TxDMV RTS Training Guide for Working with Cognos Reports

April, 2015

Texas Department of Motor Vehicles

About This Guide

This Training Guide introduces the implementation of the Cognos enterprise reporting tool for the TxDMV Registration and Title System (RTS) reports generated daily, weekly, and monthly for activities in support of Texas motor vehicle registration and titling.

> At this time, some reports for activity performed through the RTS POS (for example, the BIAR, County Wide Payment Fees, and Title Package reports) are available only from **Reprint Reports** in the **Reports** event on the POS.

While providing explanatory information to acquaint you with the Cognos reporting tool and simple instructions for running, viewing, printing, saving, and emailing a report, this Training Guide is not intended to supplement other Cognos user guides and reference material, and is not an exhaustive guide about all the Cognos features. For more information, refer to the:

- **IBM Cognos Connection Online** help available from Cognos application pages via the Help link at the top of the page
- *IBM Cognos Connection User Guide* available at http://public.dhe.ibm.com/software/data/cognos/documentation/docs/en/10.2.1/ug_cc.pdf
- *IBM Cognos Information Center* available at http://pic.dhe.ibm.com/infocenter/cogic/v1r0m0/index.jsp

For questions or feedback related to the Cognos reporting tool, you can contact:

- Richard.Lelle@txdmv.gov (512-465-5614) – System Administrator
- Donna.Beasley@txdmv.gov (512-465-1307) – Security Administrator
- Mary.Eschenburg@txdmv.gov (512-465-1315) – Security Administrator

Content

Understanding Cognos

The Cognos reporting tool is a business intelligence reporting tool that transforms data collected in the TxDMV Registration and Title System (RTS) into usable information for your business decision making and analysis. This enterprise business intelligence system brings data together across the business areas to provide a single, integrated, and consistent view.

With Cognos, reports can be:

- Accessed from a central repository (Cognos Portal)
- Output with filtered information based on prompts
- Generated in various formats (like PDF and Excel)
- Grouped within folders by business area

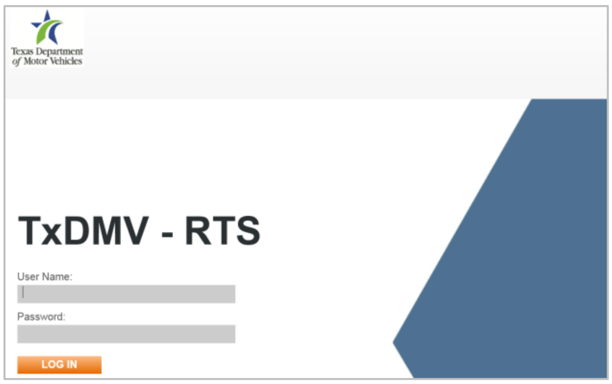
Cognos updates and refreshes most report data nightly, which means your reports are generated with the most up-to-date data.

Accessing Cognos from Your RTS Workstation

1. On the workstation desktop, click the **Cognos** icon.

   Note: If you are in the RTS POS, click (Minimize) to display your workstation desktop to get to the Cognos icon.

2. On the TxDMV - RTS **Log In** page:



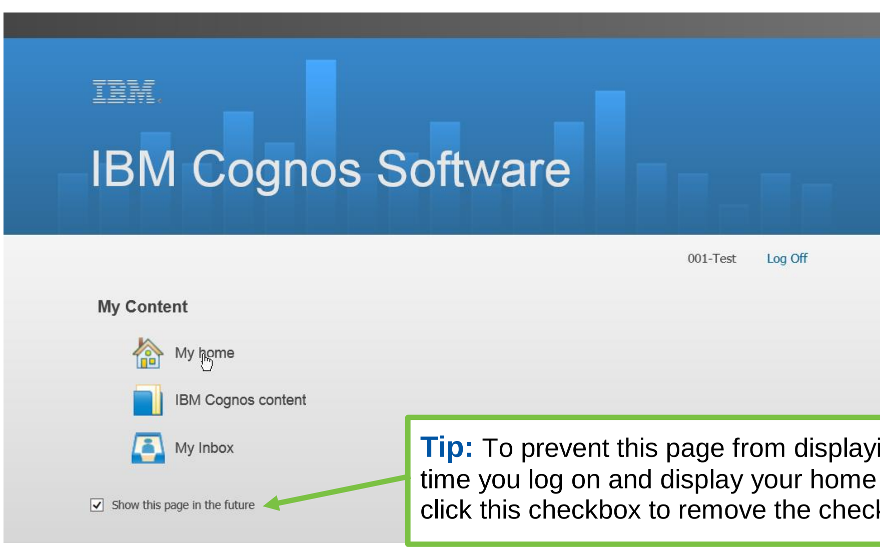
   a. For **User Name**, type in the user name supplied to you.

      Reminder: The user name you log in with controls the folders and reports you can see and work with. These fields are case-sensitive so you must type in the exact strings.

   b. For **Password**, type in the password string supplied to you for the user name you entered above.

   c. Click the **LOG IN** button.

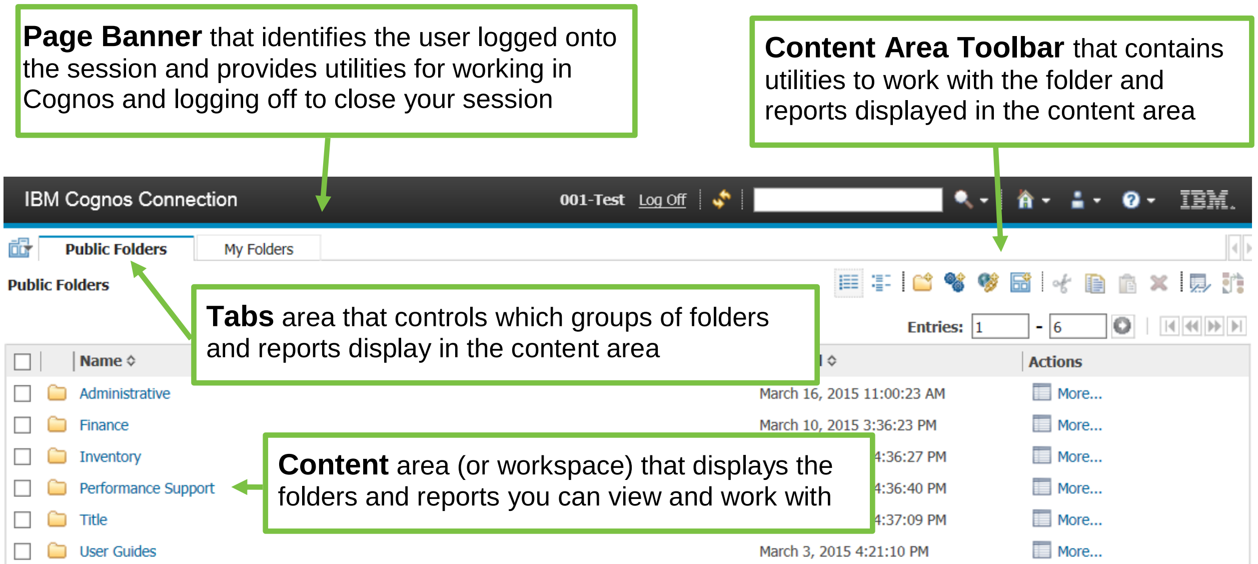
3. If the **IBM Cognos Software** page displays, click **My home**.



Tip: To prevent this page from displaying every time you log on and display your home page, click this checkbox to remove the checkmark.

Understanding the Cognos Reports Environment

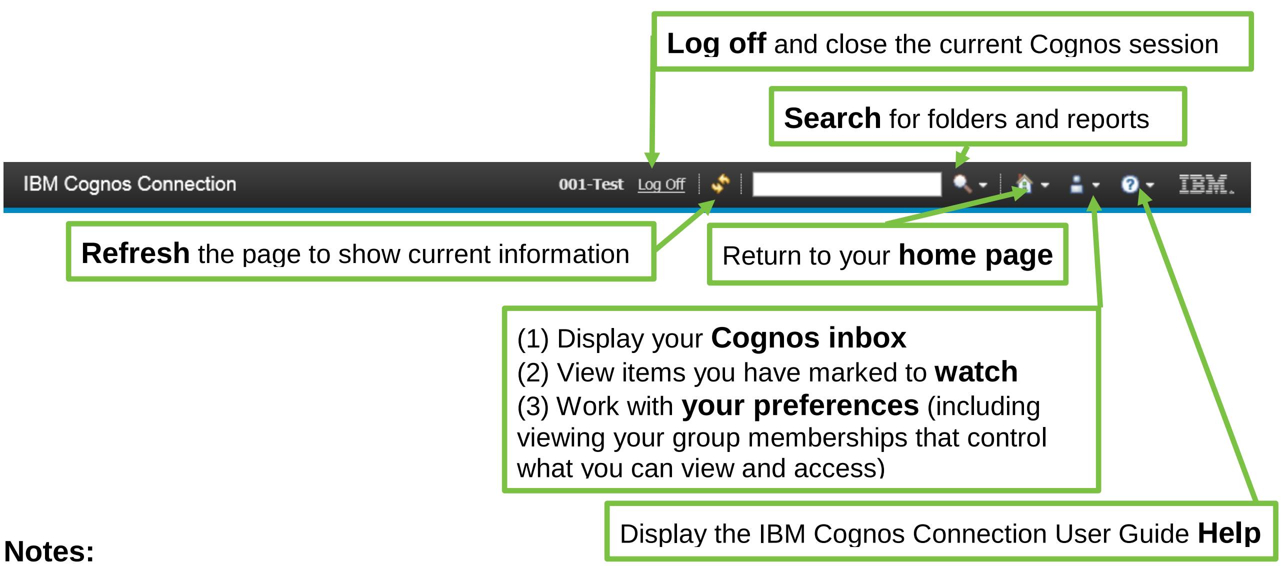
The Cognos home page displays with four distinct areas. (The Cognos Reports Viewer page looks different and is described on page 15.)



Each area is discussed in more detail in the following sections.

Understanding the Page Banner

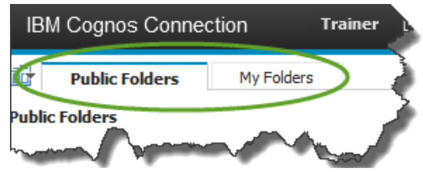
The banner that displays across Cognos pages provides options to:



Notes:

- If you belong to the group who works with the Cognos add-on applications, like Analysis Studio, the Launch drop-down menu displays on the banner.
- For assistance with these tools, click the help button from the page banner or the **Help** link on a page to display the IBM Cognos Connection User Guide.

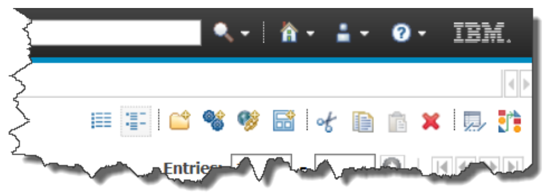
Understanding the Tabs Area



Cognos reports are organized into folders by functional business areas. The predefined folders with reports that you can access are displayed under the **Public Folders** tab. The structure and appearance of the **Public Folders** area is managed by the Cognos System Administrator.

You can store your commonly used or customized folders, reports, and report views for quick access in the **My Folders** tab area, which is your private area. You can also personalize the My Folders area using the tools on the toolbar.

Understanding the Content Area Toolbar Area



The Content Area toolbar provides the utilities for controlling the folder and reports that display in the content area. You can position your mouse pointer to hover over each tool to view the name of the tool.

In the **Public Folders** area, the list of folders and reports displays in (**List View**) but you can click the (**Details View**) to display additional information about the folders or reports. You can also view folder properties using (**Set Properties**). Note that many of the tools on the toolbar are available only to Cognos System Administrators.

In your **My Folders** area, you can click:

to create a new folder

to create an automated job that runs reports

to create a new URL to keep the files and web sites you use most frequently at your fingertips

to create a new tab area

to change the order of the items in the content area

Note: For more information about using the tools, click the from the Banner area.

To work with the folders and reports that display in the pane, you can also click the checkbox of the folder/report and then click:

(**Copy**) to duplicate the item on the clipboard so you can place it elsewhere

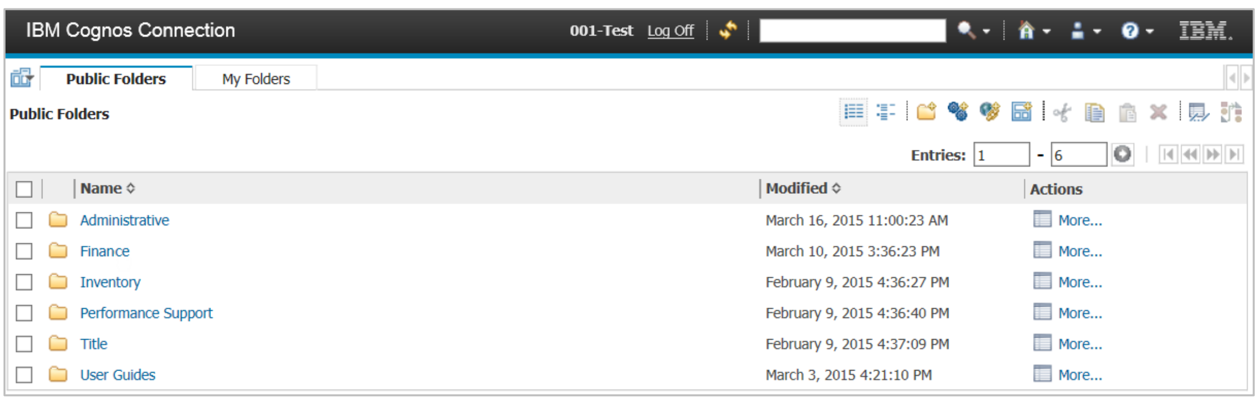
(**Cut**) to remove the item from the list and place it on the clipboard so you can place it elsewhere

(**Paste**) to place a copied or cut item in the pane at the cursor point

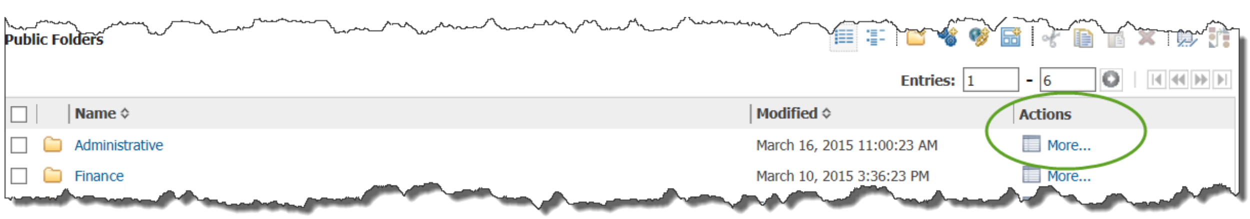
(**Delete**) to permanently remove the item

Understanding the Content Panel

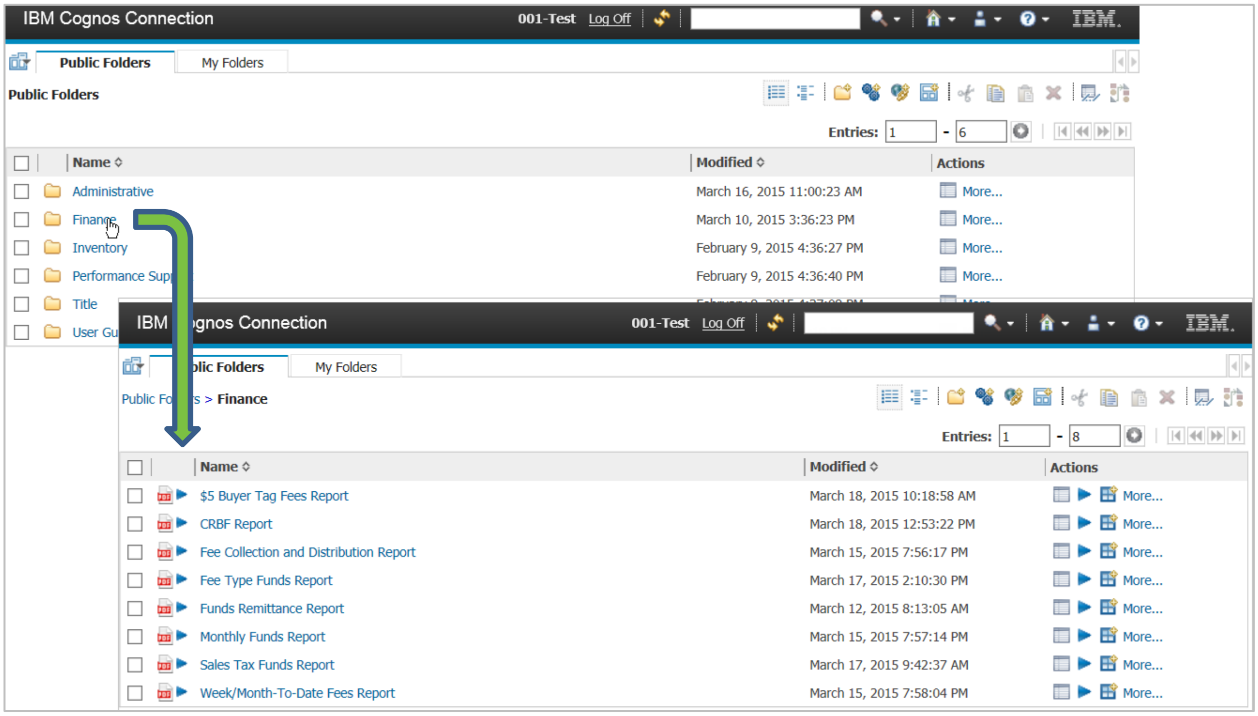
The Content panel displays the folders of reports grouped together by functional business area. The system displays the folders available to you based on your permissions and hides the folders you do not have the appropriate permissions to view.



The folders display with their name, last date modified, and an **Actions** toolbar to enable you to set properties on the folder and **More…** (options, like viewing your permissions or creating a bookmark to the folder).



Opening a folder in the content panel displays the reports stored within it.

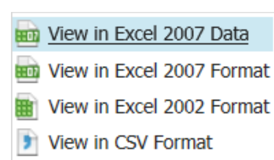


The list shows the name of each report along with the date it was last modified and its **Actions** toolbar (explained on the next page).

For reports, the default format of the report is also identified:

indicates a **PDF**, which is the easiest type of report to view, print, or send. The majority of the reports are generated as PDFs by default.

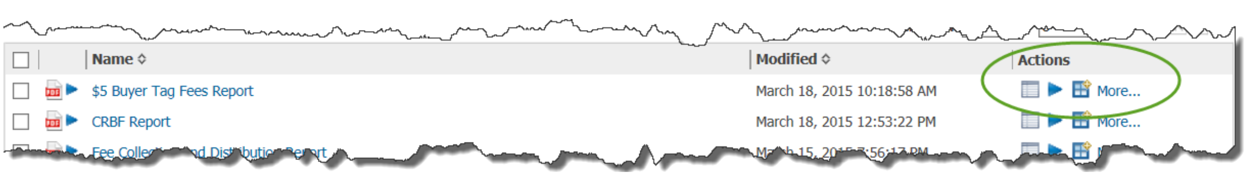
indicates an **Excel** file, such as a spreadsheet, data file, or a CSV file (that you can save as a flat data file without any formatting). You can manipulate the data in the Excel files-especially if you need to combine it with other information.



indicates an **HTML** file you can use to make the report available for email or an online page in an electronic document. Note that only the current page of the HTML file displays onscreen in the Cognos Viewer.

indicates an **XML** file that you can use to import the data into another system.

The **Actions** toolbar for working with the report displays to the right of each report.



From this toolbar, you can click:

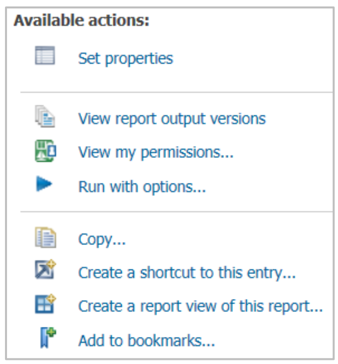
(**Properties**) to view the properties of the report such as the language, name, run history, created date, and modified date. If a report is in your private tab (like My Folders), you can modify these properties and add information, like a screen tip.

Note: Adding a screen tip to a report that displays when you hover over the report may make it easier to identify the purpose of the report in a long list of similar reports.

(**Run Report**) to display the options and prompts pages to set new values for the report instead of using the default or previously defined and saved options.

(**Create View**) to generate a snapshot of specific data and save it to My Folders or another private tab area you have created.

More... (**More Options**) to display additional actions



(**View Outputs**) to display any previously saved outputs of this report.

Note: This icon only displays if this report has been run at least one time and the output has been saved.

Running Reports

Reports containing much of the daily, weekly, and monthly information you need have been predefined and set up in Cognos ready for you to click and run.

The system updates and refreshes report data nightly to provide you with the most up-to-date information when you run it.

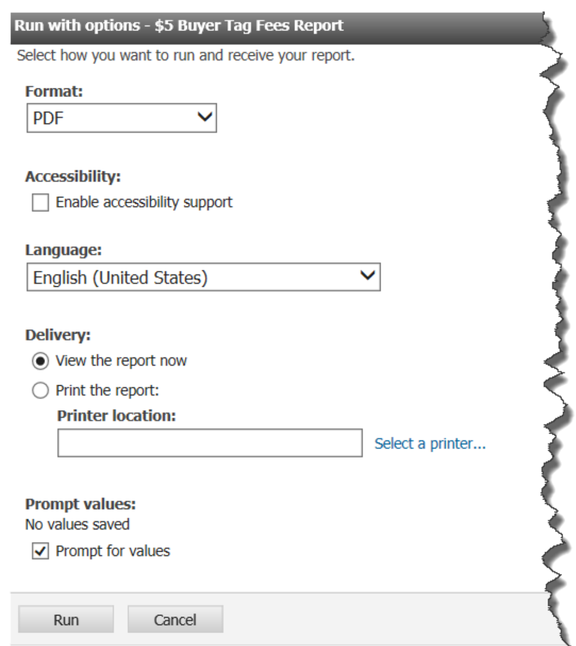
The reports have:

- **Options** that you can use as defined or choose to specify when running the report (including the delivery method of the report)
- **Prompts** for values (such as dates and fee types) that you select at runtime. Some values are required and must be confirmed at runtime while others remain as the set default or last saved value if you select to run the report as is.

Understanding the Report Options

The report options include specifying that the:

- **Format** of the output should be PDF, one of the Excel formats, HTML, or XML (Note that if you change the format of a report originally set for PDF to one of the Excel formats, the report may open and display directly in Excel.)
- **Accessibility** support should be enabled to display the output in larger font during this session
- **Language** in which screen prompts and text are displayed should be changed from English to another option
- **Delivery** (***Print the report*** *is not available at this time.*)
- **Prompt values** should display for all prompts (not just required ones)



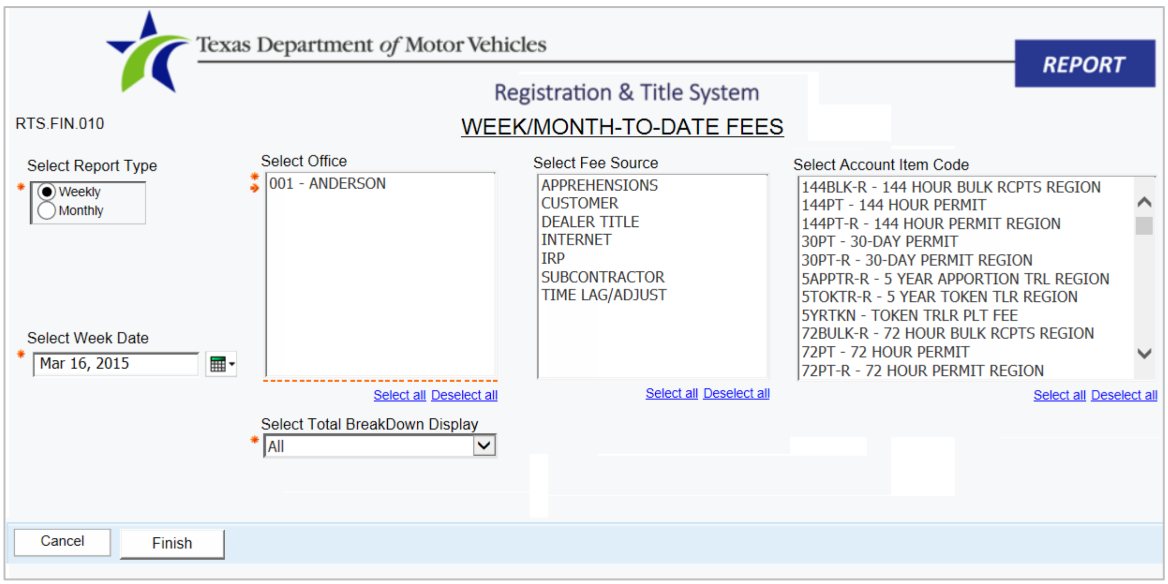
Understanding Report Prompts

The Prompts page that displays when you run a report contains elements (for example, dates, fee types, or item codes) that need a value supplied in order to produce the intended results of the report. The prompts that display vary depending on the type of information necessary for the report.

You may be able to use default values supplied for a prompt when the report was designed or you may need to specifically select a value (like a date) each time the report is run.

The prompts include calendar selection displays, selection lists, drop-down lists and option buttons. Search prompts are also used to help you locate information already defined in the database instead of making you remember it.

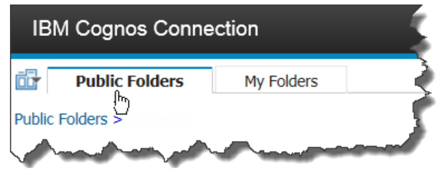
An example of a prompt page displays below.



For more detailed information about report prompts, refer to Appendix A Understanding Report Prompts on page 23.

Running a Report with Default Options

1. In the home page tab area, click the appropriate tab (such as the **Public Folders** tab for predefined reports or **My Folders** for your reports).



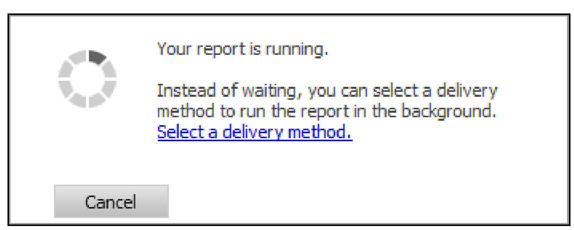
2. In the content area, click the appropriate folder (such as Finance).

3. From the list of reports displayed, click the report name link.

4. On the **Prompts** page, enter or select the appropriate information for each prompt value you want to change and then click the **Finish** button.

   Note: You must select or enter information for prompts marked with (asterisk).

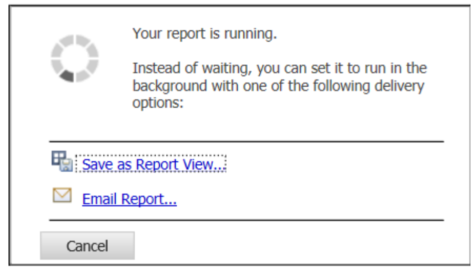
5. When the **Your report is running** pop-up displays, you can wait for the report to finish running and display onscreen.



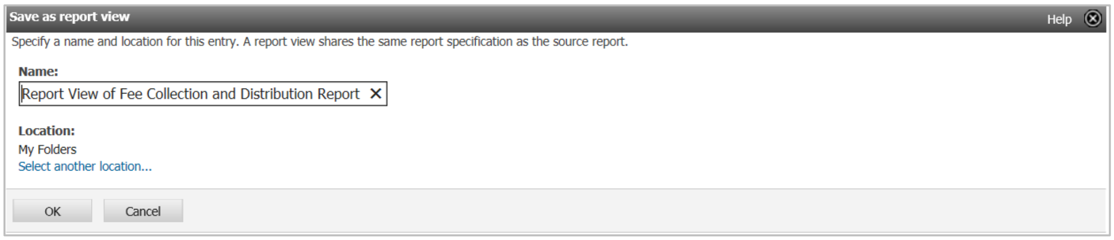
   Or, click the **Select a delivery method** link and to:

   - Save the report as a view in your **My Reports** folder:

a. From the options displayed, click [Save as Report View](#).



b. On the **Save as report view** page:

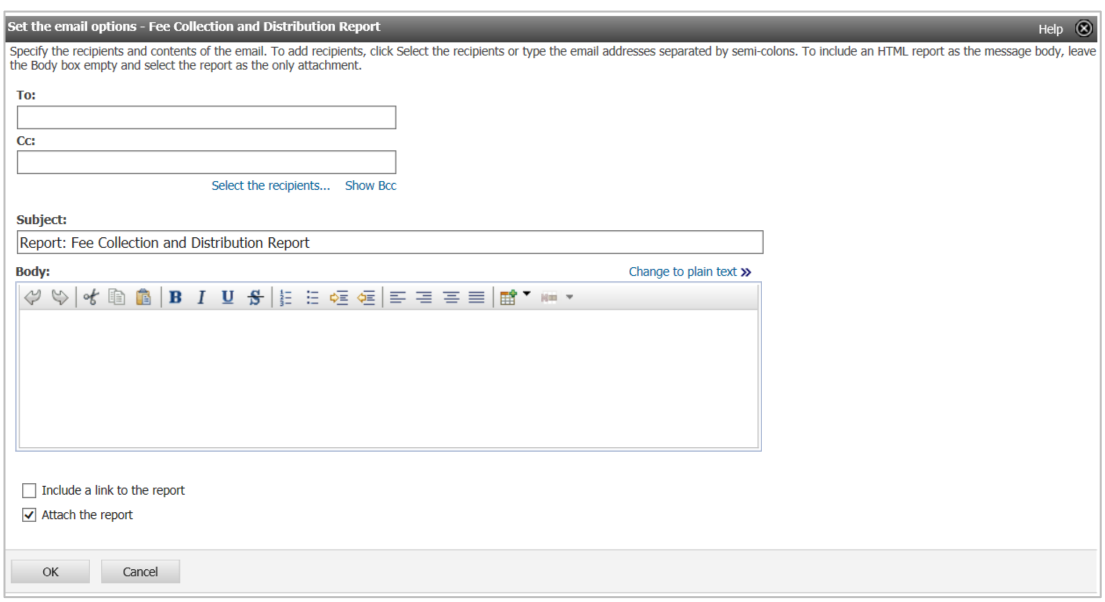


1) For **Name**, type in the name for this view.
2) For **Location**, click the Select another location link, navigate to the folder in which to store it, and then click the **OK** button.
3) Click the **OK** button.

- Email the report to yourself:

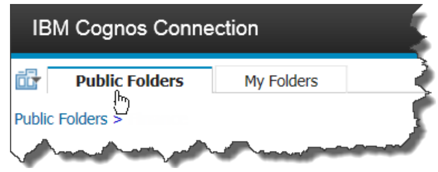
c. From the options displayed, click [Email Report](#).

d. On the **Set the email options** page, supply the necessary information and click the **OK** button.



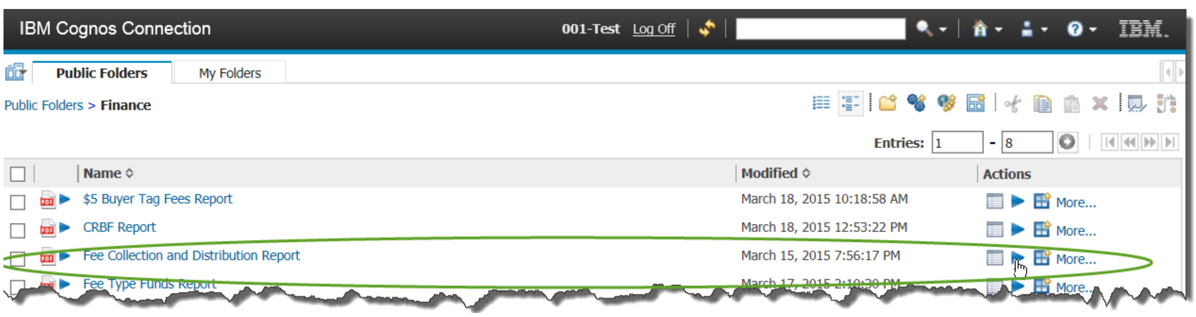
Running a Report with New Options

1. In the home page tab area, click the appropriate tab (such as the **Public Folders** tab for predefined reports or **My Folders** for your reports).

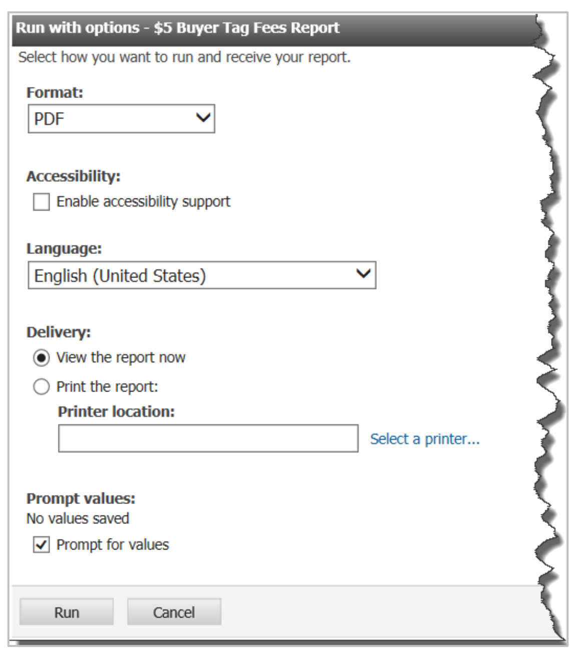


2. In the content area, click the appropriate folder (such as Finance).

3. From the **Actions** toolbar of the report, click (Run with options).



4. On the **Run with options** page, for:
   - **Format**, click the appropriate output format option from the drop-down list (Note that if you change the format of a report originally set for PDF to one of the Excel formats, the report may open and display directly in Excel.).
   - **Accessibility**, click the checkbox to enable the accessibility assistive technology features (such as alternate text to be read by screen readers or enlarged text) when this report is displayed onscreen after running. (Note this change affects the current session only.)



- **Language**, click the appropriate option in the drop-down list in which to display the report prompt page and report output.

- **Delivery** (***Print the report*** *is not available at this time*)

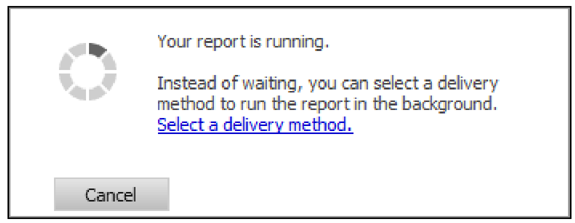
- **Prompt for values**, click the checkbox to remove the checkmark and display only the required prompts.

5. Click the **Run** button.

6. When the report prompts page displays, select the information for each prompt value you want to change and click the **Finish** button.

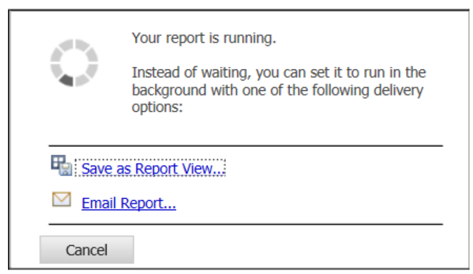
7. When the **Your report is running** pop-up displays, you can wait for the report to finish running and display onscreen.

   Or, click the **Select a delivery method** link and to:

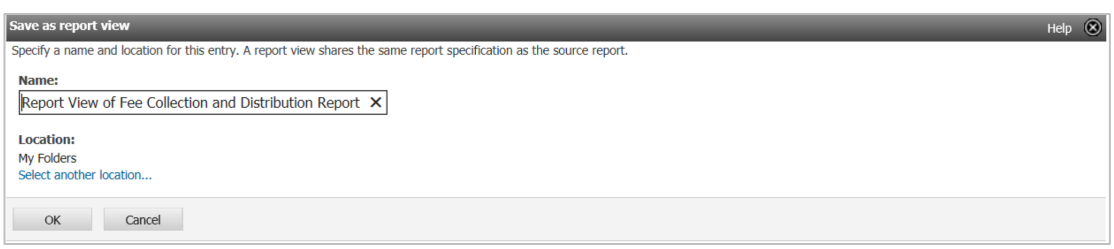


- Save the report as a view in your **My Reports** folder:

  a. From the options displayed, click **Save as Report View**.



  b. On the **Save as report view** page:



    1) For **Name**, type in the name for this view.

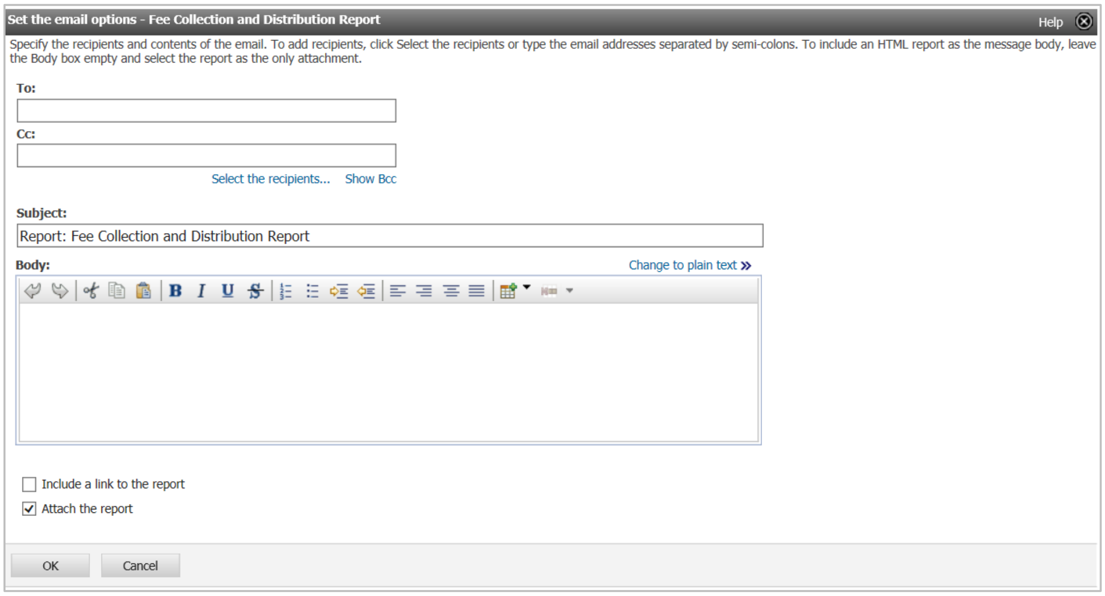
    2) For **Location**, click the Select another location link, navigate to the folder in which to store it, and then click the **OK** button.

    3) Click the **OK** button.

- Email the report to yourself:

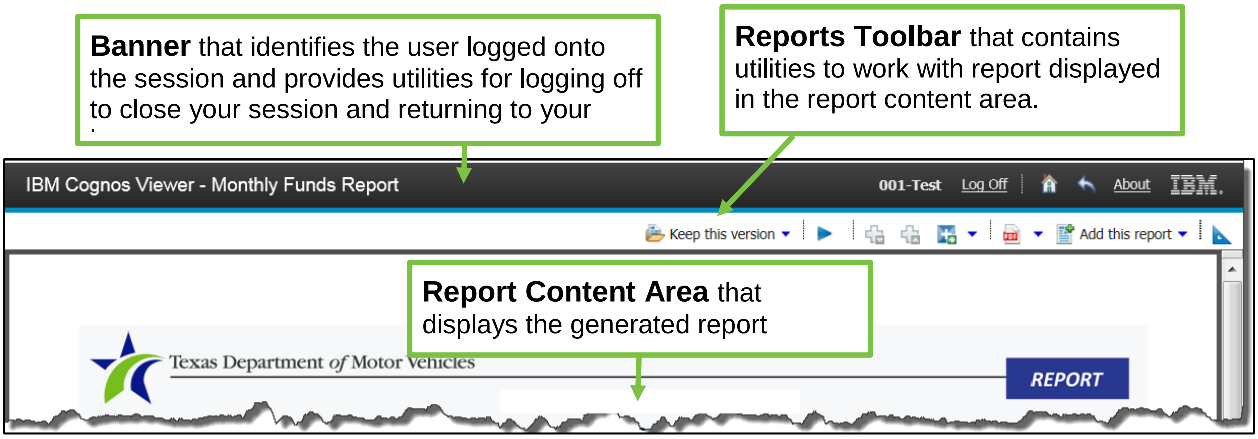
a. From the options displayed, click **Email Report**.

b. On the **Set the email options** page, supply the necessary information and click the **OK** button.



Viewing Generated Reports

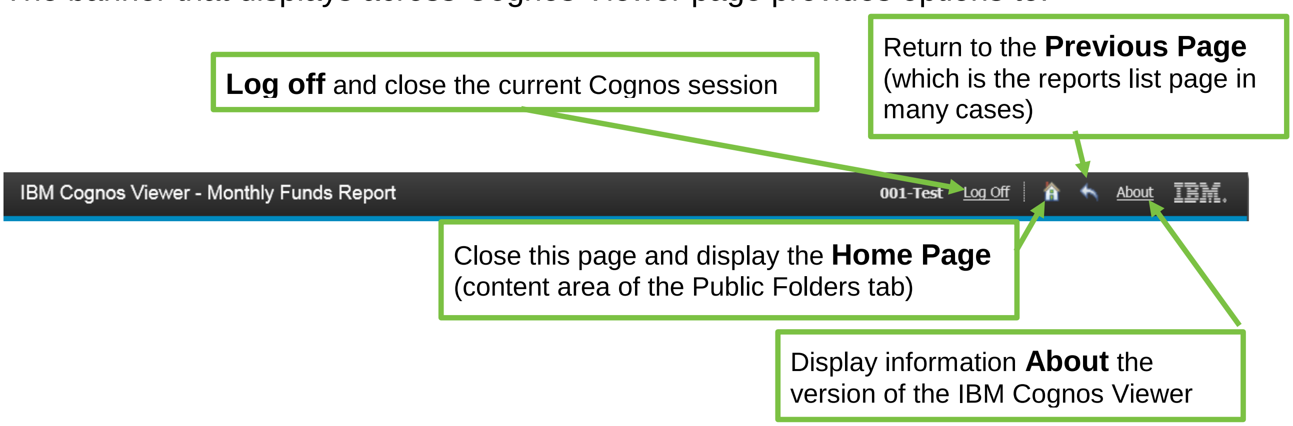
The Cognos Viewer page for reports displays with a banner, toolbar, and report content area that is different than the home page.



Note: Reports that display as PDFs also have an additional toolbar for printing with the report (as explained later).

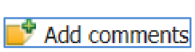
Understanding the Cognos Viewer Banner

The banner that displays across Cognos Viewer page provides options to:



If you are in a report that has been run more than one time and saved to your My Folders area, the following two tools may also display:

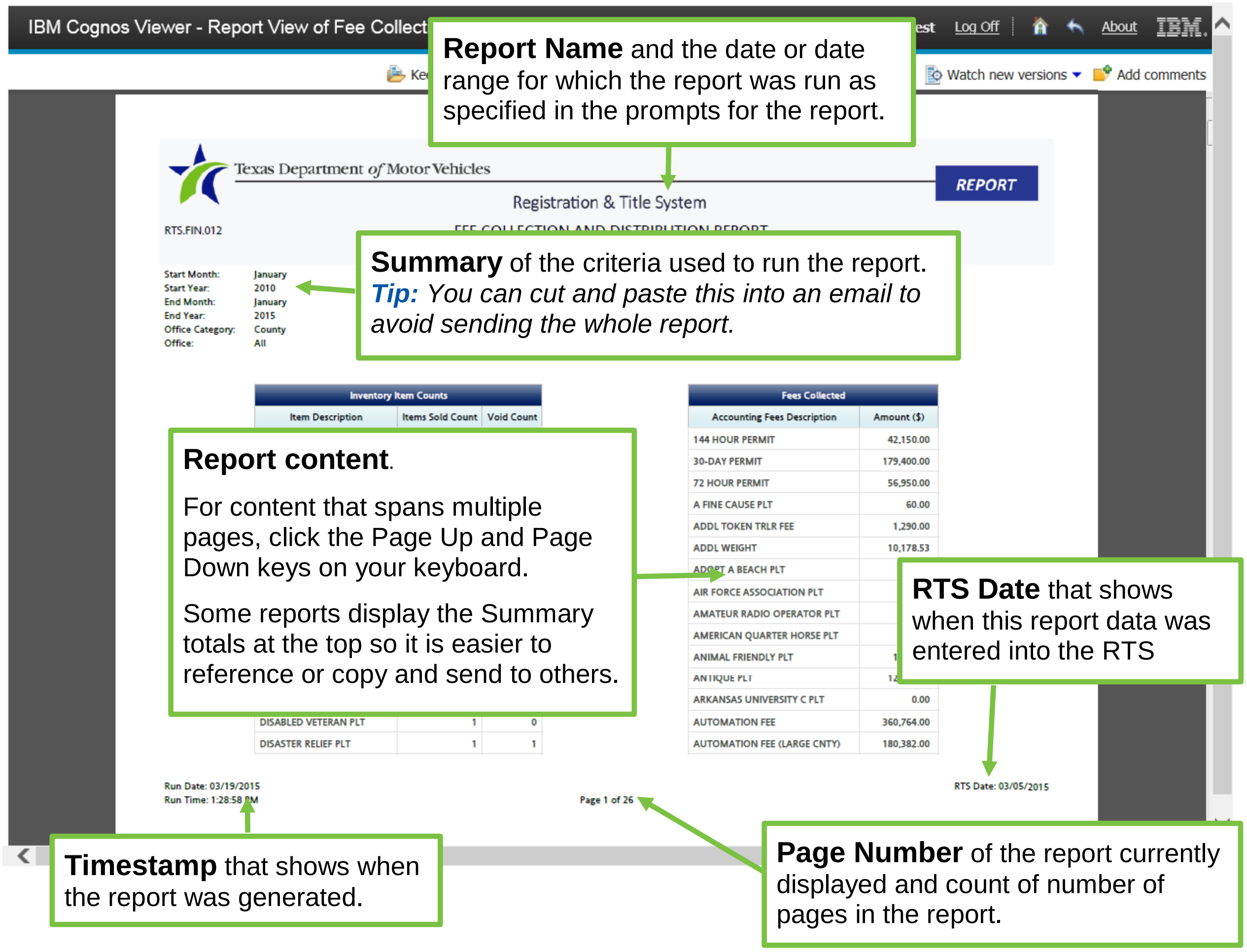
enables you to get any new versions of the report that have been generated.



enables you to annotate the report.

Understanding the Reports Content Area

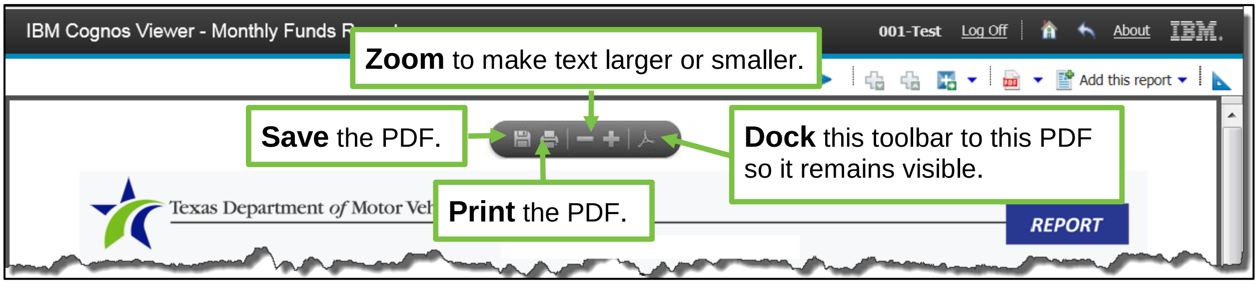
In the Reports Content Area, the report displays in its requested format.



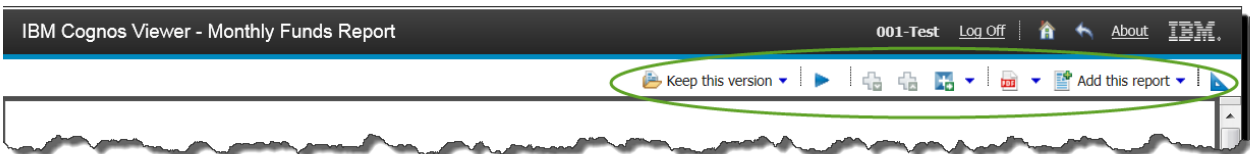
TIP: To locate something specific on a report page, you can perform a typical web page search by pressing the Ctrl + F keys on your keyboard and providing a keyword (or phrase) in the Find pop-up.

If the report is generated as a PDF, the Adobe Toolbar displays at the top of the content area.

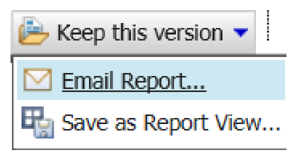
Using the Adobe Toolbar



Understanding the Reports Toolbar



These utilities enable you to:



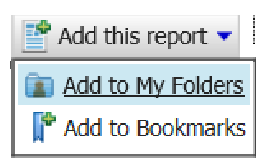
Keep this version by emailing it to yourself or saving it as a report view

Run the report again

Drill Up and Down through report information (if the information is arranged in layers with links to the layers)

Display links to additional resources that may be of interest

Change the format of the report in one of the other available formats



Add this report as a report view in a folder in your My Folders private area (or another private tab area) or add a bookmark to this report in your My Folders

Printing Reports

You can print hard copies of reports that you have generated or are viewing in PDF or one of the Excel formats.

For the best printing results, it is recommended that the report is printed in PDF format.

Printing a Report as a PDF

- To change a report from another format to a PDF, click the format drop-down from the Cognos Viewer toolbar and click (PDF).
- From the Adobe toolbar, click (Print) and follow the usual process for your printer.

Printing a Report in One of the Excel Formats

Follow the standard print procedures for printing files from Excel (**File > Print**). Note that the Print Preview displays how the report will look in the format you have selected (data, spreadsheet, or CSV).

Printing a Report Generated as an HTML File

Only the first page of the report displays online in the Cognos Viewer. You must view the source, copy it, and paste it in a file that can be saved as HTML.

Printing a Report Generated in XML

XML code can be copied and pasted into a source file. Although it displays in the Cognos View, it will not print from the Cognos Viewer.

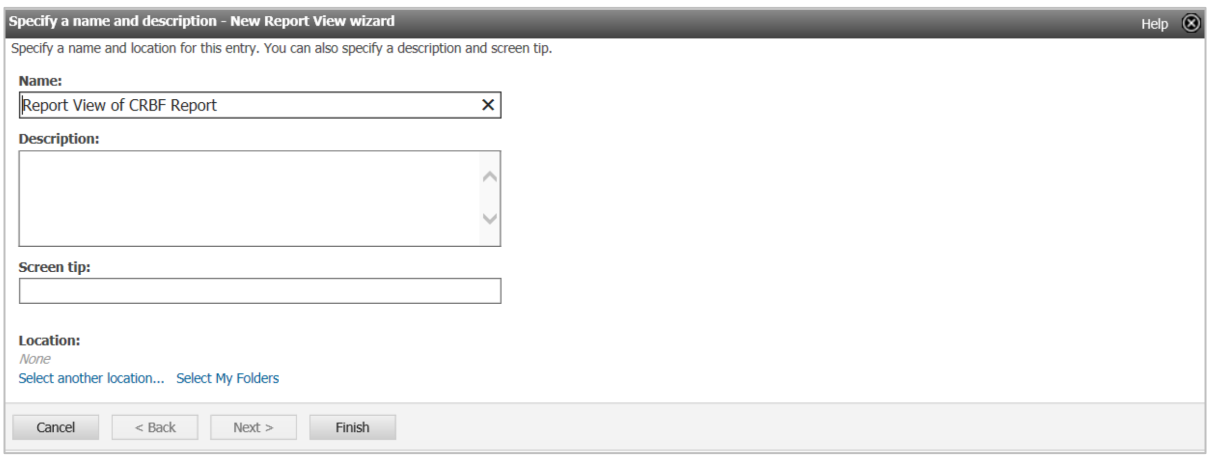
Saving Reports

You can simply save a copy of a report with its static data or you can save a dynamic report view that can be run again with the same options and prompt values to update it. You can save a view from the:

- **Actions** toolbar of the report before running it
- **Cognos Viewer** toolbar inside the report after running it

Saving a View from the Actions Toolbar of the Report

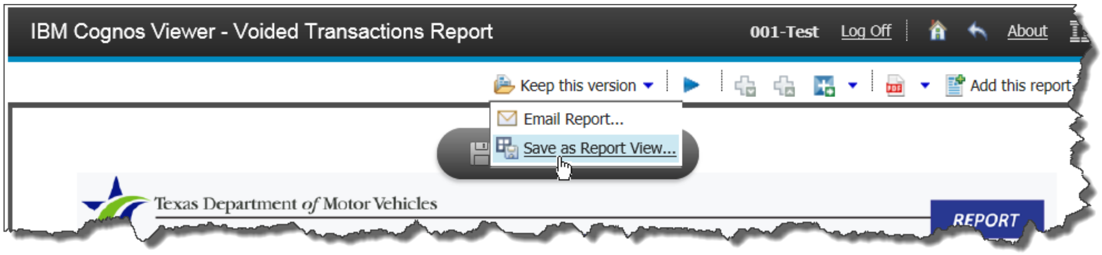
1. From the **Actions** toolbar of the report, click  (**Create View**).
2. On the **New Report View wizard** page:



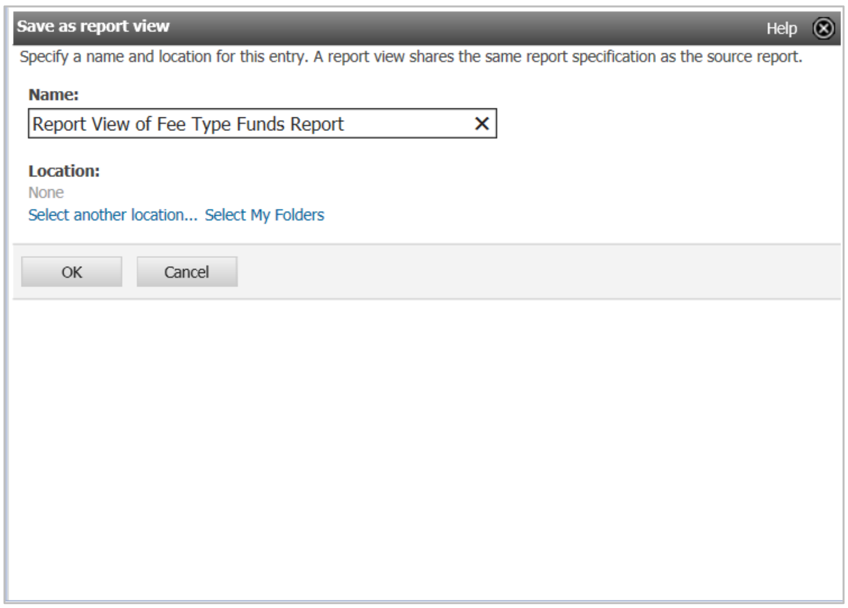
   a. For **Name**, type over the entry to enter a label that will help you identify this view when you see it in the list of report views on the My Folders tab.
   b. For **Description**, type a phrase about the data contained in the report that will help you identify this view when you see it in the list of report views on the My Folders tab (when the Detailed View is selected)
   c. For **Screen tip**, type a phrase about the data contained in the report that will help you identify this view when you hover over this report in the list of report views on the My Folders tab
   d. For **Location**, click **Select My Folders**.
   e. Click the **Finish** button.

Saving a View from Inside a Report

1. On the toolbar at the top of the page of the open report, click the **Keep this version** drop down and click **Save as Report View**.



2. On the **Save as report** view page:



   a. For **Name**, type in a label to help you identify the purpose of this report view when you view the folder in which it is stored.

   b. For **Location**, click **Select My Folders** from the options displayed (or, if you have defined other private tabs for yourself, click the **Select another location** and navigate to the appropriate tab name.)

   c. Click the **OK** button.

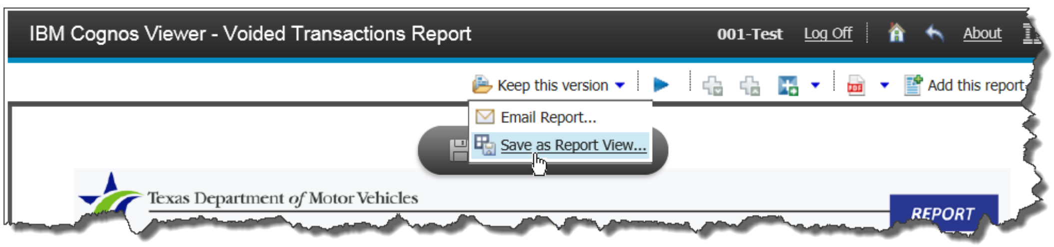
Emailing Reports

You can attach the report to an email and send it to yourself and others who need the information.

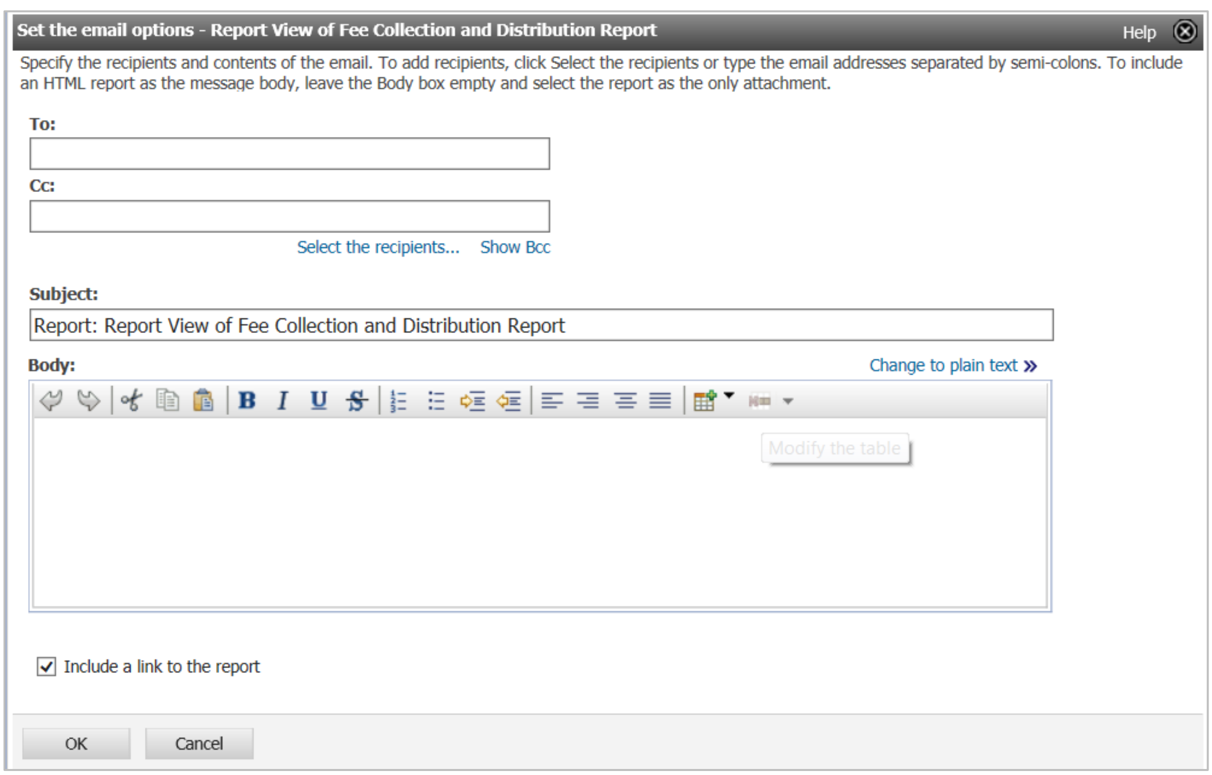
Although the Email options contain the option to link to the report, you can link the report only if the email recipients have access to Cognos.

To preserve the data as it was collected, you should attach the report.

1. From the Cognos Viewer toolbar within the open report, click Keep this version and click **Email Report**.



2. On the **Set the email options** page, to address this email to the people who:



- Should receive the report, for **To,** type the full email address of the report recipient. If entering multiple addresses, separate each address with a semicolon.

- Need to know that this report was emailed to the people in the To: area, for **Cc:**, type the full email address of these recipients. If entering multiple addresses, separate each address with a semicolon.

3. For **Subject**, leave the default or type a custom label that will display in the Inbox of the email recipients.

4. For **Body**, type in the information you want to include to the report recipients and if sending this email in:

    - HTML format, use the tools on the toolbar to work with the content to format it (make words bold, add numbers or bullets, and so on).

    - Plain text with no formatting, click **Change to plain text >>** at the top right of the area.

5. Click the **OK** button.

Appendix A Understanding Report Prompts

The Prompts page that displays when you run a report contains elements (for example, dates, fee types, or item codes) that need a value supplied in order to produce the intended results of the report.

You may be able to use default values supplied for a prompt when the report was designed or you may need to specifically select a value in order to run the report each time (for example, a date). You can also save some of the prompt value settings you make to be used each time the report is run.

Prompts with the (orange asterisk) or (orange asterisk with an arrow below it) displayed to their left require you to set a value.

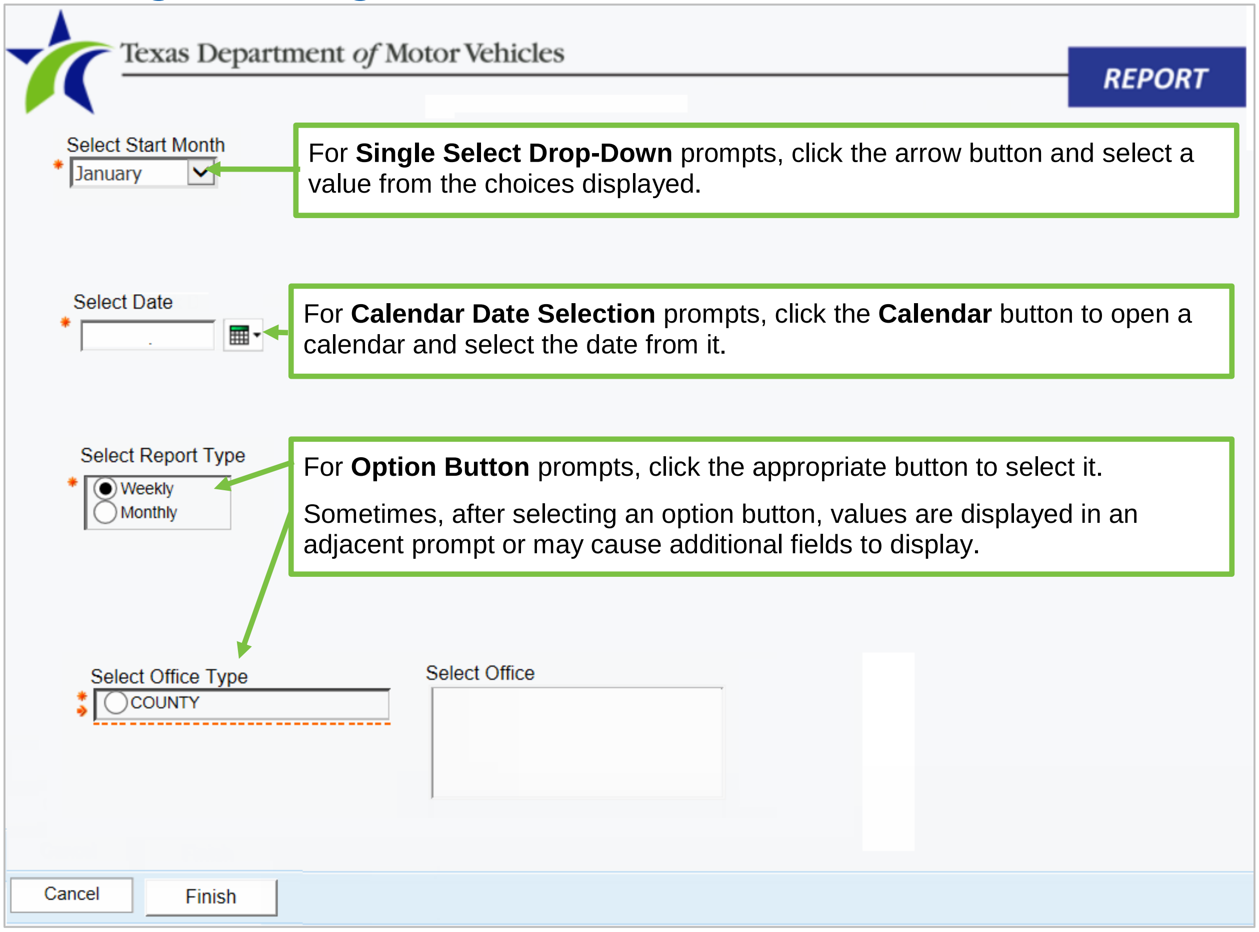
In some cases, you may be required to click the Refresh or Refresh Office buttons in order to display values in an adjacent list.

The prompt types you will see for your reports include:

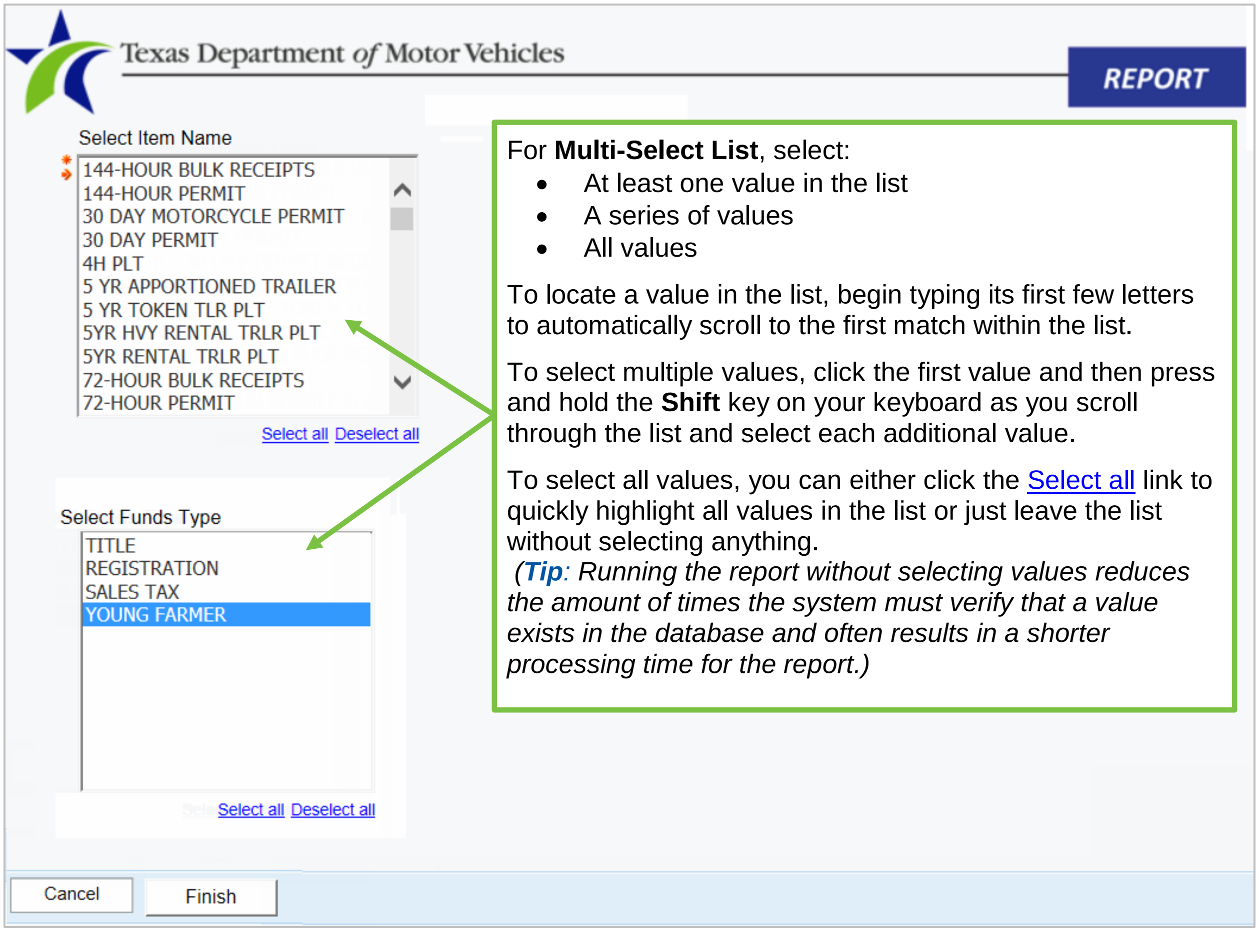
- Single-select list prompts where you can select one value (mostly date and date range details, including the calendar pop-up for selecting the date)
- Multi-select list prompts where you can select at least one value but may select more
- Search prompts for locating a series of values and selecting the most appropriate values from the results displayed

Examples of these prompts are described in the following sections.

Working with Single-Select Lists



Working with Multi-Select Lists



For **Multi-Select List**, select:

- At least one value in the list
- A series of values
- All values

To locate a value in the list, begin typing its first few letters to automatically scroll to the first match within the list.

To select multiple values, click the first value and then press and hold the **Shift** key on your keyboard as you scroll through the list and select each additional value.

To select all values, you can either click the Select all link to quickly highlight all values in the list or just leave the list without selecting anything.
*(**Tip**: Running the report without selecting values reduces the amount of times the system must verify that a value exists in the database and often results in a shorter processing time for the report.)*

Working with Search Prompts