The RTS Refactoring Webinar - Reports

Tax Assessor-Collectors and Deputies,
Continuing Education Credit may be considered for your participation.

Log your information on the TxDMV website on the TAC Hub, by clicking the Continuing Education Credit Icon.
Reference materials for Cognos training is on the TxDMV TAC Hub

- Job Aids
- Emails
- Webinars, Guides & FAQs
- FAQs
  - Cognos Reports
  - RTS Point of Sale
- Guides
  - Training Guide for Working with Cognos Reports
- Presentations
  - Working with Cognos Reports
  - RTS Refactoring Project and Cognos
- Webinars
  - RTS Refactoring Project and Cognos
  - Cognos Report Training
Welcome
RTS Refactoring Project
Working with Cognos Reports

Texas Department of Motor Vehicles
Agenda
Agenda

- Objectives
- Introduction to Cognos
- Advantages of Cognos reports
- Walk-through of Cognos
- List of resources
- Questions and Summary
Training Objectives
Objectives

The purpose of the Cognos Reports training is to provide tailored instruction on how to access and use Cognos to generate reports.

Upon completion of this course, you should be able to:

- Maneuver through Cognos
- Run reports using Cognos
- Distribute reports
Introduction to Cognos
Enterprise Reporting (Cognos)

**Goal:** Update & optimize reporting capabilities

<table>
<thead>
<tr>
<th>Current System</th>
<th>Benefits of the New Enterprise Reporting System</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Reports are automatically printed on a predetermined schedule</td>
<td>• You can access reports on demand via Cognos</td>
</tr>
<tr>
<td>• Reports cannot be exported to other formats</td>
<td>• You can export reports in different formats (e.g. PDF, Excel), print to a local or network printer, save an electronic copy, and email reports to another user</td>
</tr>
<tr>
<td>• Reports are limited to a predetermined date range</td>
<td>• You can select specific date/date ranges</td>
</tr>
<tr>
<td>• Reports cannot be filtered for specific items</td>
<td>• You can filter or search for specific items within a report (e.g. fees, funds, transaction IDs, etc.)</td>
</tr>
<tr>
<td></td>
<td>• Some reports will be consolidated for your convenience (e.g. day, week, month fees reports)</td>
</tr>
</tbody>
</table>

Affects mainframe download reports only

TxDMV Refactoring
Cognos Basics
Accessing Cognos from your RTS Workstation
Accessing Cognos

Cognos can be accessed by selecting the Cognos icon on the desktop.
Accessing Cognos

Options available are based on log in permissions.

Click My Home to go to your Home Page.

Click the box to skip this screen in the future
The Home Page

Banner identifies who is logged into Cognos and provides utilities for working in Cognos.

Toolbar to work with folders and reports in the content area.

Content area with the folders you can view and work with.

Tabs controlling which folders and reports display.
Running Reports – Finding Reports

To run a report begin on the home page:
1. Select the appropriate tab containing the list of folders
2. Click on the folder that contains the report
3. From the list of reports, click on report name
Running Report - Prompts

Report options for a Finance Report (as an example)

- Many option fields are setup to select multiple items from the list (Cntrl+click)
- Fields with a red asterisk are required fields

For more detailed information about report prompts, refer to the Training Guide.
Understanding the Reports Toolbar

Within a report, the following report options are available in the top-right corner of the report:

- **Email, or save report view**
- **Rerun the report**
- **Drill up/down through information**
- **Export to different format**

![IBM Cognos Viewer - Monthly Funds Report](image)
Using the Adobe Toolbar

- **Save** the PDF.
- **Print** the PDF.
- **Dock** this toolbar to this PDF so it remains visible.
- **Zoom** to make text larger or smaller.
Viewing Generated Reports

Here is an example of a report in PDF view.

![Report Example]

- **Summary of criteria used**: (some reports will display summary totals)
- **Date & time report was generated**
- **Summary report information**
- **Detailed report information**
Email a Report

Set the email options - Fee Collection and Distribution Report

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To:

Cc:

Select the recipients... Show Bcc

Subject:
Report: Fee Collection and Distribution Report

Body:

Include a link to the report
Attach the report

OK Cancel
Saving a Report View

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

**Name:**
Report View of Fee Type Funds Report

**Location:**
Select My Folders

Save to “My Folders” tab
Printing a Cognos Report

Tip: To avoid printing on the "500" paper inventory, you can add plain paper to Tray 2 of the RTS printer or pull down Tray 1 (the manual feed tray) and load it with plain paper.

1. In the Cognos Viewer page, click the (print) icon from the Adobe toolbar at the top of the displayed report. If the report is in your My Folders tab, click the report name to display it in the Cognos Viewer and then click the icon.

2. On the Print pop-up to send the report to:
   - Default Tray on your RTS printer, click RTS-Tray 2 from the Printer drop-down list and then click the Print button.
   - Manual Feed Tray of your RTS printer, click RTS-Tray 1 from the Printer drop-down list and then click the Print button.
Running a Cognos Report

To run a report with its default options and display the finished report onscreen:
1. Log in to Cognos.
2. In the Public Folders tab area of the Cognos Connection home page, click the appropriate folder.
3. In the report list, locate the report and click its name.
4. On the report prompt page, select the appropriate information and click the Finish button.
5. When the report finishes and displays onscreen, you can print it or save it to your My Folders area.

Note: To return to the Cognos work area, click (Home page) from the banner at the top of the page.

To run the report and email it report to yourself:
1. Log in to Cognos.
2. In the Public Folders tab area of the Cognos Connection home page, click the appropriate folder.
3. In the report list, locate the report and click its name.
4. On the report prompt page, select the appropriate information and click the Finish button.
5. As the report runs, click the Select a delivery method link on the prompt displayed.
6. From the options displayed, click the Email Report option.
7. On the Set the email options page, fill in your email address and click the OK button.

Note: To return to the Cognos work area, click (Home page) from the banner at the top of the page.
Cognos Report Tips

- View reports on the Cognos Viewer page. The Report View page displays with a banner, toolbar, and report content area different than the Home Page.

- Print hard copies of reports that you have generated or are viewing in PDF or one of the Excel formats.

- 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.

- Attach the report to an email and send it to yourself and others who need the information or send a link to other Cognos users.
Cognos Reference Material

This following is available on the TAC Hub

- Training Guide for Working with Cognos Reports
- Guide for Running Daily/Weekly/Monthly Reports
- Job Aids
### Reference Material Example 1

#### Where are my reports that used to print automatically?

**For County Offices**

<table>
<thead>
<tr>
<th>To locate information from the former:</th>
<th>In Cognos, go to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprehension Report (4672)</td>
<td>Finance &gt; Funds Remittance Report¹</td>
</tr>
<tr>
<td>Funds Remittance Report (4604, 4605)</td>
<td>Finance &gt; Funds Remittance Report</td>
</tr>
<tr>
<td>Funds Summary² (4603)</td>
<td>Finance &gt; Fee Type Funds Report</td>
</tr>
<tr>
<td>Funds Transactions² (4602)</td>
<td></td>
</tr>
<tr>
<td>Inventory Transactions (4702)</td>
<td>Inventory &gt; Inventory Transactions Report</td>
</tr>
<tr>
<td>Monthly Funds Report</td>
<td>Finance &gt; Monthly Funds Report</td>
</tr>
<tr>
<td>Sales Tax Penalty (4602)</td>
<td></td>
</tr>
<tr>
<td>Young Farmer (4802)</td>
<td></td>
</tr>
<tr>
<td>Registration Emissions Fee (4802)</td>
<td></td>
</tr>
<tr>
<td>Month-To-Date Fees Report (458a2/458a3)</td>
<td>Finance &gt; Week/Month-to-Date Fees Report</td>
</tr>
<tr>
<td>NMVTIS Inquiry Report (8864)</td>
<td>Title &gt; NMVTIS Inquiry Error Report</td>
</tr>
<tr>
<td>Production Report (9402)</td>
<td>Performance Support &gt; Employee Transaction</td>
</tr>
<tr>
<td>Sales Tax Emission Fee 1% (4802)</td>
<td>Finance &gt; Monthly Funds Report</td>
</tr>
<tr>
<td>Sales Tax Report (4802)</td>
<td>Finance &gt; Monthly Funds Report</td>
</tr>
<tr>
<td>TERP Fee (4802)</td>
<td>Finance &gt; Monthly Funds Report</td>
</tr>
<tr>
<td>Texas Mobility Fund Fee (4802)</td>
<td>Finance &gt; Monthly Funds Report</td>
</tr>
<tr>
<td>Voided Transaction Report (5152)</td>
<td>Administrative &gt; Voided Transactions Report</td>
</tr>
<tr>
<td>Week-To-Date Cash Drawer (4552)</td>
<td>Finance &gt; Week/Month-to-Date Fees Report</td>
</tr>
<tr>
<td>Week-To-Date Fees Report (458a2/B3/C4)</td>
<td>Finance &gt; Week/Month-to-Date Fees Report</td>
</tr>
<tr>
<td>Year-To-Date Reg &amp; Title Summary (8352)</td>
<td>Finance &gt; Fee Collection and Distribution Report</td>
</tr>
<tr>
<td>Special Plates County Invoice (3564)</td>
<td>This report will continue to be downloadable to your printer as it is today until available in a future Cognos release.</td>
</tr>
<tr>
<td>County IRP Transmittal Invoice (7472)</td>
<td>This report will continue to be downloadable to your printer as it is today until available in a future Cognos release.</td>
</tr>
</tbody>
</table>

#### To print the:

<table>
<thead>
<tr>
<th>In the POS, go to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch Inventory Action – BIAR (9901)</td>
</tr>
<tr>
<td>Completed Set Aside Transactions (9021)</td>
</tr>
<tr>
<td>County Wide Payment, Fees, Inventory, Exception (5902/5903/5904)</td>
</tr>
<tr>
<td>Substation Summary Payment, Fees, Inventory (5921/5922/5923)</td>
</tr>
<tr>
<td>Title Package Report (5911)</td>
</tr>
</tbody>
</table>
Frequently Asked Questions About RTS Point of Sale (POS)

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I log on to POS?</td>
<td>1. At the Welcome to Windows page, press the Ctrl + Alt + Delete keys at the same time on your keyboard.</td>
</tr>
<tr>
<td>How do I know what to log in to?</td>
<td></td>
</tr>
<tr>
<td>What happens if I log in wrong workstation?</td>
<td></td>
</tr>
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Frequently Asked Questions About Cognos Reporting

<table>
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<tr>
<th>Question</th>
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</thead>
<tbody>
<tr>
<td>I clicked on the Cognos icon and attempted to log in to Cognos. I receive an error message. Why?</td>
<td>The Cognos Reports icon is installed on all RTS workstation desktops and anyone can click it and attempt to log in but your login will only be successful if you have the correct permissions. Please contact your County Administrator to verify your permissions.</td>
</tr>
<tr>
<td>How many county reports will be developed for Cognos?</td>
<td>In the first release, more than 19 former mainframe (or, legacy) reports that were previously downloaded to your printer have been converted to Cognos. Separate summary and detail reports (like the Funds Transactions detail and Funds Summary) were combined into one Cognos report. Some of the daily reports remain in the RTS POS and you can access them using the Reprint Reports event. Refer to the Job Aid quick references posted on the TAC Hub for a complete list of converted and available reports.</td>
</tr>
</tbody>
</table>
TxDMV RTS Guide for Running Daily, Weekly, and Monthly RTS Activity Reports

May 15, 2015
Reference materials for Cognos training is on the TxDMV TAC Hub.
Check your knowledge
Knowledge Check

True or False

1. Cognos will replace all RTS reports.
   False

2. Other counties will not be able to see my county’s reports.
   True

3. I must print hard copies of all reports.
   False

4. Reports are only available in pdf format.
   False

5. I can attach a report to an email and send it to myself or others, even if they do not have access to Cognos.
   True
Questions and Summary
The RTS Refactoring Webinar - Reports

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