

OCFS Data Warehouse

IBM Cognos 8: Quick Reference Guide

Logging into IBM Cognos 8

1. Open **Internet Explorer** from your local desktop.
2. At the top of the Internet Explorer screen, type the appropriate web address, and press the **Enter** key on your keyboard:

Local Districts and State Staff <http://cognos.otda.state.nyenet/cognos8> or <http://10.64.8.28/cognos8>

If a pop-up login box appears, enter your HSEN ID (hsen/ab1234) and password to proceed.

SSL/VPN Agency Staff <https://rc1.cio.ny.gov/hsen>

Make sure your LAN Admin or LSA has submitted form OCFS-4827 "SSL VPN Request for Access" to data.warehouse@ocfs.state.ny.us. This form must be approved by the Data Warehouse team before the Cognos 8 link can be added.

3. If a confidentiality warning displays, read it and click **I Accept**.
4. When the IBM Cognos 8 welcome screen displays, click on the **My Home** link. You can bypass this welcome screen in the future by unchecking the "Show this page in the future" box.
If you do not see the IBM Cognos welcome screen, you may not have access to the Cognos 8 environment. See the "Resources" section for information.

Adding IBM Cognos 8 to your Internet "Favorites"

1. With the IBM Cognos Connection screen open, click on **Favorites** from the menu at the top of the Internet Explorer screen.
2. Select **Add to Favorites...** from the drop-down list.
3. In the Add a Favorite dialog box, change the text in the **Name** area to "IBM Cognos 8 Login," and click on the OK button.
*The next time you want to access Cognos 8, open Internet Explorer, click on the **Favorites** menu, and select **IBM Cognos 8 Login** from the drop-down list.*

Adding the OCFS Data Warehouse Tab

This set-up only needs to be done if you do not see the OCFS Data Warehouse tab on the IBM Cognos Connection screen.

1. From the IBM Cognos Connection screen, click on the **Tab Menu** icon  located to the left of the Public Folders and My Folders tabs.
2. Select **Add tabs...** from the resulting list.
3. Click on the link for **Public Folders**.
4. Click on the link for the **Global Reports** folder.
5. Click on the link for the **Portal Pages** folder.
6. In the Available Entries section, place a check mark in the box to the left of **OCFS Data Warehouse**.
7. Click on the green arrow in the center of the window to move this item to the Selected Entries section.
8. Click on the **OK** button to add the OCFS Data Warehouse tab.

Modifying the Portal Tab Order

1. From the IBM Cognos Connection screen, click on the **Tab Menu** icon  located to the left of the Public Folders and My Folders tabs.
2. Select **Modify the sequence of tabs...** from the resulting list.
3. Use the **Up**, **Down**, **To Top**, and **To Bottom** links to rearrange the sequence of the tabs to the desired order.
4. Click on the **OK** button.

Setting the "Home" Portal Tab

1. Click once on the OCFS Data Warehouse tab.
2. Click on drop-down arrow next to the Home icon  in the upper right corner of the IBM Cognos Connection screen.
3. Select **Set View as Home**.

Running Predefined Reports

Note: Internet Explorer pop-up blockers must be disabled to run reports.

1. From the IBM Cognos Connection screen, make sure you are on the **OCFS Data Warehouse** tab.
If you do not see the OCFS Data Warehouse tab, review the section titled "Adding the OCFS Data Warehouse tab."
2. Click once on the folder name containing the subject matter of the reports you are interested in viewing. For example, the FASP Reports folder contains predefined reports about FASPs.
3. Click once on any report name to run the report.

*Predefined reports are typically set to run in HTML format . To run reports in a format other than HTML use the **Run with Options** icon  across from the report name.*
4. If a prompt page displays, make your selection(s) and click the **Next** or **Finish** button to progress through the prompt screens.
5. Once you click on the **Finish** button, a spinning hourglass will display on the screen while the report output is generating.

Saving HTML Output in PDF Format

1. With the HTML output open on the screen, click once on the drop-down arrow next to the **View in HTML Format** button.
2. Select **View in PDF Format**.

3. Once the report generates in PDF format, click on the **Save** or **Save a Copy** button on the PDF toolbar.
4. At the **Save** window, navigate to the location where you want to save the file.
5. In the **File name** area, type a name for the file.
6. Make sure the **Save as type** is set to Adobe PDF Files (*.pdf).
7. Click on the **Save** button.

Saving HTML Output in Excel Format

1. With the HTML output open on the screen, click once on the drop-down arrow next to the **View in HTML Format** button.
2. Select **View in Excel Options**.

3. Select the desired Excel option.

4. If a File Download dialog box appears, click on the **Save** button.
5. At the **Save As** window, navigate to the location where you want to save the file.
6. In the **File name** area, type a name for the file.
7. Make sure the **Save as type** is set to Microsoft Office Excel Worksheet or Excel Workbook (*.xlsx).
8. Click on the **Save** button.
If the Excel output appears on multiple worksheets, try using View in Excel 2000 Single Sheet Format.

Logging Off

1. Click on the **Log Off** hyperlink at the top of the screen.
2. At the top of the Internet Explorer screen, select **File > Close**.

Resources

- Send questions and access requests to data.warehouse@ocfs.state.ny.us.
- Visit the OCFS Data Warehouse Intranet page at <http://ocfs.state.nyenet/connect/datawarehouse>.