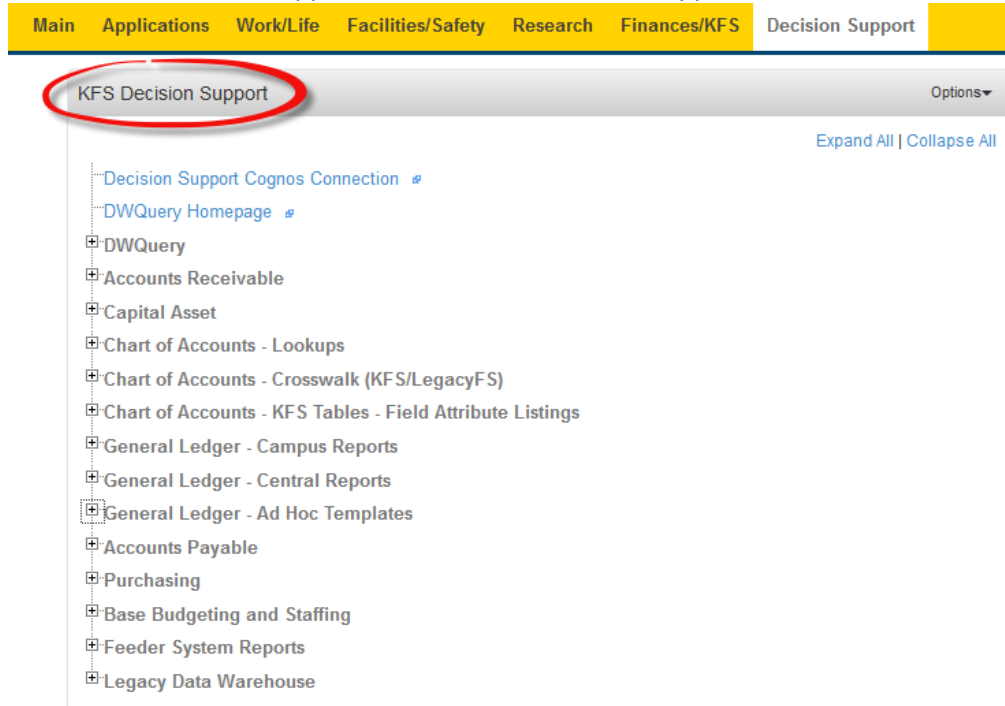
Password

Login

[Forgot your password?](#)

WARNING! Protect your privacy. Logout when you are done and completely exit your browser.

Find the KFS Decision Support Portlet under “Decision Support” or “Finances/KFS”:



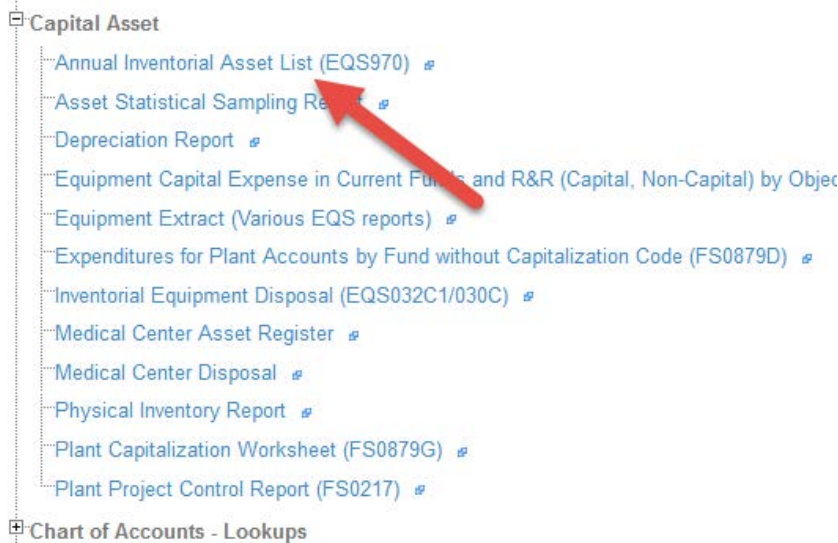
Main Applications Work/Life Facilities/Safety Research Finances/KFS Decision Support

KFS Decision Support Options

Expand All | Collapse All

- Decision Support Cognos Connection
- DWQuery Homepage
- DWQuery
- Accounts Receivable
- Capital Asset
- Chart of Accounts - Lookups
- Chart of Accounts - Crosswalk (KFS/LegacyFS)
- Chart of Accounts - KFS Tables - Field Attribute Listings
- General Ledger - Campus Reports
- General Ledger - Central Reports
- General Ledger - Ad Hoc Templates
- Accounts Payable
- Purchasing
- Base Budgeting and Staffing
- Feeder System Reports
- Legacy Data Warehouse

- Run reports by expanding a category (clicking on the plus sign) to show hyperlinks to the reports.



- Click on a hyperlink to bring up the report in a new tab on your browser. You may need to sign on the first time, using your UCINetId and password to login to Cognos. You also may need to clear your cache history the first time you log on.
- If a prompt page exists, a prompt page will show any fields that the user can enter to run the report. To run the report, click the "Run" button at the bottom of the page.

5. The Report output will be in HTML by default. To export the report to PDF, Excel or Excel to data format, click on the downward pointing triangle to the right of the HTML icon located in the upper right area of the output page. This will expand the format drop down where you can select your output format.

The screenshot shows the top right corner of the report page. A red arrow points to a dropdown menu that has been expanded from the HTML icon. The menu options are: View in HTML Format, View in PDF Format, View in XML Format, and View in Excel Options. The report title is "KFS Annual Inventorial Asset List" and it is dated "As of: Feb 14, 2018".

TAG Number (Property ID)	Asset Nbr	Item Description	BLDG	Room	Condition Code	Manufacturer Name	Model #	Organization Text	Serial Number	CPTLAST_ACQ_TYP_CD	UC ACQ Code	Object Sub Type Cd	Purch Ord
019001873	14	PROJECTOR	9125	0421	N1	mitsubishi	2000 LUMEN XGA	RESPONSIBLE PERSON: D SALTARELLI	0002812	P	31	CM	P0085
019001881	15	FLUIDIC STATION	9087	0382	O2	AFFEYMETRIX	FS450	-	FS0914	P	31	CM	P0085
019001883	16	MICROPLATE READER	9323	D0488	O2	LABSYSTEMS	MULTISCAN RC	-	351031409	P	31	CM	P0085
019001894	17	CENTRIFUGE, BECKMAN J2-21	9329	0357	O2	BECKMAN	J2-21	RESPONSIBLE PERSON: ZHOU, QUN-YONG	3083	P	31	CM	00858
019001896	18	MICROSCOPE IMAGING MOTORIZED	9091	4474	O2	ZEISS	AXIOPLAN 2	-	3511000859	P	31	CM	02023
019001897	19	PRINTER	9208	0224	N2	HP	8150DN	RESPONSIBLE PERSON: BRYAN HUA NOTES: SALVAGED	USBLL09545	P	31	CM	P0085

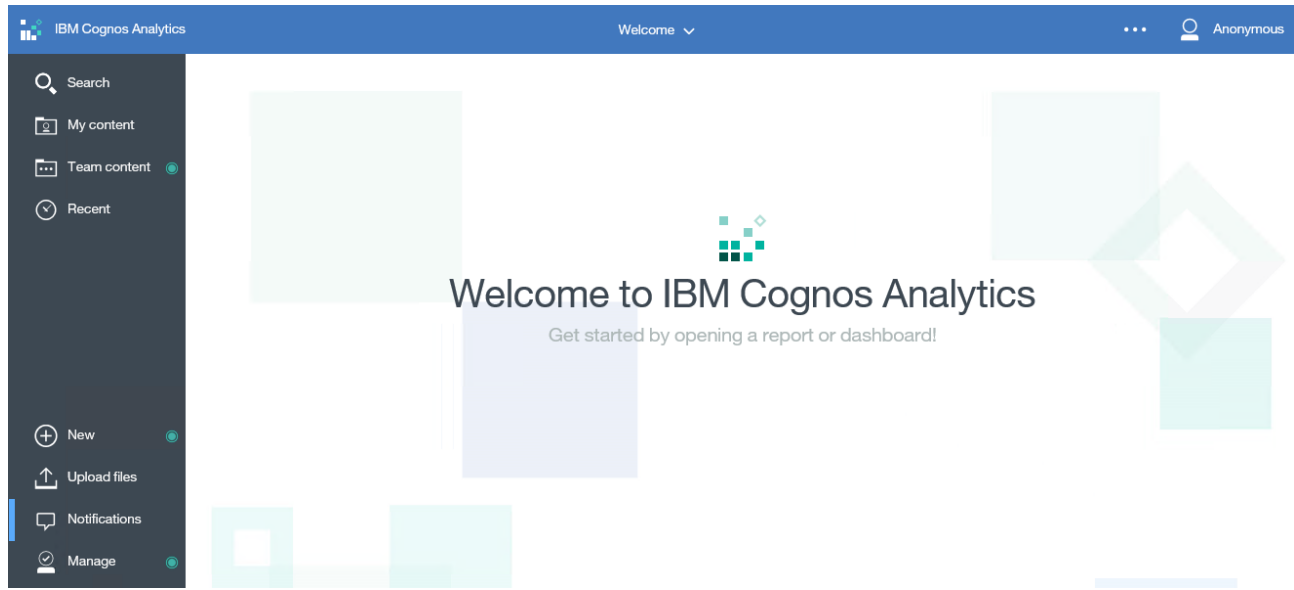
6. Click the Back button to run the report again with a different input field.

The screenshot shows the top left corner of the report page. A red arrow points to a "Back" button. The report title is "KFS Annual Inventorial Asset List" and it is dated "As of: Feb 14, 2018".

TAG Number (Property ID)	Asset Nbr	Item Description	BLDG	Room	Condition Code	Manufacturer Name	Model #	Organization Text	Serial Number	CPTLAST_ACQ_TYP_CD	UC ACQ Code	Object Sub Type Cd	Purch Ord
019001873	14	PROJECTOR	9125	0421	N1	mitsubishi	2000 LUMEN XGA	RESPONSIBLE PERSON: D SALTARELLI	0002812	P	31	CM	P0085
019001881	15	FLUIDIC STATION	9087	0382	O2	AFFEYMETRIX	FS450	-	FS0914	P	31	CM	P0085
019001883	16	MICROPLATE READER	9323	D0488	O2	LABSYSTEMS	MULTISCAN RC	-	351031409	P	31	CM	P0085
019001894	17	CENTRIFUGE, BECKMAN J2-21	9329	0357	O2	BECKMAN	J2-21	RESPONSIBLE PERSON: ZHOU, QUN-YONG	3083	P	31	CM	00858
019001896	18	MICROSCOPE IMAGING MOTORIZED	9091	4474	O2	ZEISS	AXIOPLAN 2	-	3511000859	P	31	CM	02023
019001897	19	PRINTER	9208	0224	N2	HP	8150DN	RESPONSIBLE PERSON: BRYAN HUA NOTES: SALVAGED JULY 08	USBLL09545	P	31	CM	P0085
019001898	20	PRINTER	9208	0430	N2	HP	8150DN	-	USBLL09752	P	31	CM	P0085
019001702	23	RESEARCH MICROSCOPE	9136	2119	O2	NIKON	E800	RESP: LINDA MCCARTHY NOTES: MOVED	342800	P	31	CM	P0085

Cognos Analytics (version 11.0) Overview

- Single, simplified, unified Welcome portal for all tools
 - Welcome portal uses a sliding panel instead of tabs and folders
 - User experience is the same on all devices
 - More intuitive and interactive



- New Smart Search
 - Fully indexed resulting in quicker results
 - Similar to Google search, returns results as you type
 - No wildcards are needed
 - Searches can be saved for future use
 - Search results can be filtered by content type (reports, dashboards, folders etc.) and by date
- Recently Used Files
- Personalization Opportunities
 - Set home page
- On- Screen Hints/Coach Marks

Accessing Cognos Analytics

The process for running reports in Cognos Analytics (without using the Zot!Portal) begins by logging in to the Welcome Portal. The URL for the Cognos Analytics has changed to the following:

<https://cognos.oit.uci.edu/ibmcognos/bi>

Signon screen:

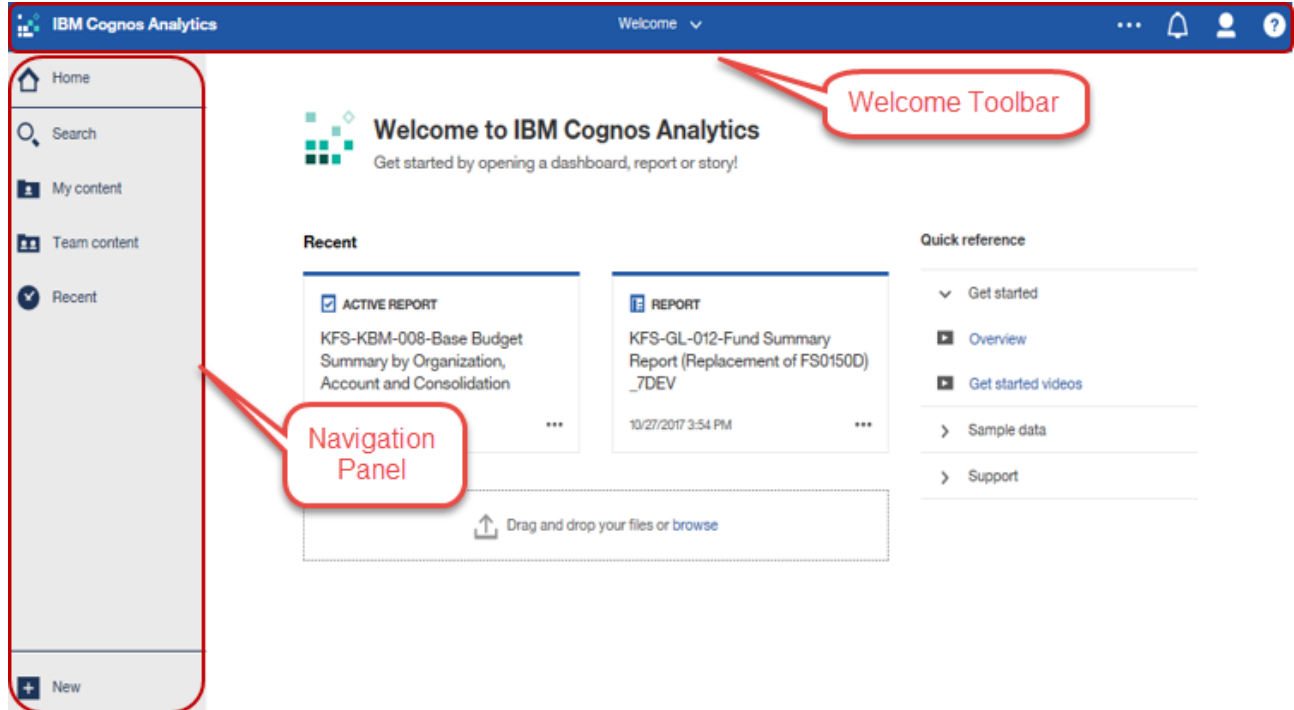


The image shows the UCInetID Secure Web Login screen. At the top, there is the University of California - Irvine logo and name. Below that, the text "UCInetID Secure Web Login" is displayed. The main content area is divided into two sections. On the left, under "UCInetID Information", there is a note: "Note: Links open in new window(s)" and three bullet points: "Activate your UCInetID", "UCInetID Info", and "View Recent Account Activity". On the right, there is a login form with a warning message: "The resource you requested requires you to re-authenticate. Or, you may login as another user." The form includes fields for "UCInetID" (with an example "ptanteater") and "Password", a "Login" button, and a "Forgot your password?" link. At the bottom of the form, there is a "WARNING! Protect your privacy. Logout when you are done and completely exit your browser." message.

Remember, that you may need to clear your cache and cookies history the first time you log in to Cognos Analytics. You also may need to enable javascript in order for the interface to work.

When first logging into Cognos Analytics the user will be directed to the Welcome Portal Home Page. The following pages will guide you through the Navigation Panel and the Toolbar of the Welcome Portal as well as how to run reports in Cognos Analytics.

Cognos Analytics Welcome Portal:




The image shows the IBM Cognos Analytics Welcome Portal. The top navigation bar is blue and contains the text "IBM Cognos Analytics" on the left, "Welcome" with a dropdown arrow in the center, and three icons (three dots, a bell, and a user profile) on the right. Below the navigation bar, the main content area is white. On the left, there is a "Navigation Panel" with a vertical list of items: "Home", "Search", "My content", "Team content", "Recent", and "New". A red callout box labeled "Navigation Panel" points to this list. In the center, there is a "Welcome to IBM Cognos Analytics" message with the subtext "Get started by opening a dashboard, report or story!". Below this, there are two "Recent" report cards. The first is an "ACTIVE REPORT" titled "KFS-KBM-008-Base Budget Summary by Organization, Account and Consolidation". The second is a "REPORT" titled "KFS-GL-012-Fund Summary Report (Replacement of FS0150D)_7DEV" with a date of "10/27/2017 3:54 PM". A red callout box labeled "Welcome Toolbar" points to the top navigation bar. On the right, there is a "Quick reference" section with a list of items: "Get started", "Overview", "Get started videos", "Sample data", and "Support". At the bottom of the main content area, there is a "Drag and drop your files or browse" button.

Navigating the Cognos Analytics User Interface (UI)

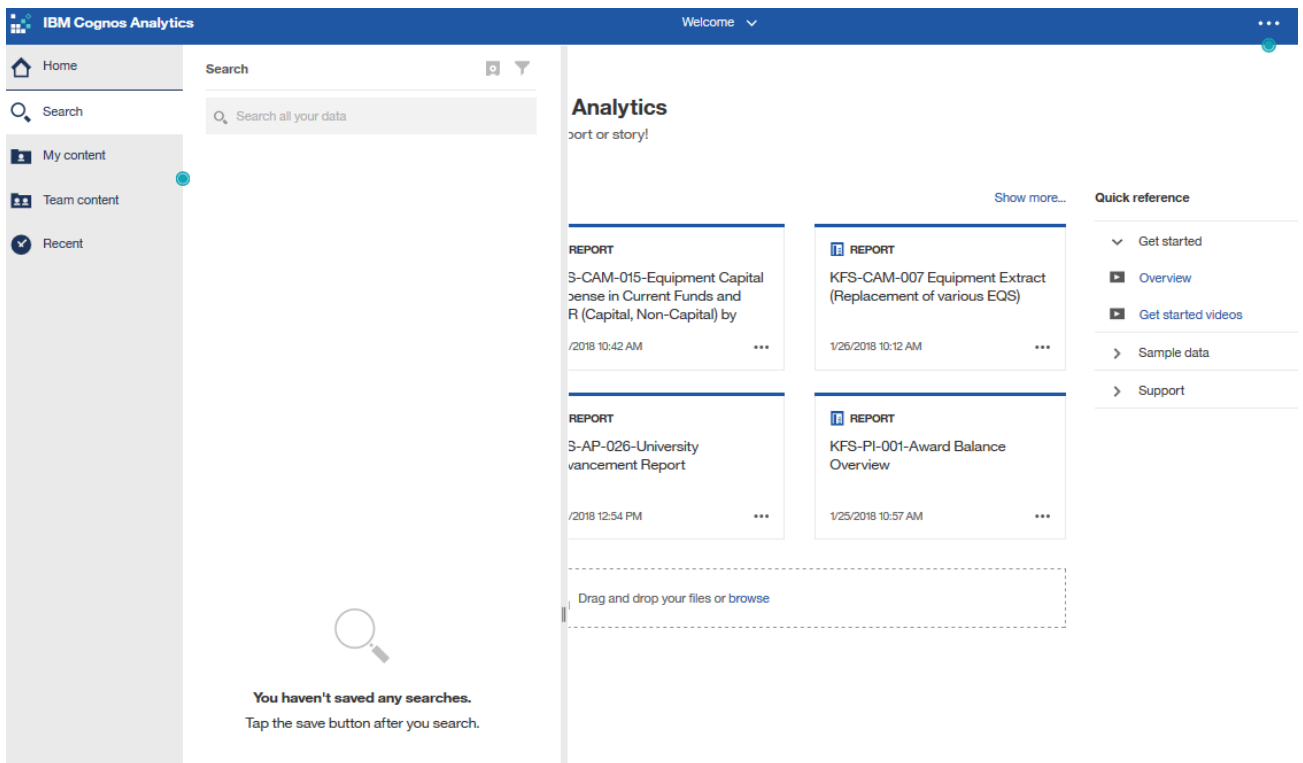
The goal of the new UI and navigation panel is to provide users with a streamlined way to view content and activities.

Navigation Panel.

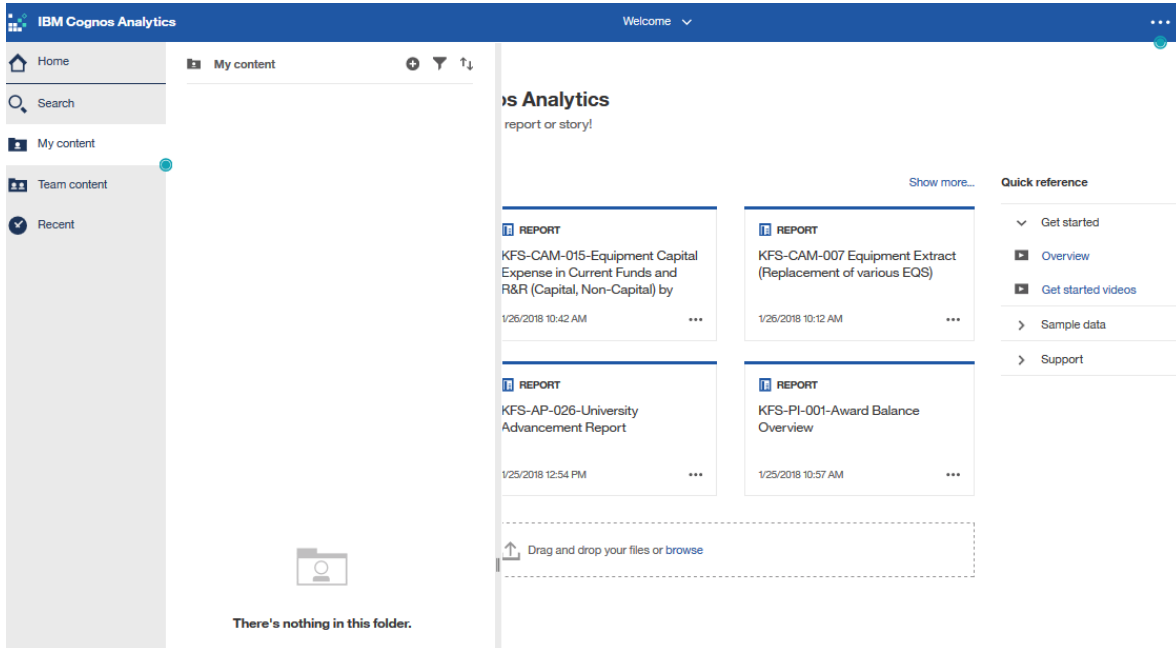
On the left side of the UI is the main **Navigation Panel**. This navigation panel is present on the UI at all times and updates as the user works with the various capabilities within Cognos Analytics.

 Indicates a hint is available

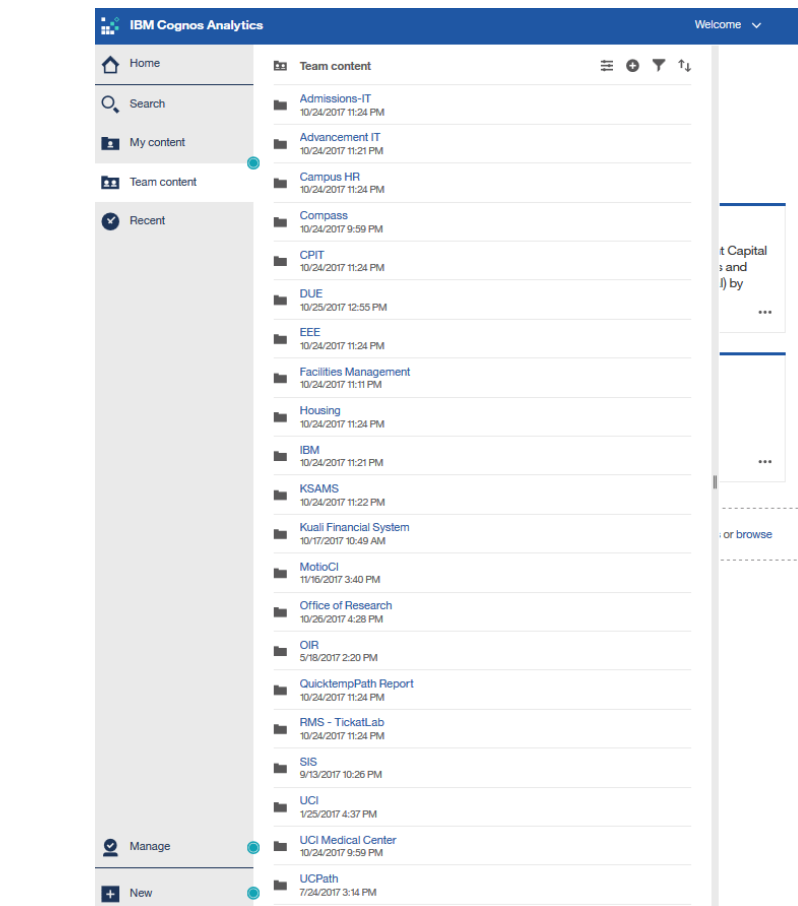
- 1. Search.** The New Smart **Search** in Cognos Analytics provides a modernized search engine that uses a smart, intent-driven search function to assist the User. **Click** on **Search** to open the search panel. As you type, an auto-fill feature will launch and give search suggestions for related terms. **Click** outside the **Search** panel to close it. Searches can be saved or filtered.



- 2. My content (was My Folders in version 10.2).** The **My content** folder is the personal folder of the user within Cognos Connection. Any object in the **My content** folder cannot be shared with or viewed by other users.

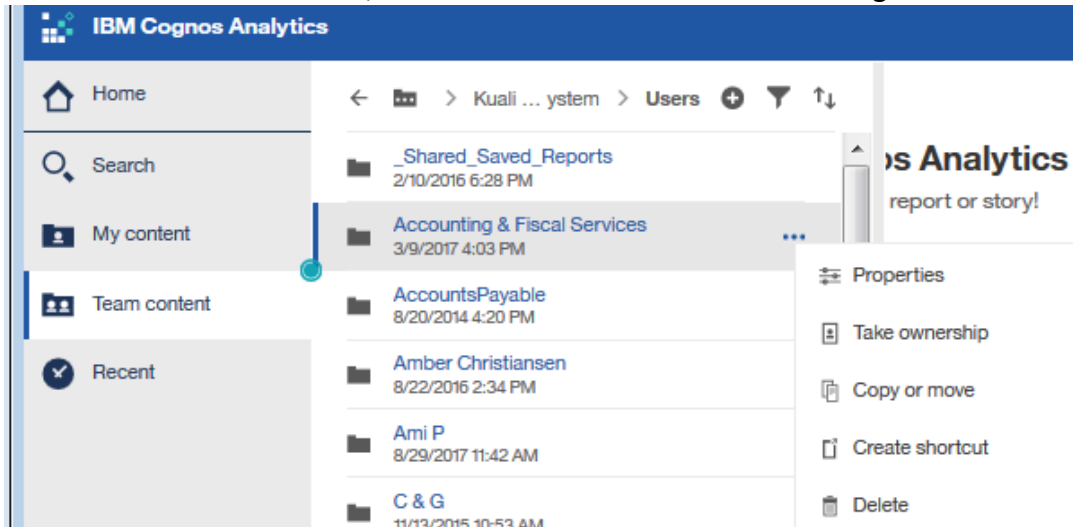


3. Team content (was Public folders in version 10.2). The **Team content** folder contains all Cognos reports and data downloads the user has permissions to view. **Click on Team content** to open the navigation panel. Notice there is a list of folders. **Click** outside the Team content panel to close it.



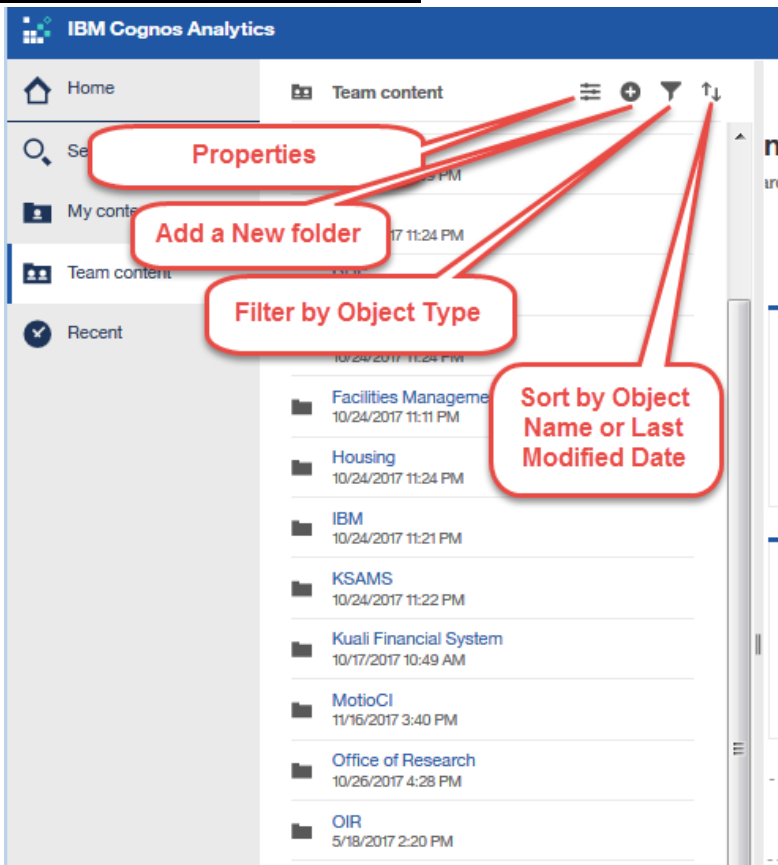
More button

As you traverse the folder structure, notice there is a **More** button to the right of the folder name.



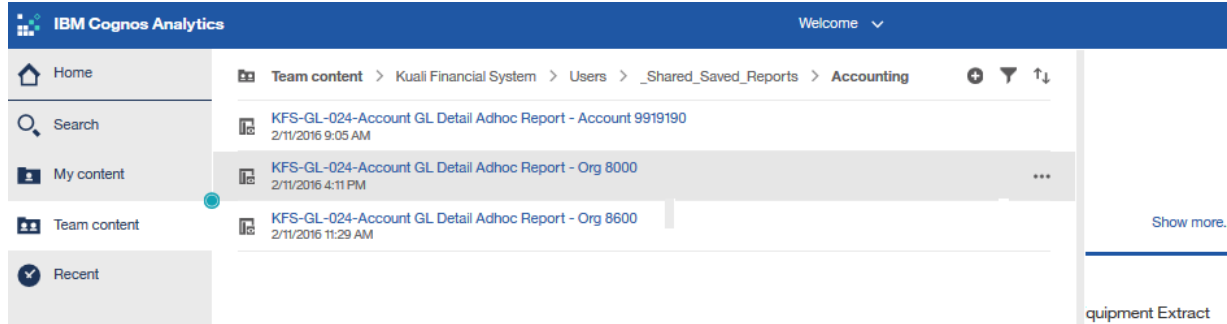
The **More** button (the ellipsis **...**) appears when the mouse hovers over the object name. Clicking it displays Properties, and other functions that the user has permissions to view and execute. A Right-click on the object name creates the same drop down menu. The menu will change depending on the object type (folder, report, view, or shortcut, etc.) and with user permissions.

Team content Navigation options



Running Cognos Reports from Cognos Connection

Run Cognos reports in HTML format by first finding your report using the Navigation Panel. For example, if the report you are looking for is in “Team Content”, click on the “Team Content” area and a panel will appear to the right. Traverse down the folder hierarchy by clicking on the folder name to find your report. Slide the vertical gray pane to the right over to display the complete path above. Click on the report name to run the report.

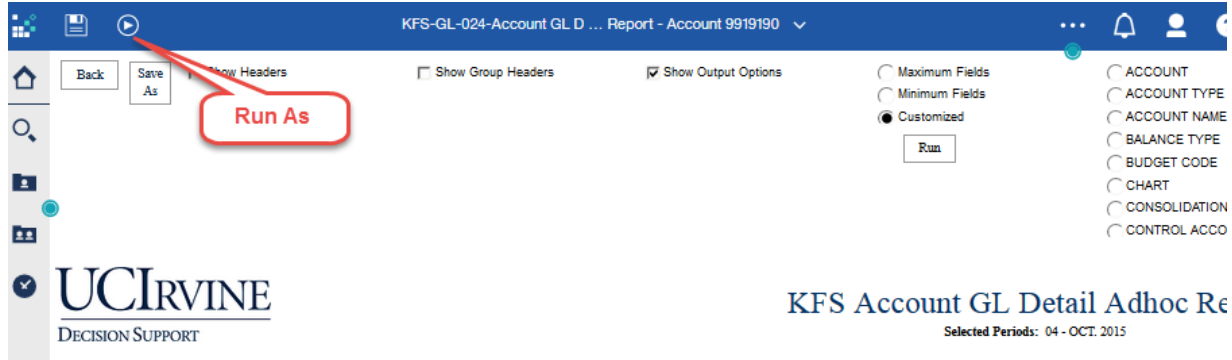


Once the name of the report is clicked, the report will appear in the same tab. If a prompt page exists, then you will see the prompt page. If there is no prompt page, then the report will run and show in HTML format:



Exporting Reports to PDF or Excel

There are two ways to show a Cognos report in other than its default HTML format. One way is to run the report first as HTML format as described in the previous page. Once the report has run in HTML, the “Run As” play button appears on the upper left hand side of the Report Page.



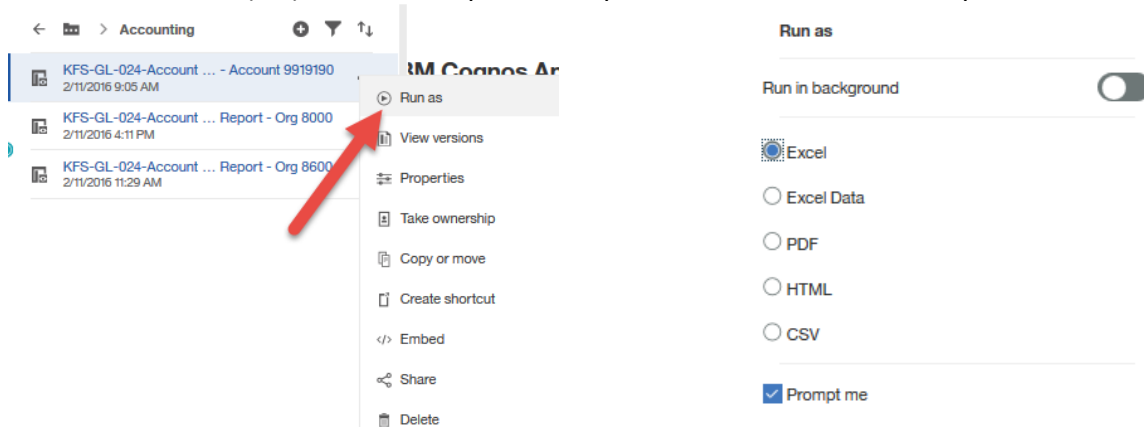
The “Run As” menu allows the user to choose any of the following formats. Once the format is chosen, the reports runs again in the chosen format with the parameters already entered by the user.

For example, if “Run PDF” is chosen the report automatically reruns with the same parameters used to create the HTML. To run the report with different parameters, choose the “Reset prompts and run” option.

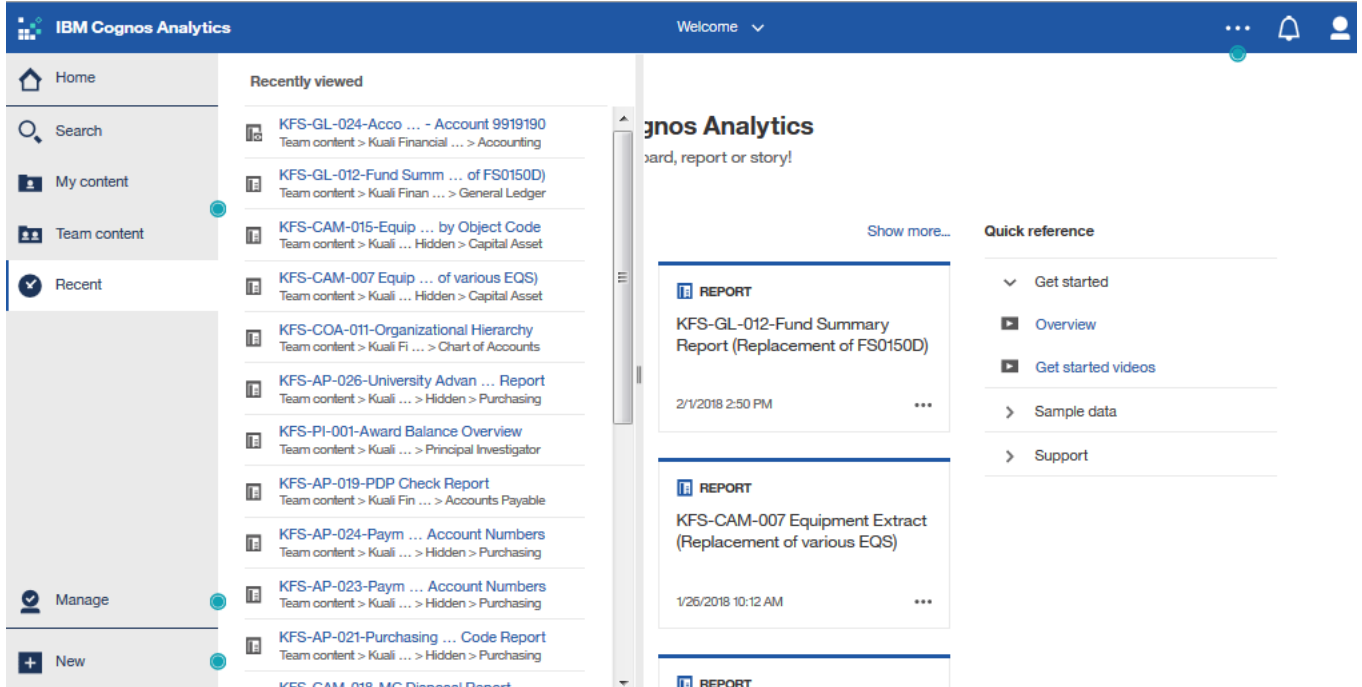
- Run HTML
- Run PDF
- Run Excel
- Run Excel data
- Run CSV
- Reset prompts and run



A second way to display reports as PDF, Excel, or as Excel data is to use the “Run As” button *before* running the report from Cognos Connection. To access the “Run As” menu from Cognos Connection, hover the mouse over the report name to expose the **More** (⋮) button to the right of the file name. Click on the **More** (⋮) button to expose the options and then select the option to “Run as”.



4. **Recent.** Below the **Team content** button is the **Recent** button. This button shows the user up to 20 of the most recently used objects (reports, dashboards, data modules, etc.) with the most recently used on top. Once an object is viewed, it will move to the top of the list. **Hover** the mouse over the left icon of each object to identify the type of object. **Click** outside the **Recent** panel to close it.

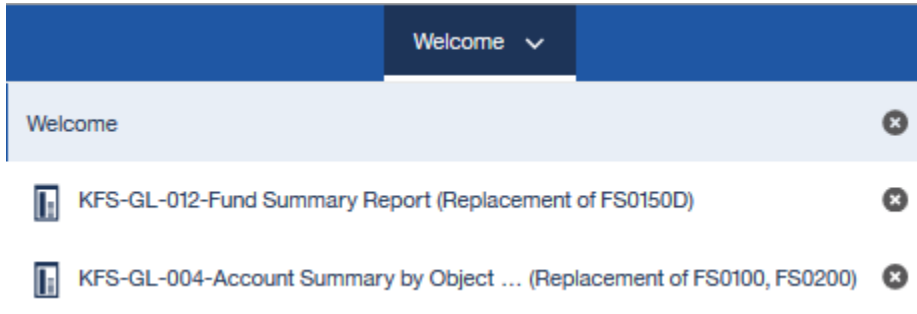



5. **New.** The **New** button allows the user to create a new report, dashboard or data module. Upcoming training sessions for Cognos Developers will address this menu in the future.
6. **Upload files.** The **Upload files** button allows users to upload Excel files for quick analysis and visualizations. Excel XLS, XLSX and CSV files may be uploaded. **Note:** Only the first tab of a multi-tabbed spreadsheet will upload. Save each tab as a separate file if you want to upload multiple tabs of data. Size limit is 100MB.
- OIT will provide training sessions for this feature in the future.
7. **Notifications** – If the user subscribes to a report or report view, the user is notified every time the report is re-run. The subscription option is available when the user runs or views a report, but not if you view saved output.

Toolbar



1. Welcome – Navigates the user to the Home Page. The user may set one or more reports, dashboards or queries as home pages.



2. More  - Sets the user's home page(s).

When running a report, the **More** menu gives the user the option to “Share”, “Embed”, or “Subscribe”.




Set as home

Share

Embed

Subscribe

3. Notifications  -- When running a report, this icon opens a pane showing any notifications from reports or report views the user has subscribed.



Notifications

4. User Logon (Personal Menu) - Sets user preferences and manages subscriptions. This is also where the user can log out of Cognos Analytics.



Your name & email address

My subscriptions

My preferences


Log my session

My Inbox

My Watch Items

Sign out

Other Training/Reference Resources:

1. Click the  icon. **Help** takes the user to the IBM Cognos Analytics 11.0 documentation page.
https://www.ibm.com/support/knowledgecenter/SSEP7J_11.0.0/com.ibm.swg.ba.cognos.cbi.doc/welcome.html



About

Help

Education portal

Community

The **Community** option takes the user to the IBM Cognos Analytics Community <http://www.ibm.com/communities/analytics/cognos-analytics/>

2. The Cognos Developers Training website (still under construction) in the UCI Wiki includes links to training (mostly for report developers):

<https://wiki.oit.uci.edu/display/public/UCI+Cognos+Developer+Training>

Glossary

Cognos Analytics	IBM Cognos Analytics is the next version of IBM Cognos Business Intelligence. It integrates reporting, modeling, analysis, dashboards, stories, and event management so you can understand your organization's data, and make effective business decisions.
Cognos Connection	Welcome Portal
Personal Menu	Where you can set preferences, manage subscriptions, view your credentials and manage logging levels for troubleshooting purposes. This menu is also where users can sign out of Cognos.
My Content	Your private area to save and organize your content. Only you can see the content that is stored in My content. It is useful for saving report views with your custom prompts or for saving report output versions.
Navigation Panel	The panel on the left side of the Welcome Portal home page uses sliding panels instead of tabs and folders. Find content and run and create reports from this panel.
Notification	When you subscribe to a report or report view you are notified every time your subscription is delivered. If you view saved output and you want to know when there's a new version of the report, you can tap the Notify me button.
Team Content	Your organization's content is in the Team content folder. This is where you find reports, packages, dashboards, stories, models, and more.
Welcome Toolbar	The blue toolbar at the top of the Welcome Portal home page
Smart Search	A quick, easy way to find your items. You can search for text including table or column labels, XML report specifications, URL items, shortcuts, templates, and more. Search doesn't return archived content.