UCDAVIS
Accounting and Financial Services
BI & ANALYTICS

TRS REPORTING GUIDE
(COGNOS WEB PORTAL USER GUIDE)

Date	Version	Change Reference
04/29/2016	1.0	First Release
05/10/2016	1.1	Export and Report view features added

About this User Guide:

This document contains an introduction to the Cognos web portal and step-by-step instructions for logging into Cognos and navigating the TRS reports.

*Browser Compatibility for viewing Cognos reports:

Cognos user's report viewing experience may differ based on the browser used by the user. Cognos Web portal is compatible to work on most of the Web browsers such as Chrome, Firefox, IE and Safari. Users may not be able to use full report features in Safari browser.
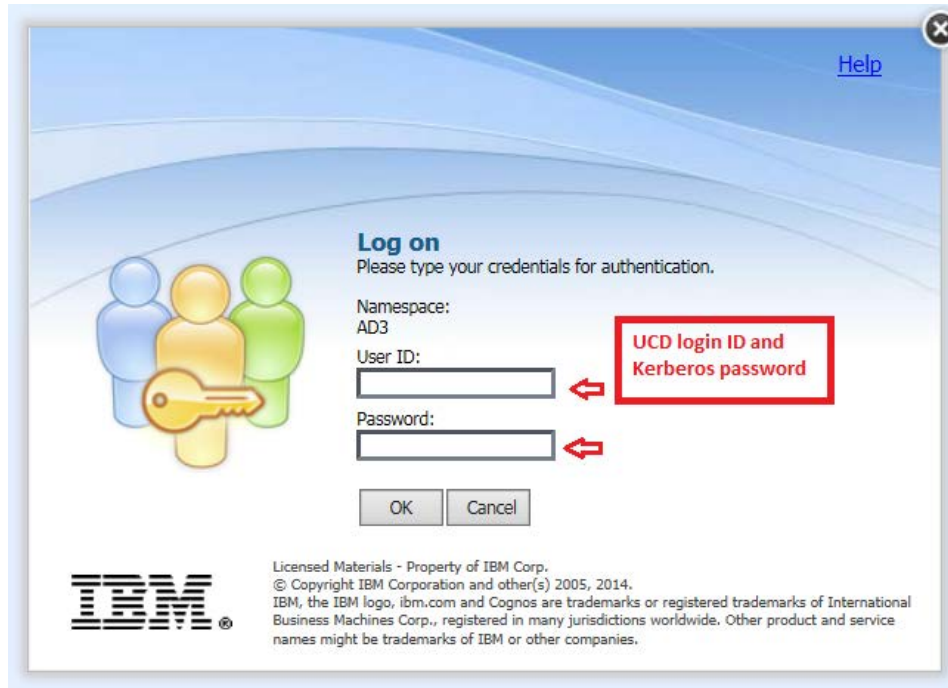
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Accessing Cognos Portal

1) Link to Cognos portal **(Production):**

http://afs-bi.ucdavis.edu/

2) Accessing above mentioned link will take the user to below screen. Please use your current UCD login ID and Kerberos password to login.

Accessing TRS Reports

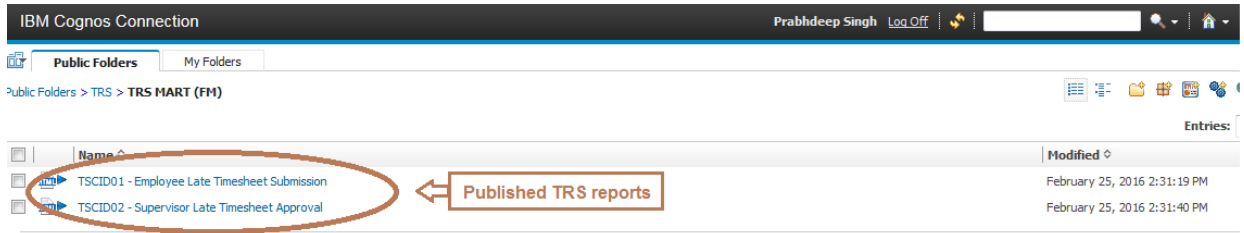3) After a successful logon, users will see below screen. Please make sure you select "Public Folders" if not already selected. Click "TRS" folder to access all TRS reports.
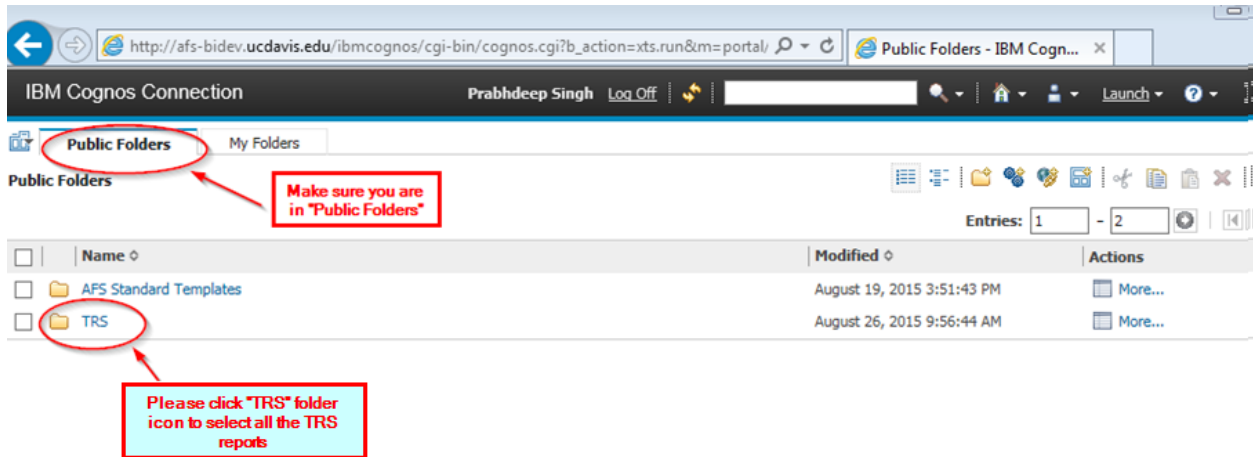
4) Click "TRS MART (FM)".
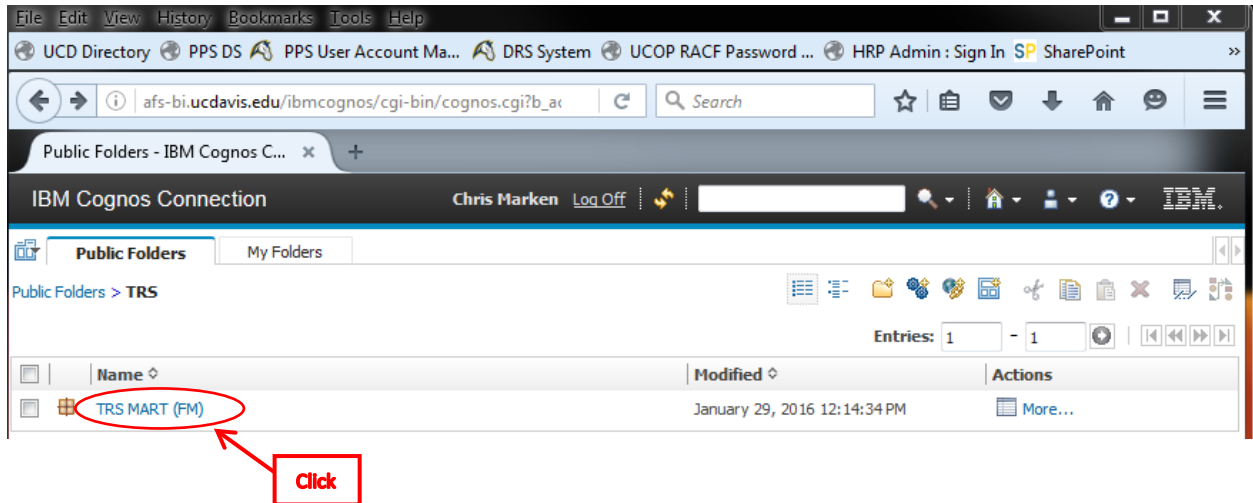
5) Select one of the published TRS reports.

Sample Report

6) Example use of "**TSCID01 - Employee Late Timesheet Submission**" report

Default view of the report:

Report Prompts / Report Filters

7) Users can run the report after selecting the "Report Prompts" also known as report filters. These report filters are optional. Please hit "Submit" after selecting the desired filters to see the report results.

Sample Report Results Using Filters

8) Report results after selecting the report filters and Submitting:

Report Navigation

9) The report generated may have multiple pages generated based on the user selected filter values. The report does not show the number of pages of data generated on the report interface. Page Down link will cause the next page to be shown in the viewing area of the report. Please use "Page up", "Page Down", "Top", "Bottom" links to navigate through different pages in the report. "Page up" and "Page Down" will take user one page up and one page down in the report respectively. "Top" will take user to first page of the report generated. "Down" will take user to end of the report result set.

TSCID03 - DTA Late Timesheet Submission

Filters Selected:
Division:
Dept:

Period Date Range (From): Jan 1, 2015
Period Date Range (To): Dec 1, 2015

Div Title	Dept Title	Dept Cd	DTA Id	DTA Last Nm	DTA First Nm	Pay Period Start Dt	Pay Period End Dt	Pay Schedule Desc	No Of Times Late	Report Filters
campus planning	occupational health services	062100	388641292	zimmerman	lori	Jan 1, 2015	Jan 31, 2015	monthly cycle	3	
						Feb 1, 2015	Feb 28, 2015	monthly cycle	2	**DTA Id (Optional):**
			641014204	barba	leticia	Jul 5, 2015	Jul 18, 2015	biweekly cycle	1	
			712551233	means	brenda	Feb 1, 2015	Feb 28, 2015	monthly cycle	1	
						Mar 1, 2015	Mar 31, 2015	monthly cycle	6	**Period Date Range (Optional):**
						Apr 1, 2015	Apr 30, 2015	monthly cycle	7	
						May 1, 2015	May 31, 2015	monthly cycle	6	Default: Last 90 Days
						Jun 1, 2015	Jun 30, 2015	monthly cycle	6	From:
	vc planning, fac & safety	062101	580662161	ricks	lois	Jan 1, 2015	Jan 31, 2015	monthly cycle	3	Jan 1, 2015
						Feb 1, 2015	Feb 28, 2015	monthly cycle	2	To:
						Mar 1, 2015	Mar 31, 2015	monthly cycle	3	Dec 1, 2015
								monthly cycle	5	**Pay Schedule (Optional):**
								monthly cycle	6	○ biweekly cycle
								monthly cycle	6	○ monthly cycle
			798634366	gracia	vicki	Jul 1, 2015	Jul 31, 2015	monthly cycle	6	Deselect
vp - agriculture	4 h foundation	062098	183216225	pohl	ann	Jan 1, 2015	Jan 31, 2015	monthly cycle	2	**Division Title (Optional):**
						Feb 1, 2015	Feb 28, 2015	monthly cycle	1	☐ accounting
						Mar 1, 2015	Mar 31, 2015	monthly cycle	1	☐ campus planning
						Apr 1, 2015	Apr 30, 2015	monthly cycle	1	☐ vp - agriculture
						May 1, 2015	May 31, 2015	monthly cycle	2	

Page Down link will cause the next page to be shown in the viewing area of the report. Please use these keys to navigate through different pages in the report.

⊼ Top ⌃ Page up ⌄ Page down ⌄ Bottom

Exporting Report to Excel, PDF and Other File Formats

10) Reports can also be viewed to PDF, Excel, CSV files. When you run a report in a format such as delimited text (CSV), Microsoft Excel spreadsheet software format (XLS), the IBM Cognos report name is used as the exported file name.

- **View in Excel 2007 data**: This format is a simple table view that is best for working with your data in Excel after you've downloaded it. It will download an .xlsx file.
- **View in Excel 2007 format**: This is a formatted view of your data that mimics the look of the Cognos report. It will download an .xlsx file.
- **View in Excel 2002 format**: If you have Excel 2007 or later, we do not recommend using this format at this time.
- **View in CSV format:** This is a simple table that is in comma separated values format, which is easily read by other programs. It will be saved with a .xls extension, and by default, it will be opened in Excel.
- **View in PDF format** enables the users to generate the report output in PDF format. To view the PDF generated report, users should have Adobe PDF readers installed on their computers.
- By default when you run a report, report will be displayed in HTML format. To view report in PDF please click "View in PDF Format" as shown in below screenshot 1. You can Download the PDF version of the report from a PDF download button as shown in Screenshot 2 To go back to the HTML version of the report please click/select "View in HTML Format"
- Please contact your departments System Administrators to install MS Excel or Adobe PDF readers on your machines if not already installed.

Screenshot 1 – View in different formats

Screenshot 2 – PDF download

Create a Dynamic Report View

11) A "report view" is a copy of a report that is stored in your personal folders. A production report can be copied into a report view in a personal folder.

Please follow below screenshots for directions to create, save and access saved Report views.

↓

Specify a name and description - New Report View wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:

Report View of TSCID01 - Employee Late Timesheet Submission

Description:

Report view

> **Mention Report View name and Description**

Screen tip:

> **Select the location to save Report view and click Finish**

Location:
None

Select another location... Select My Folders

[Cancel] [< Back] [Next >] [Finish]

↓

IBM Cognos Connection

Public Folders | My Folders

Public Folders > TRS > **TRS MART (FM)**

> **Click "My Folders" to access saved Report view.**

☐ | **Name** ◇

☐ 📄▶ TSCID01 - Employee Late Timesheet Submission

☐ 📄▶ TSCID02 - Supervisor Late Timesheet Approval

☐ 📄▶ TSCID03 - DTA Late Timesheet Submission

↓

After accessing this report view in "My Folders", users can still filter through "**Report Prompts**"

IBM Cognos Connection

Public Folders | **My Folders**

My Folders

> **Saved Report view**

☐ | **Name** ◇

☐ 📄▶ Report View of TSCID01 - Employee Late Timesheet Submission
Report view

Create a Static Report View

12) You can also open the report, select the "Report prompts", "Submit" the report and "Save as Report View" from the report page result page itself. This shall save the report view with selected Report prompts and save it to your specified folder. So every time you run this report from the saved report view, reports shall always display with preselected/saved prompts.

In Static report view users can only view static data in the report view saved earlier and report cannot be filtered further through "Report Prompts" as shown below. Also this view cannot be viewed in PDF or excel and is only viewable in HTML.

Error Messages

13) If user gets the message "No Records Found", it could either be that there are no records present in the database matching the Filter criteria or the date range selected is outside the "Data retention criteria" for the application.

14) To return to report list, please hit the back button shown in below screenshot:

Clearing Browser History

15) How to Clear History for Different Browsers:

If Users see bellow error message while trying to login please clear your browser history and then try logging in again.
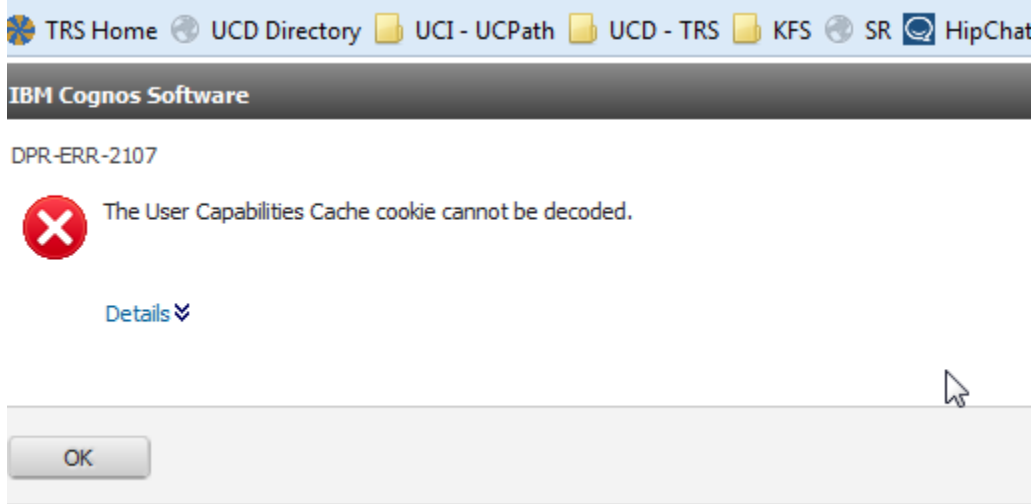
Clear History for Firefox browser

For Google Chrome:

For Internet Explorer:

Report Tips

- All report prompts/filters are optional. If no search criteria is entered before clicking the Submit button, the default settings will return all late time submissions or late approval results for the past two fiscal years to current.
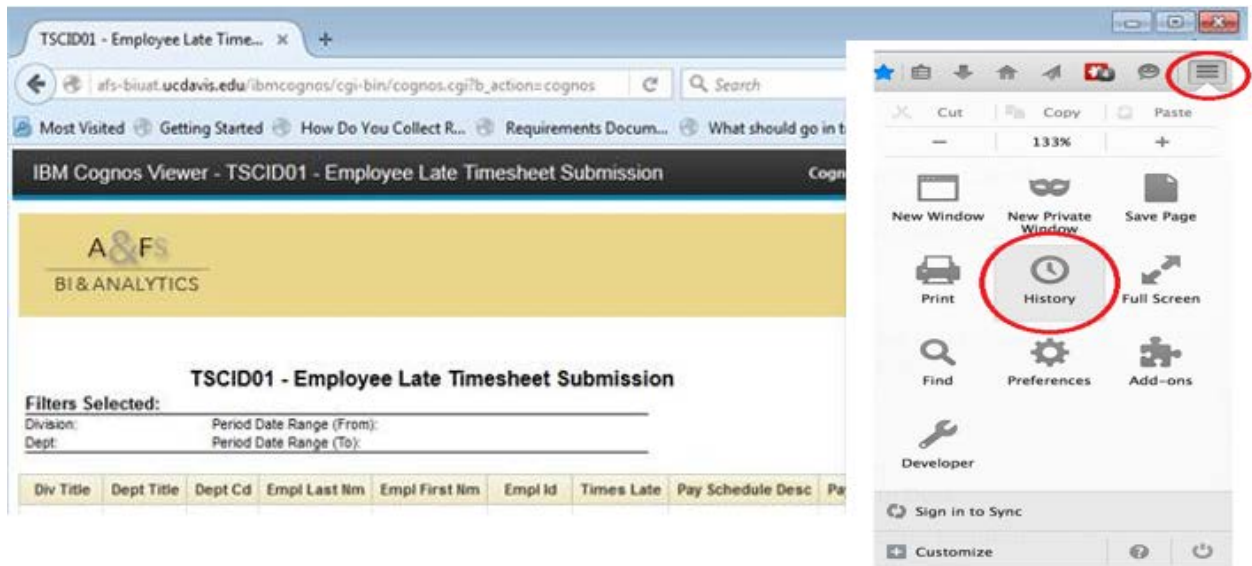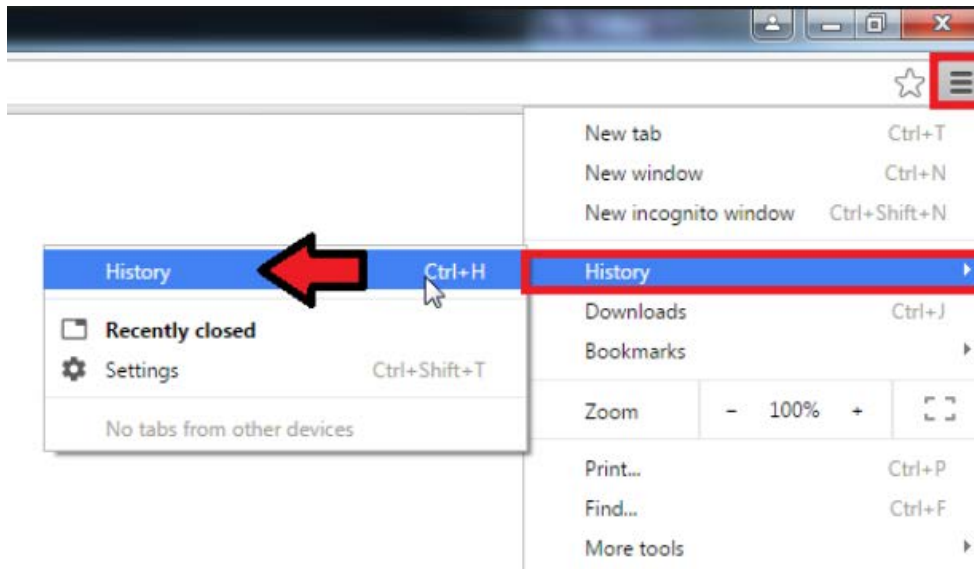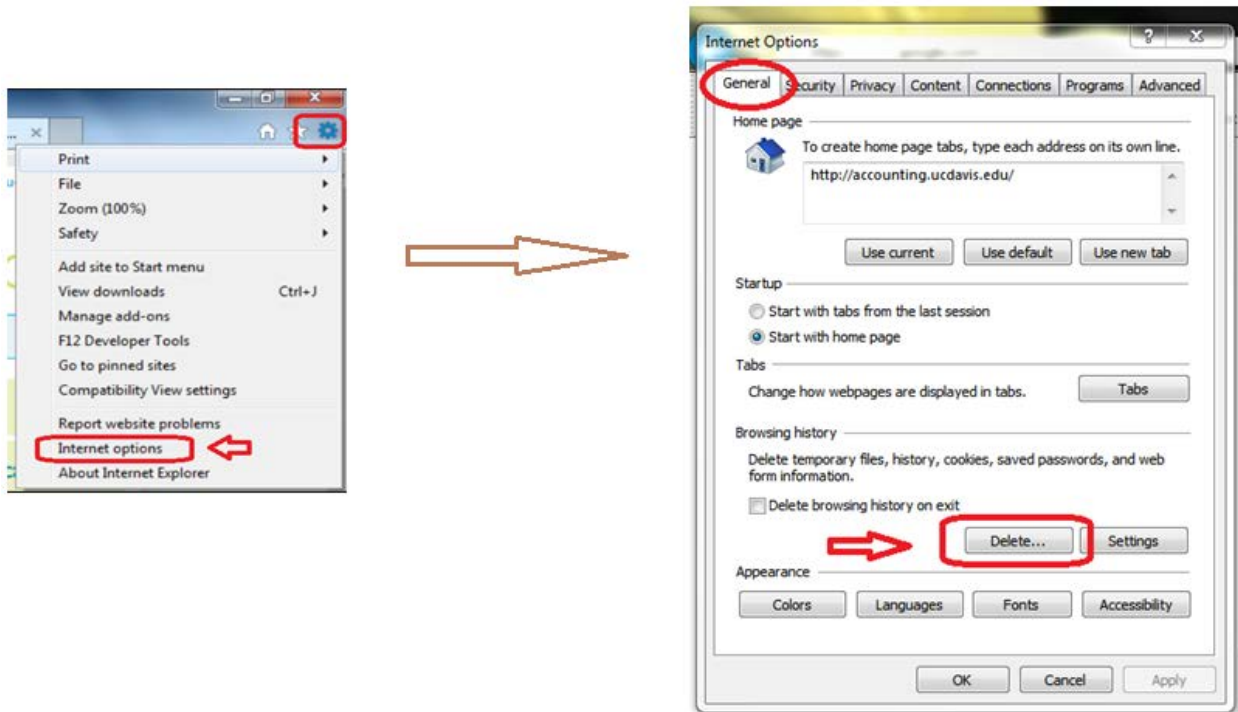
- The message "No Records Found", indicates there are no records present in the database matching the Filter criteria or the date range selected is outside the "Data retention criteria" for the application.

- If the word "Default" appears within the supervisor name columns of the Supervisor Late Approvals report, this generally indicates the supervisor is not an active employee in the Payroll/Personnel System (PPS), but rather is a UC Davis Temporary Affiliate (TAF).

- The search results may generate from one to multiple pages based on the search criteria selected. Use "Page up", "Page Down", "Top", "Bottom" links to navigate through different pages in the report. The "Page up/Page down" buttons are located in the lower left corner of the results page.

- "Email Report" feature is currently not open on the Cognos report.

- Have questions or need help with the use of these reports? Feel free to contact the TRS Help Desk at trshelp@ucdavis.edu.