



Cognos Report View

Cognos provides the functionality of being able to save your parameter choices for any of the reports. This is useful if you always choose the same department(s), cost centre(s) or source of fund(s).

Creating a Report View

A *report view* is a **copy** of a report that is stored in your personal folders. A report view can be set up

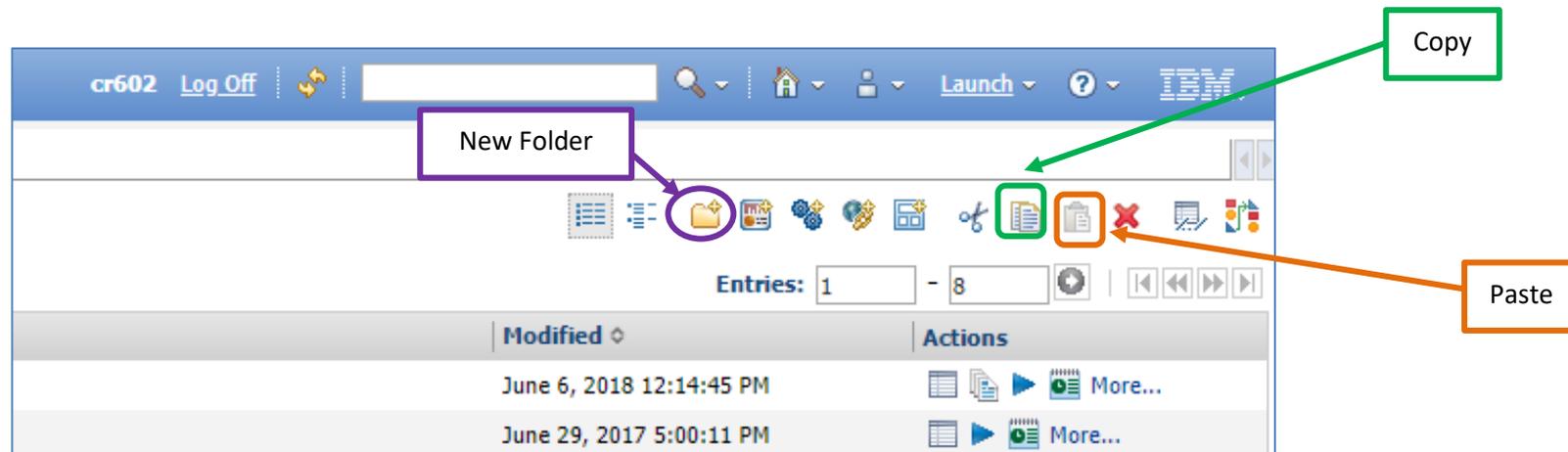
- ✓ so that associated prompt values can be pre-selected and saved with the report view; and
- ✓ the view can then be scheduled and run unattended using those values.

REMEMBER - You must always make a **copy** the report you want to use in your personal folder.

To create a new folder, click the **New Folder** icon in the tool bar, manually enter a folder **Name**, and ensure that the **Location** is set to **My Folders**. Click **Finish**. For step by step instructions, refer to *Getting Started in Cognos* manual, section 7.

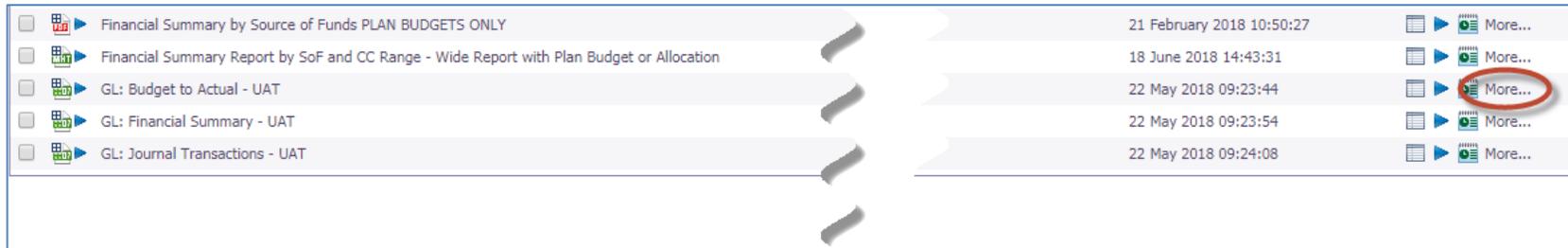
1. Create a copy of a report view of the report and copy it into one of your folders

- a) From *Cognos Connection*, tick the report you want to copy, and click on the **Copy** command in the tool bar, top right of screen

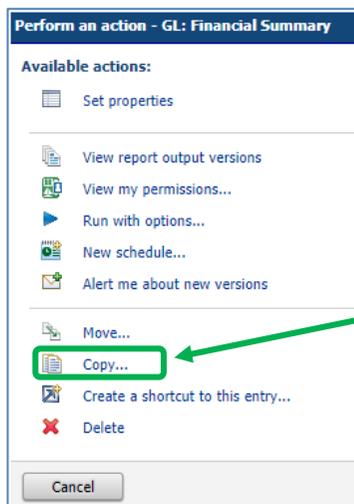


- b) Open the folder where you want to store the copied report, and click on the **Paste** command, to right of **Copy**.

Alternatively, click on **More...** beside the selected report, and click on **Copy**



Report Name	Last Run Date/Time	More...
Financial Summary by Source of Funds PLAN BUDGETS ONLY	21 February 2018 10:50:27	More...
Financial Summary Report by SoF and CC Range - Wide Report with Plan Budget or Allocation	18 June 2018 14:43:31	More...
GL: Budget to Actual - UAT	22 May 2018 09:23:44	More...
GL: Financial Summary - UAT	22 May 2018 09:23:54	More...
GL: Journal Transactions - UAT	22 May 2018 09:24:08	More...



Optional: Give the report a new name. You can do this later once the report view has been set up by adjusting the *properties* for the report view. See step below.

- c) Click on **My Folders**, or click on *Select another location* and navigate to a folder where you have permission to store a report.
- d) Click on **OK** to finish

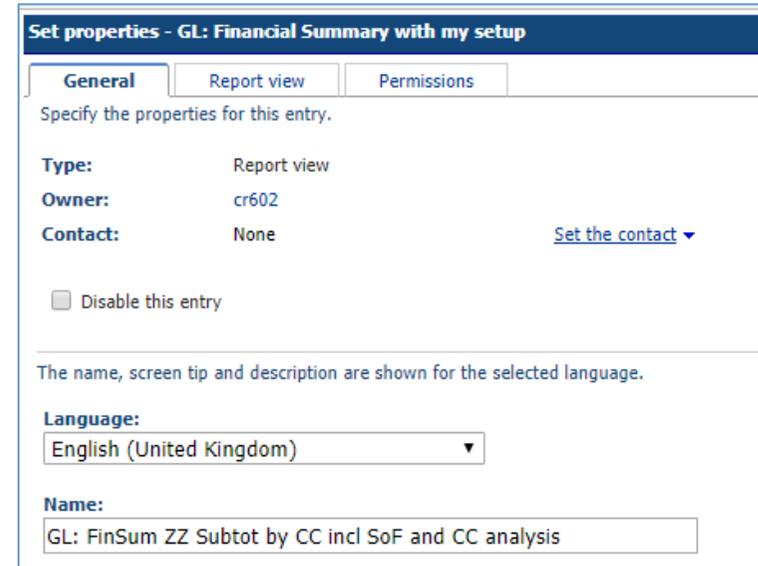
2. Set up the defaults for the report

- a) Navigate to the folder where you stored your report view.
- b) Select the relevant report, and click on **More...**

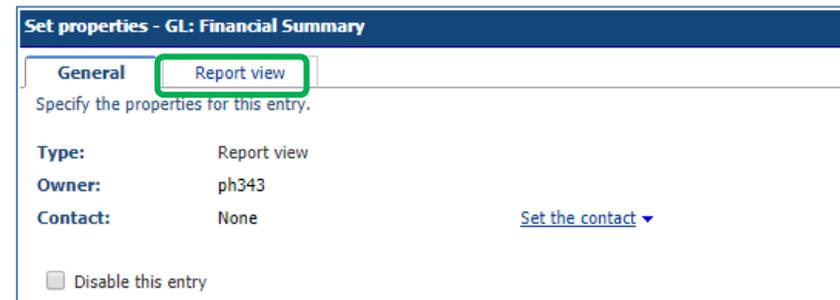
c) Click on *Set properties*



d) In the *General* tab, it is recommended that you change the name of the report. You can add "copy" before or after to differentiate from public version, but a more specific name may assist in future, particularly if you have many report views for same report.



e) Click on the *Report view* tab



- f) Click on **Set** to select the default prompt values
The report's parameter selection screen appears
- g) For each required prompt, select the desired values
Continue through all selections until finished
- h) Click **Finish**
Your selection appears under *Prompt values*.



These values can be changed at any time by clicking on *Edit...* or removed completely by using *Clear*.



Note: It is not advised that you uncheck the *Prompt for values* box as you will need to change the GL period on a monthly basis. If you leave the box checked, the report runs interactively and the prompt page appears each time. This gives you the opportunity to change one or more of the values that you selected, if required, or else, click *Finish* immediately.

3. Click **OK** to finish setting up the report view.

You can create multiple report views of a single report each with its own separate report options - copy the report each time, and **rename** appropriately!

Note: To schedule a report where you have set up a report view, please refer to the Training Guidance and FAQs > Cognos webpage, [Scheduling a report with a report view set up](#).