

# **INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE**

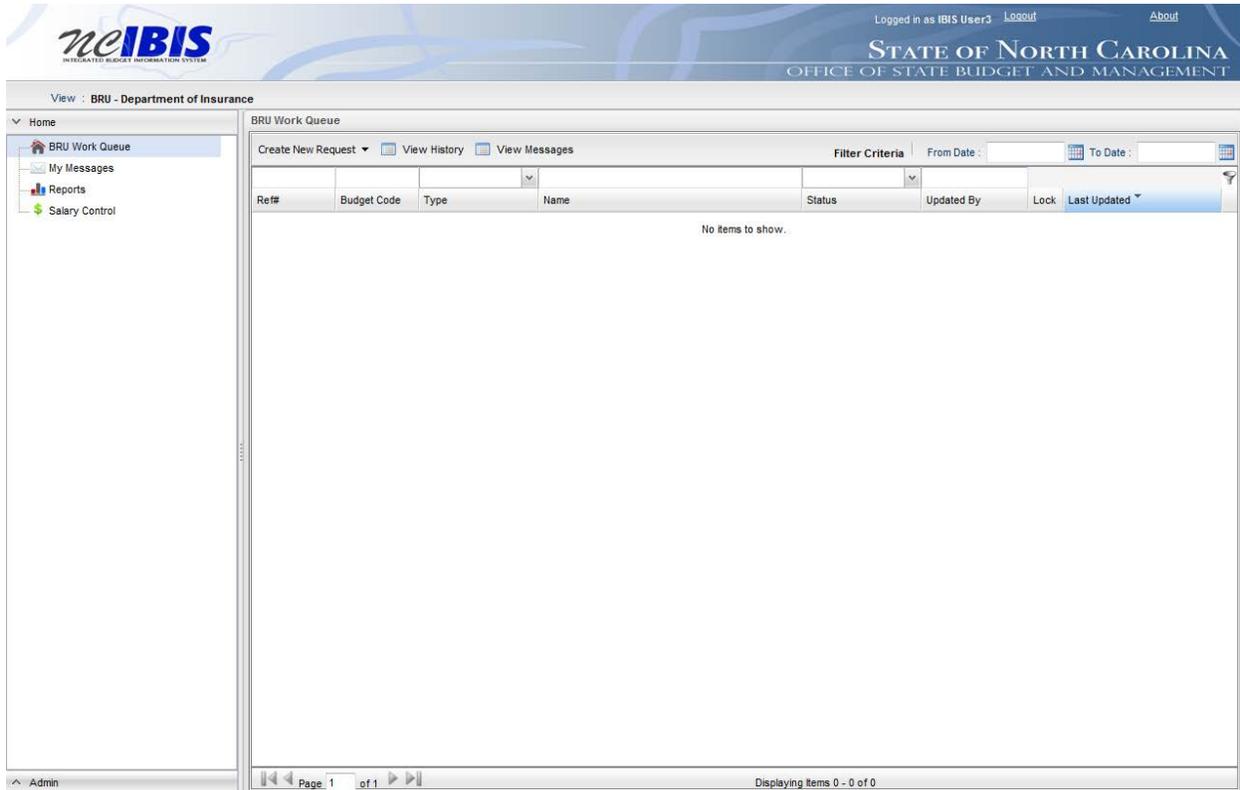
## **REPORTS**

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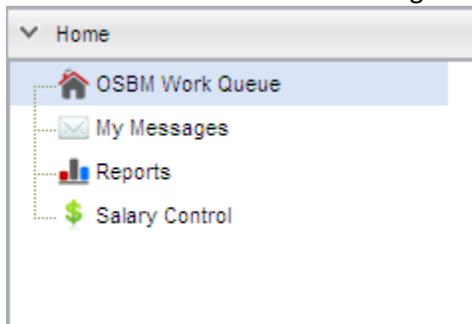
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## OVERVIEW OF GENERAL REPORTING FUNCTIONALITY

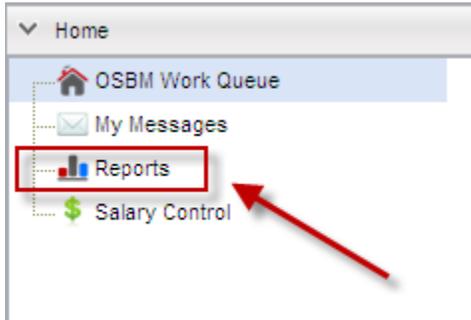
Access the IBIS application using your NCID and password. Once logged in, you will see the work queue.



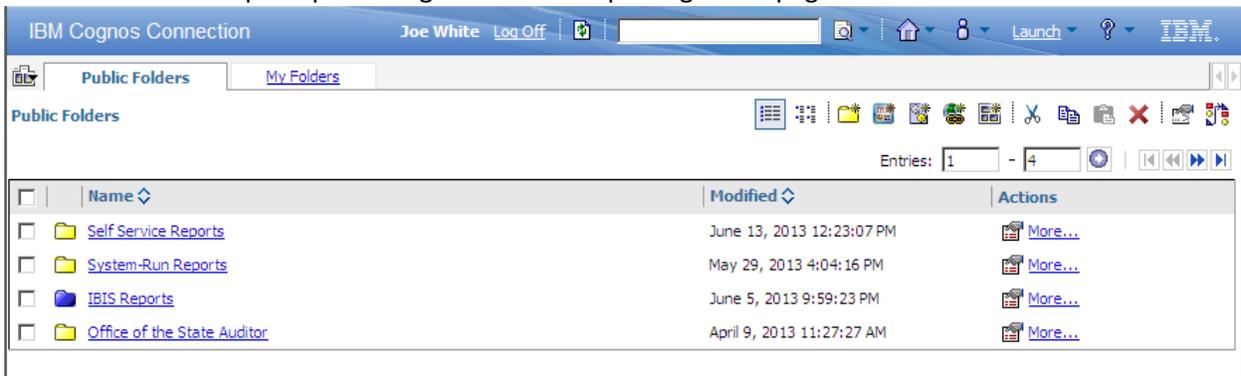
The left side of the screen is a navigation menu that presents the user with several options.



Click on Reports to access Cognos Reporting.



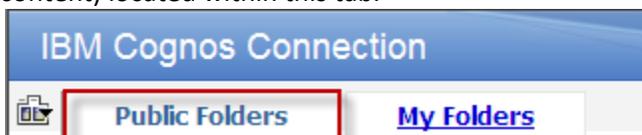
A new window will open up showing the default Reporting home page.



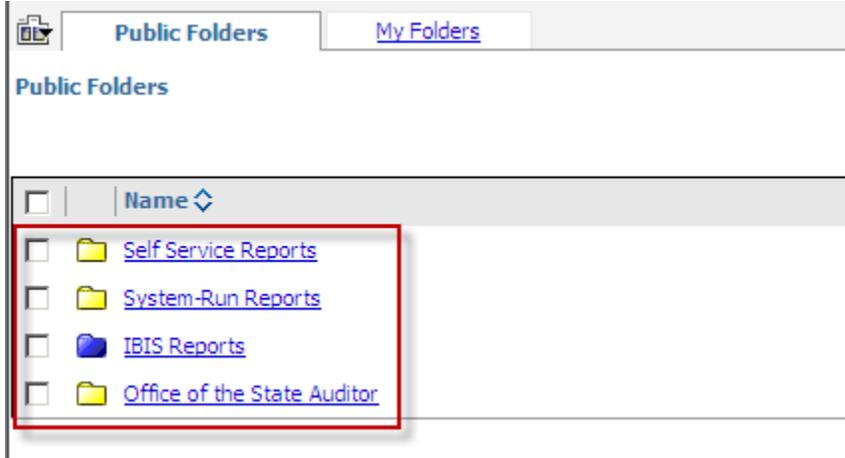
On the upper left hand side of the screen, you see Public Folders and My Folders (private folders). You can navigate to other folders and/or reports that you would like to access.



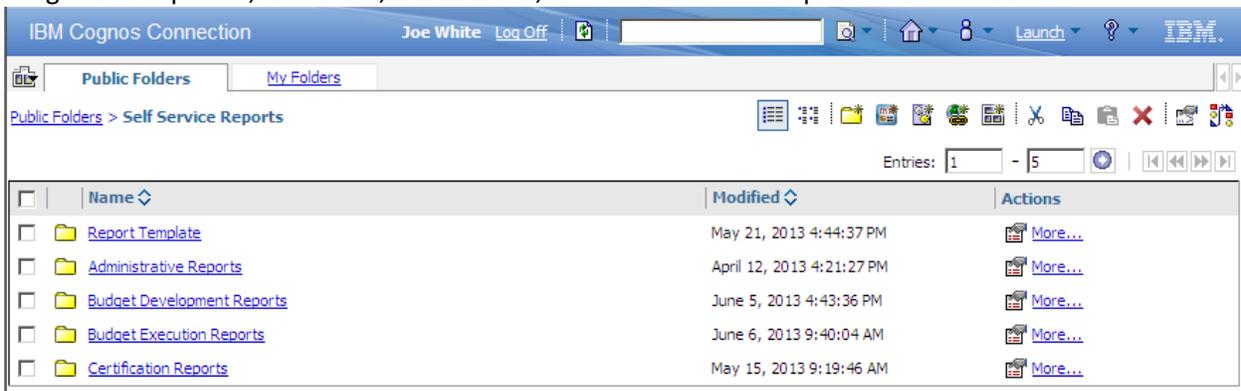
Under Public Folders, there will be folders listed that contain reports relevant to your role in IBIS. You will find various shared folders and an IBM Cognos packages (blue IBIS Reports folder with no report content) located within this tab.



There are four folders displayed as shown below: Self Service Reports, System-Run Reports, IBIS Reports, and a department/agency folder (Office of the State Auditor in the example). Each folder's content will be explained in greater detail in this user guide.



The **Self Service Reports** folder contains access to several reports for a variety of budget areas, including budget development, execution, certification, and administrative reports as shown below.

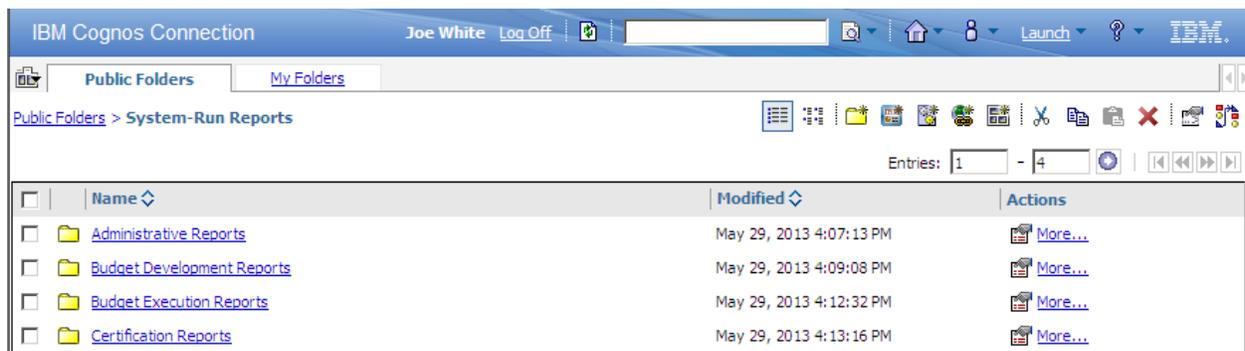


Each folder contains various reports and this list of reports will change over time as reports are altered/deleted and new reports emerge. The Report Template folder contains no reports but is needed to support the overall functioning of the report system. This folder should be ignored.

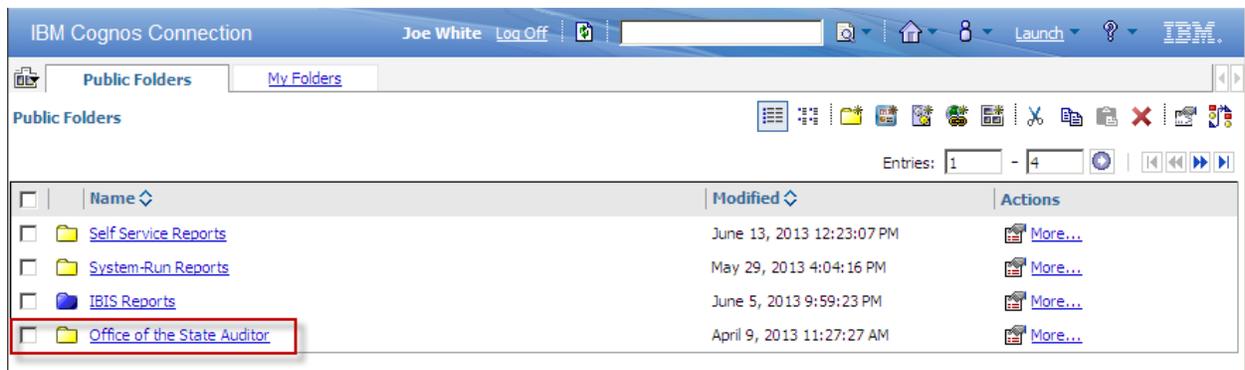
Clicking on the title of the file will bring forth the reports contained within that folder. For example, shown below is a list of reports for the Budget Execution Reports folder. Note that this list is not an exhaustive execution report list and this will change over time. **Self Service Reports** allows you to generate reports yourself by selecting a report from list shown in the folder and choosing from a set of prompts.



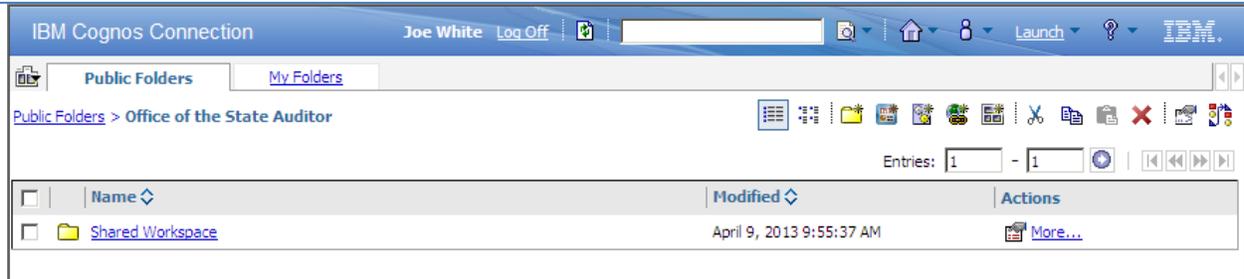
The **System-Run Reports** folder contains similar access as the Self Service Reports folder by including several reports for a variety of budget areas, including budget development, execution, certification, and administrative reports as shown below. However, the **System-Run Reports** folder does not allow you to run reports yourself; instead, there will be reports located within the folder that have been run by the system and available for your review and use. This allows you to bypass the need to go through the Self Service Reports folder, which requires you to generate a report manually. The **System-Run Reports** folder is designed to save time and make access to reports easier for end users.



The **department/agency** folder contains a shared workspace where reports may be saved. The Office of State Auditor is used as the example in this user guide.

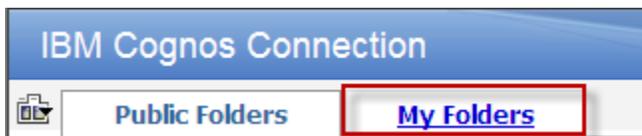


When the department/agency folder is selected, the following will appear.



Clicking on the title of the folder will bring the reports contained within that folder. The Shared Workspace folder may be used to save versions of reports and have them accessible to users within an organization. This process will be explained later in this user guide.

The My Folders tab may also be used to save reports.



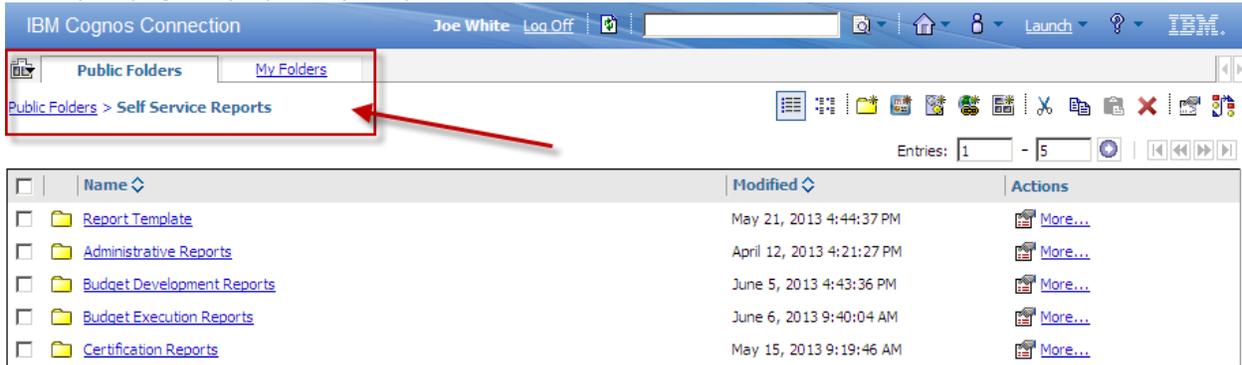
Folders and reports saved here can only be accessed by you or an administrator. Saving reports in My Folders will restrict access and will not allow others to see the saved content. If you wish to have a saved report accessible to others, you should save it in the Shared Workspace folder that is accessible through the path shown below. (Note that the Department of Insurance is for demonstration purposes only. Your organization will be shown in the system based on your login credentials.)

[Public Folders](#) > [Department of Insurance](#) > [Shared Workspace](#)

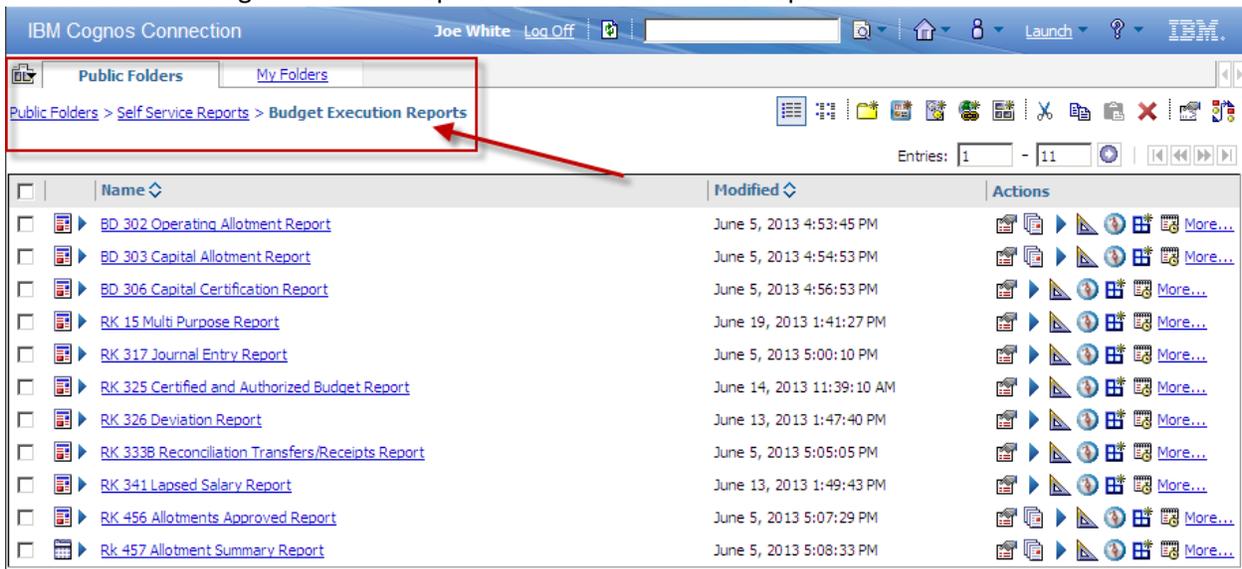
### RUN A REPORT

To run a report, select the folder where the report resides. To open a folder, click on the folder name. The example below displays the results of clicking on the Standard Reports folder.

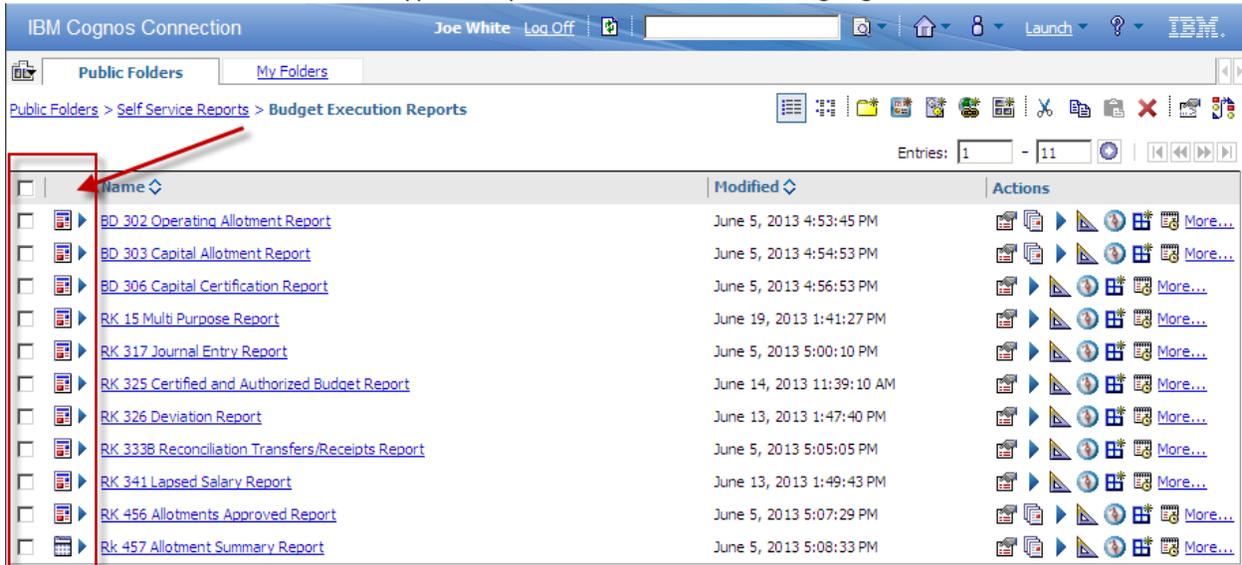
The top of page displays the path you have taken to see this result.



As you continue to make selections this path will reflect each level of movement. This example reflects the selection of Budget Execution Reports from the Self Service Reports folder.



There are icons that indicate the type of reports that will be run as highlighted below.



Note that there are different types of icons for reports:



The first report icon shown above indicates a report that will be displayed in PDF format. The second icon indicates a report that will be displayed in HTML format. The third icon indicates a report will be displayed in Excel format.

To run a report, click on the report title. The example used below is for a RK325 Certified and Authorized Budget Report.

Note: When selecting a report that requires criteria to be defined (a self-service report), the page will refresh to display a prompt page with criteria fields as shown on below. The criteria fields available will differ for every report but will look similar as they present the user with button selections, dropdown lists, and date fields. Criteria fields should be filled out in this order: Top row, left to right, next row, left to right, and so on.

**Certified And Authorized Budget Report (RK 325)**

**Report Type**

- \*  ALL
- Summary By Fund (Dollars)
- Summary By Account (Dollars)
- Detail By Account (Dollars)
- Summary By Fund (FTE)
- Summary by Account (FTE)
- Detail By Account (FTE)

**Biennium**

\*

**Approval Date**

\*  

**Budgetary Reporting Unit**

\*

**Budget Code**

Cancel
< Back
Next >
Finish

When presented with a criteria option like the Report Type, shown above, the user may select only one option in the list and makes that selection by clicking in circle to the left of the option, or on the option name. Only one option can be selected in this type of prompt. Choosing ALL will run all report types and produce a comprehensive report.

**Report Type**

- \*  ALL
- Summary By Fund (Dollars)
- Summary By Account (Dollars)
- Detail By Account (Dollars)
- Summary By Fund (FTE)
- Summary by Account (FTE)
- Detail By Account (FTE)

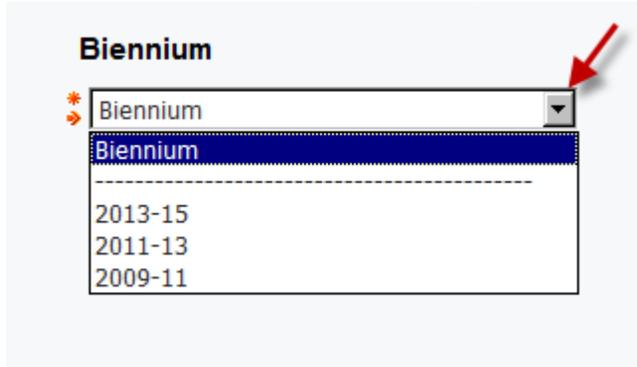
Criteria fields with a red asterisk next to them, like the one shown above, are required fields and the report cannot be run if a selection is not made for that criterion.

When presented with a criteria option like the Biennium field shown below, the user may select a value that is available in the dropdown list.

**Biennium**

\*

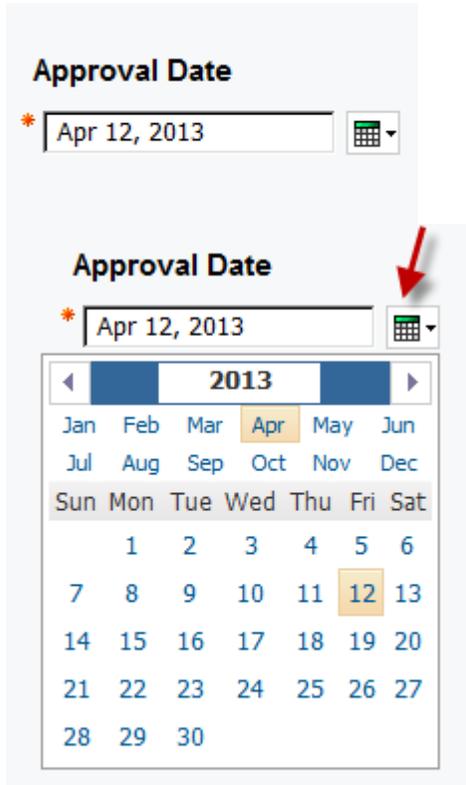
The dropdown list is accessed by clicking on the down arrow at the end of the field.



The dropdown list criteria box shown below displays a red asterisk, which indicates that it is a required field. It also displays a small red arrow and red dashes under the criteria box. These items indicate that this is a cascading criteria field. This means that selections made here will affect selections that will be available in one or more of the following criteria areas. Thus, it is required that criteria be selected in order, top row, left to right, next row, left to right, etc.



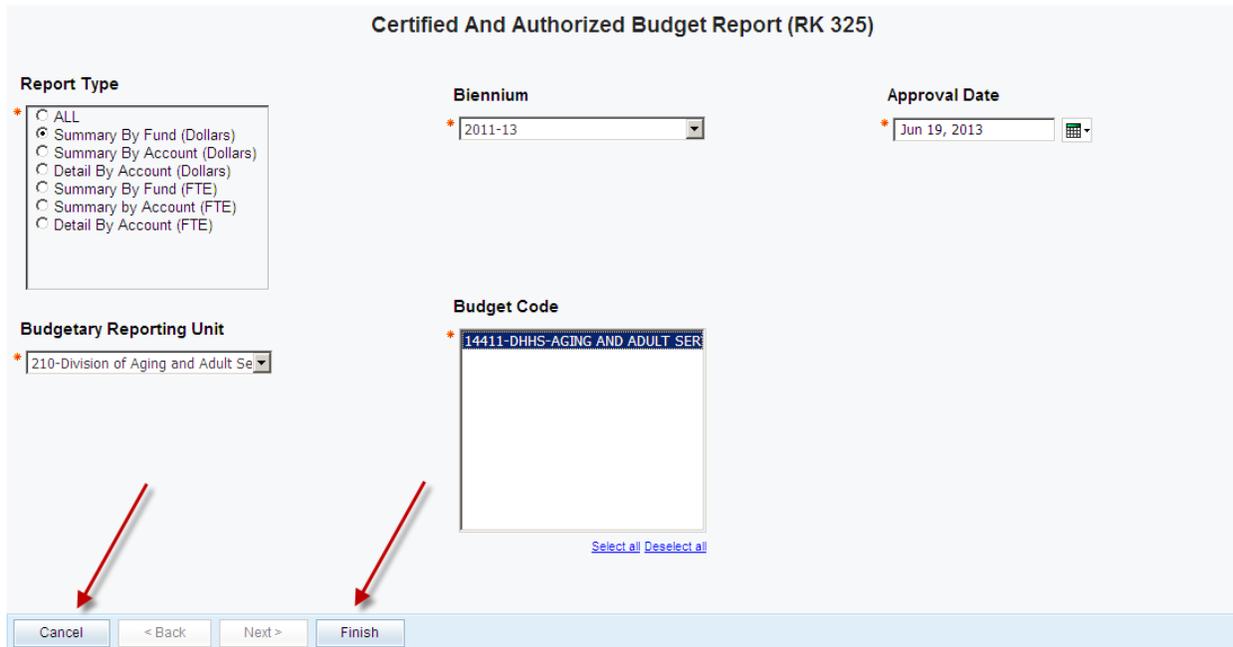
The Approval Date field shown below requires that a date be entered. To select a date, click on the small calendar icon next to the field.



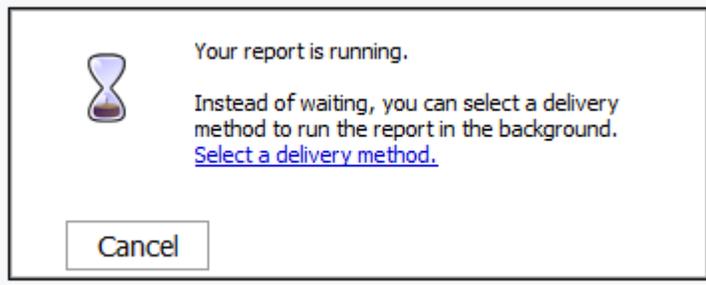
The Calendar will allow you to move forward or backward in time to select the date appropriate to the report you want to run. To select the date simply click on it in the calendar view, the calendar will close and the date will populate the date field.

The final fields when for the Certified and Authorized Budget Report require the selection of a BRU, which will bring a display of all budget codes for the selected BRU. You may select one or more budget codes, or may select all budget codes.

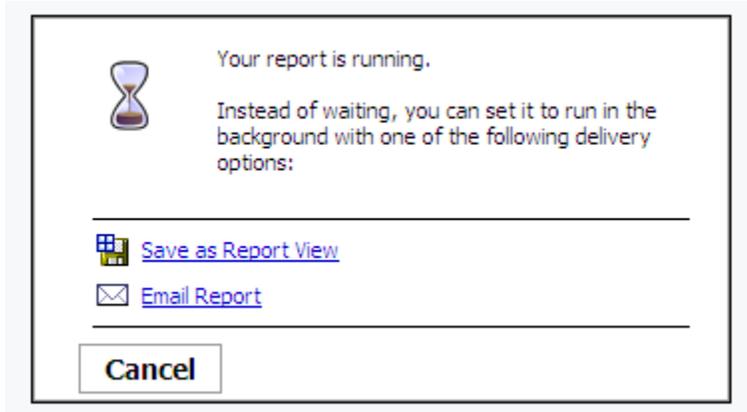
When you have selected values for all the required criteria in the selection window, click on the appropriate button at the bottom of the page.



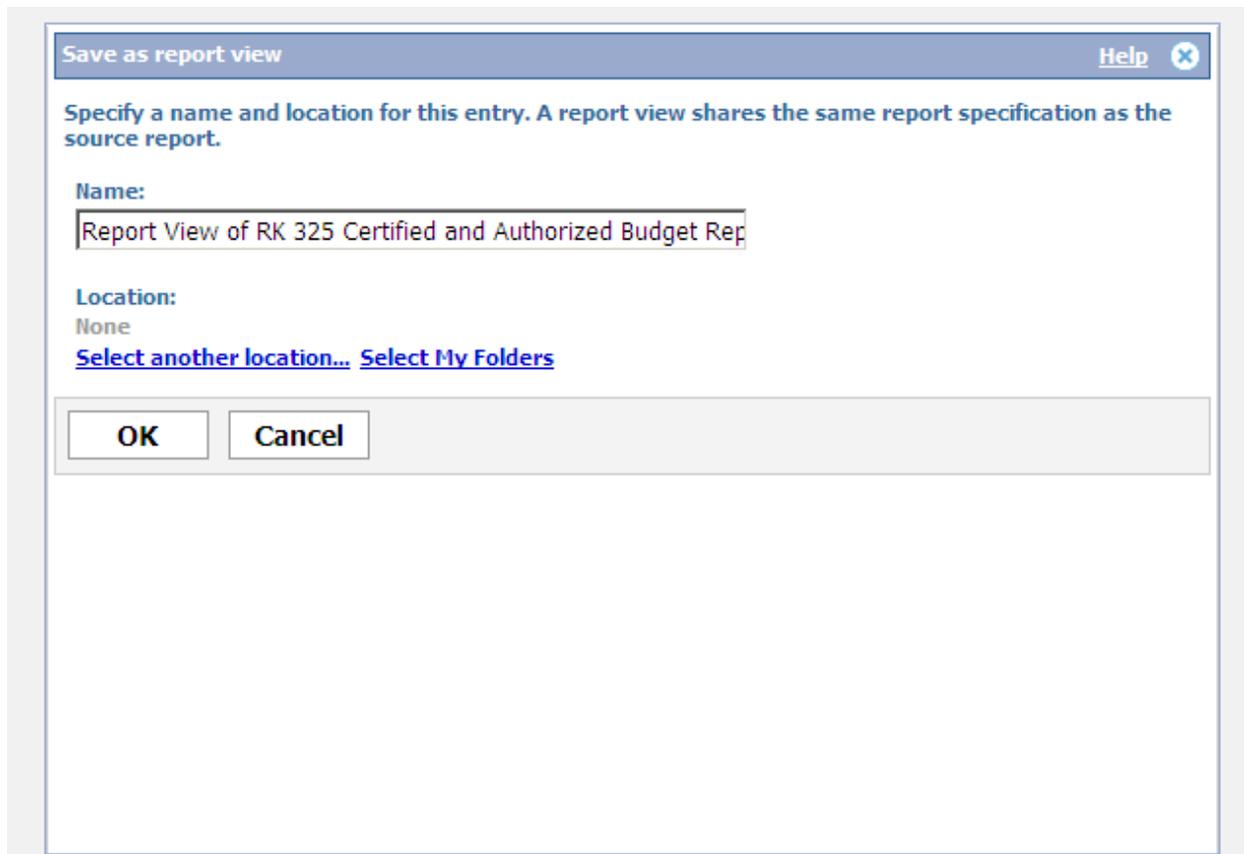
Clicking the Cancel button will close the criteria selection window and return the user to the list of reports where this was launched. Clicking the Finish button will generate the report. While the system is gathering the data according to the selected criteria, the following will be displayed.



If you click on the [Select a delivery method.](#) icon, you will see the following delivery options for the report: Save as Report View or Email Report. Choosing a delivery method may be preferable if wish to access the report at a later time.



If you choose the Save as Report View option, the following will be displayed.



You will be able to save the report run with the specific parameters chosen in the prompt page.

You can save reports in My Folders as shown below.

**Location:**

[Public Folders](#) > [Standard Reports](#)

[Select another location...](#) [Select My Folders](#)

If you wish to save the report in the Public Folder to have it accessible to other users, click Select another location. If you save in Public Folders, you must navigate to the Shared Workpalce. The path to Shared Workspace is shown below. The Department of Insurance is the example shown but this will show your ogranization based on your login credentials.

**Navigate the folders or search to find where you want to place the entry.**

  [Cognos](#) > [Public Folders](#) > [Department of Insurance](#) > [Shared Workspace](#)

If My Folders is chosen, the system will allow you to save the report in your own personal folder and it will not be accessible by other users. The path to My Folders is shown below.

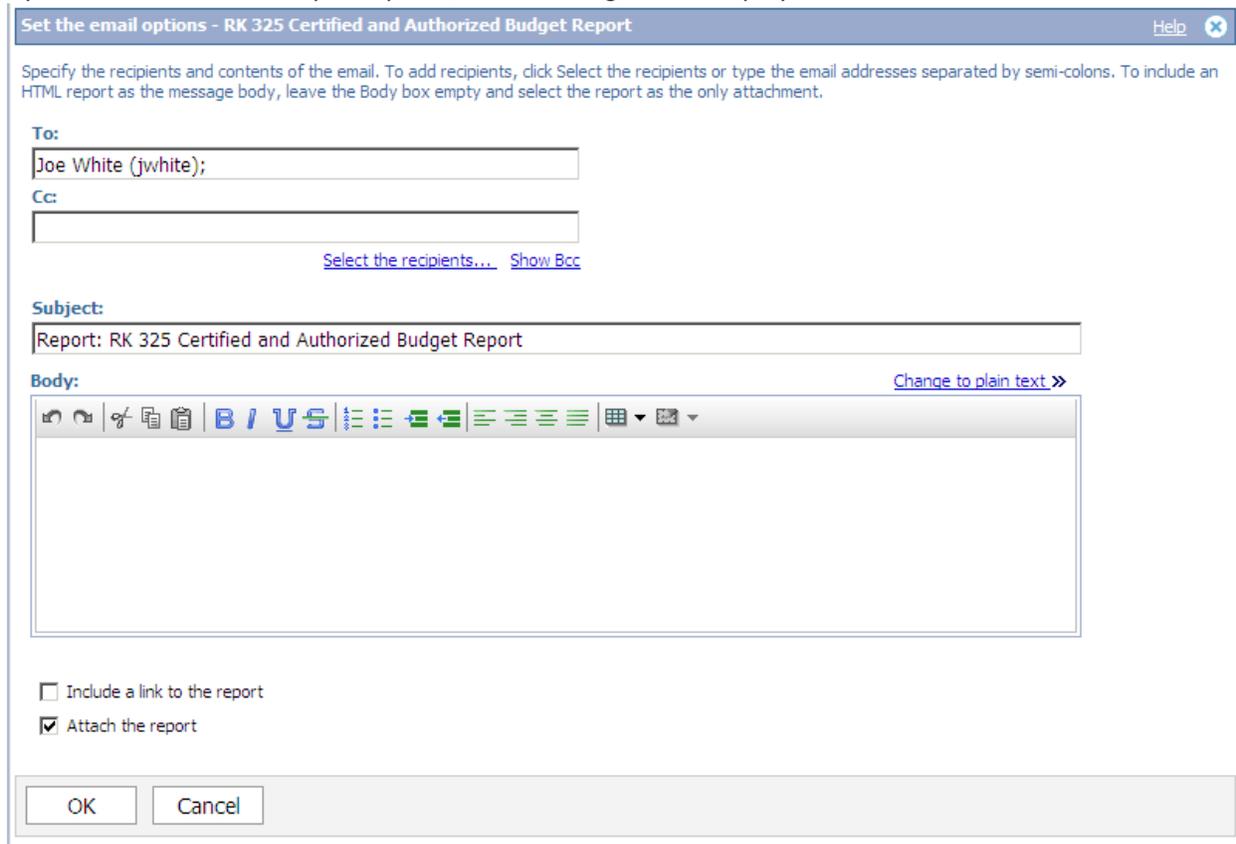
**Navigate the folders or search to find where you want to place the entry.**

  [Cognos](#) > [My Folders](#)

To rename the report, click under the Name header and change the report title. This may be useful when saving a new copy of the report to avoid overwriting an older version.

To save the report, select the desired location and click OK.

If you choose the Email Report option, the following will be displayed.



The screenshot shows a dialog box titled "Set the email options - RK 325 Certified and Authorized Budget Report". It contains the following fields and options:

- To:** A text box containing "Joe White (jwhite);".
- Cc:** An empty text box.
- Subject:** A text box containing "Report: RK 325 Certified and Authorized Budget Report".
- Body:** A rich text editor area with a toolbar and a large empty text area. A link "Change to plain text >>" is visible.
- Options:** Two checkboxes: "Include a link to the report" (unchecked) and "Attach the report" (checked).
- Buttons:** "OK" and "Cancel" buttons at the bottom.

By default, your name is displayed and the system will send this report to your email address.



The image shows a close-up of the "To:" field from the dialog box. The text "Joe White (jwhite);" is entered in the text box. A red arrow points from the right towards the text.

You may include multiple email addresses and separate entries by using the a semi-colon (;). "Select the recipients" is also an option, which will list other IBIS user who could receive the report from you.

The subject may be edited and text entered in the body field. These areas are shown below.

**Subject:**

**Body:** [Change to plain text >>](#)

Enter text here.

When you are satisfied with the window's content, click OK to send the report via email. If you do not wish to send the report via email, click Cancel.

If the [Select the recipients...](#) button is bypassed, the report will continue to run. When the report retrieval is complete, it will be displayed in this window. Most reports, including the RK325 shown below, default to a PDF.

IBM Cognos Viewer - RK 325 Certified and Authorized Budget Report

IBIS User3 Log Off IBM



**RK325-Budget Approved as of 04/18/2013**  
**Summary by Fund**  
**Biennium 2011-13**

**13900-Insurance - General Fund**

Fund Code	Fund Title	2011-12 Certified	2011-12 Authorized	2012-13 Certified	2012-13 Authorized
<b>Requirements</b>					
1100	ADMINISTRATION	\$6,521,829	\$6,522,979	\$6,636,152	\$6,685,916
1200	COMPANY SERVICES GROUP	\$7,759,327	\$7,729,141	\$7,922,823	\$7,876,885
1300	TECHNICAL SERVICES GROUP	\$6,497,213	\$19,750,973	\$7,928,738	\$20,451,038
1400	PUBLIC SERVICES	\$7,715,692	\$7,985,122	\$7,873,431	\$8,160,631
1500	OFFICE STATE FIRE MARSHA	\$15,038,011	\$15,499,192	\$15,242,808	\$15,920,775
1600	OMBUDSMEN SERVICES GROUP	\$22,611	\$5,417,980	\$266,197	\$6,179,763
1900	RESERVES AND TRANSFERS	\$328,227	\$328,227	\$628,227	\$628,227
<b>Requirements</b>		<b>\$43,882,910</b>	<b>\$63,233,614</b>	<b>\$46,498,376</b>	<b>\$65,903,235</b>
<b>Receipts</b>					

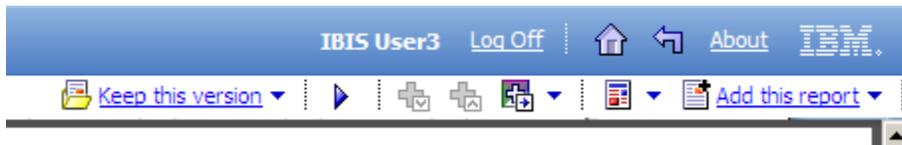
The report header will provide information, including the report title, the level of the report, the biennium and budget code. These headers may vary by report.

You can hover at the bottom of the page to see the following options.



From this menu, you can save the report, print the report, select a new page or decrease/increase the size of the report.

There are also several options displayed at the top right corner of the screen as shown below.



### Saving and Emailing a Specific Report

The  [Keep this version](#) link allows you to Email Report or Save as Report View. Both of these actions were described earlier in this user guide under [Select a delivery method](#), but the steps describe here are slightly different.

When you click on the “Keep this version” icon, you will receive the following two options:



If you choose the Save as Report View option, the following will be displayed.



You will be able to save the report run with the specific parameters chosen in the prompt page (you will be able save this exact report somewhere useful to you).

You can save reports in My Folders as shown below.

**Location:**

[Public Folders](#) > [Standard Reports](#)

[Select another location...](#) [Select My Folders](#)

If you wish to save the report in the Public Folder to have it accessible to other users, click Select another location. If you save in Public Folders, you must navigate to the Shared Workpalce. The path to Shared Workspace is shown below. The Department of Insurance is the example shown but this will show your organization based on your login credentials.

**Navigate the folders or search to find where you want to place the entry.**

  [Cognos](#) > [Public Folders](#) > [Department of Insurance](#) > [Shared Workspace](#)

If My Folders is chosen, the system will allow you to save the report in your own personal folder and it will not be accessible by other users. The path to My Folders is shown below.

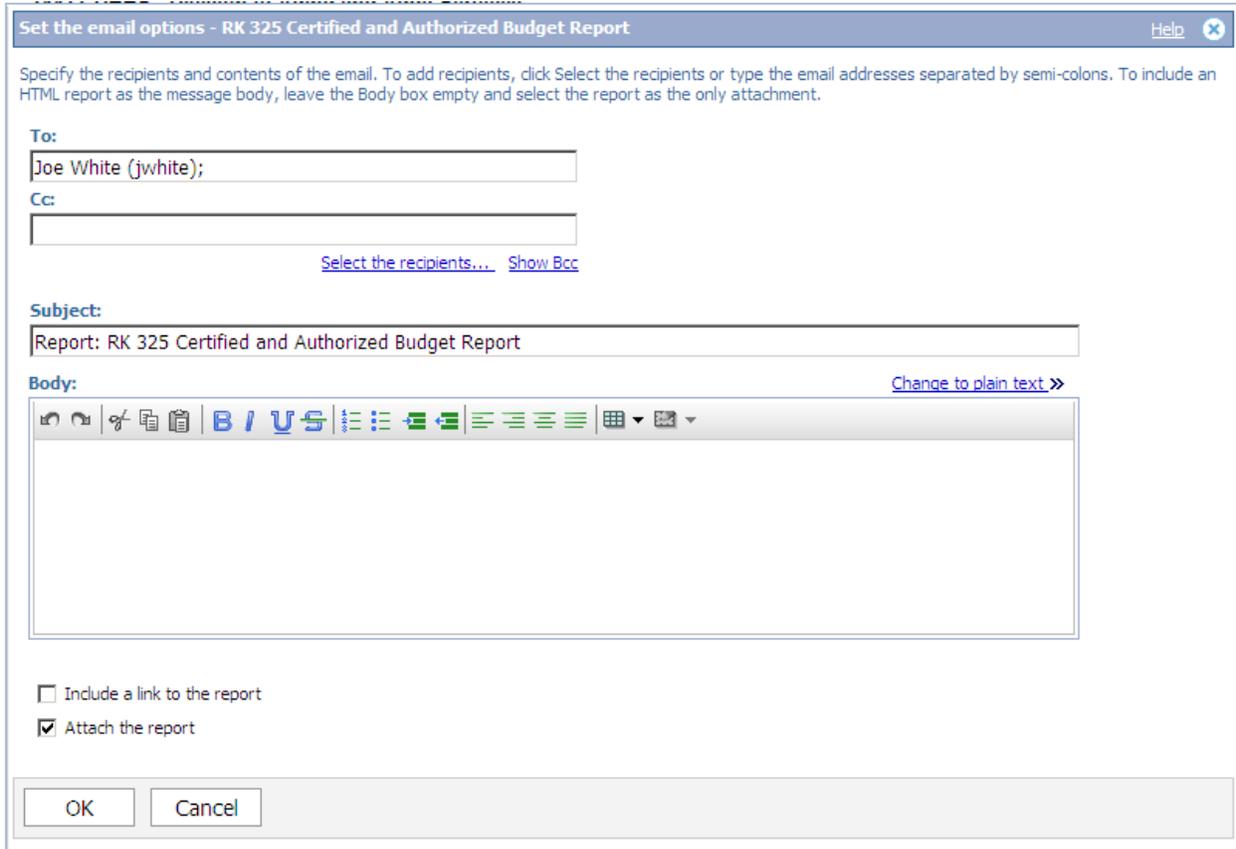
**Navigate the folders or search to find where you want to place the entry.**

  [Cognos](#) > [My Folders](#)

To rename the report, click under the Name header and change the report title. This may be useful when saving a new copy of the report to avoid overwriting an older version.

To save the report, select the desired location and click OK.

If you choose the Email Report option, the following will be displayed.



By default, your name is displayed and the system will send this report to your email address.



You may include multiple email addresses and separate entries by using the a semi-colon (;).

The subject may be edited and text entered in the body field. These areas are shown below.

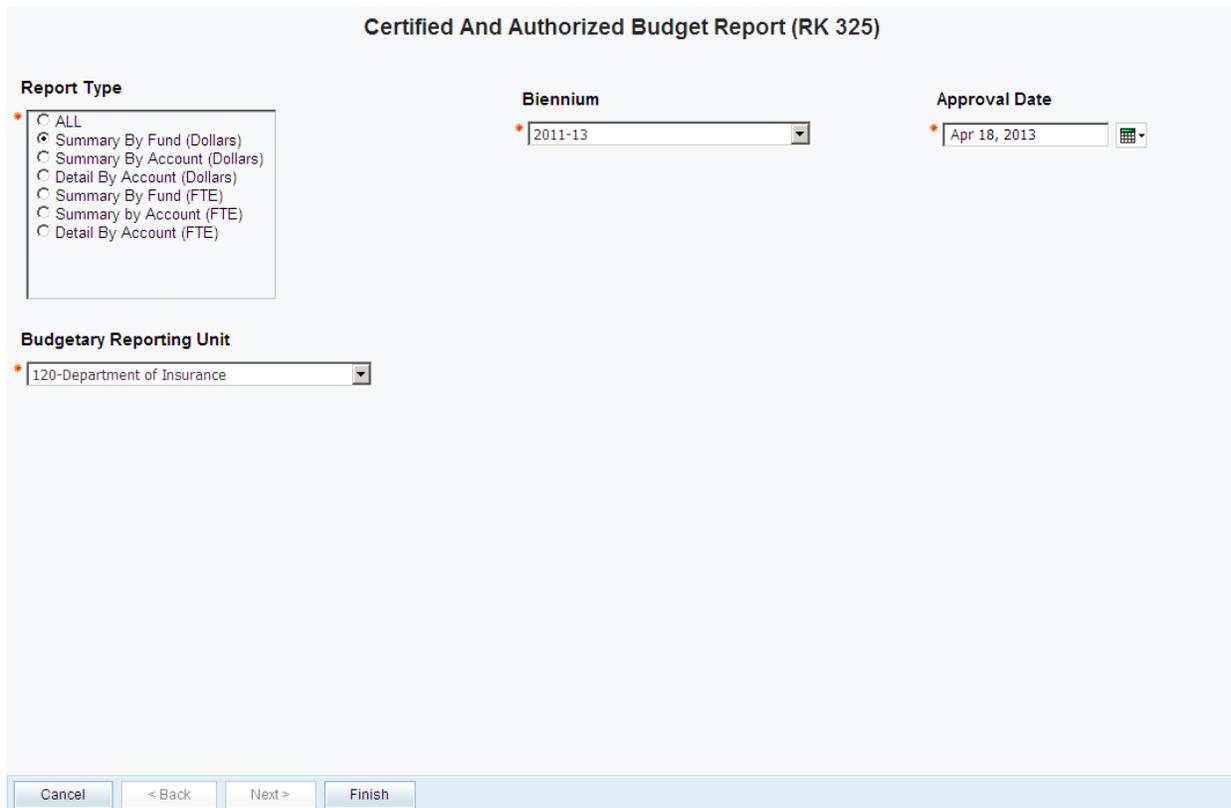


When you are satisfied with the window's content, click OK to send the report via email. If you do not wish to send the report via email, click Cancel.



### Report Options

The Run button  will return you to the prompt screen where you can select different criteria for the report.



**Certified And Authorized Budget Report (RK 325)**

**Report Type**

- ALL
- Summary By Fund (Dollars)
- Summary By Account (Dollars)
- Detail By Account (Dollars)
- Summary By Fund (FTE)
- Summary by Account (FTE)
- Detail By Account (FTE)

**Biennium**

**Approval Date**



**Budgetary Reporting Unit**

Cancel < Back Next > Finish

To produce a new report, select the new criteria and click Finish. Detailed steps will not be provided here since this process was described earlier in this user guide.

The Drill Down / Drill Up  icons are for drill up/down reports. Most IBIS reports will not have this functionality but it may grow over time.

The Go To  icon provides a search feature and related links.

The  icon allows you to change the report format. When selected the following list will be provided.



Below is a summary of the report format options. However, changing the output of the report may not be necessary because the System-Run Reports will provide reports in multiple formats, including PDF and Excel.

- **HTML:** The report is viewable in an internet browser, such as Internet Explorer. This produces a report quickly but has limitations when it comes to navigating page to page.
- **PDF:** The report is viewable in Adobe Acrobat Reader. This is the default report format for most IBIS reports. This report provides easy navigation but does not generate as quickly at HTML.
- **XML:** The report can be imported into an application. This option is mainly used by software developers and is not recommended for the regular IBIS user.
- **Excel:** The report is viewable in Excel 2007 or Excel 2002. The report is also available in CSV (Delimited text), which can be viewed in many applications but will not retain any formatting such as spaces or graphics.

If  [View in HTML Format](#) is selected, you will receive a report in HTML format as shown below.

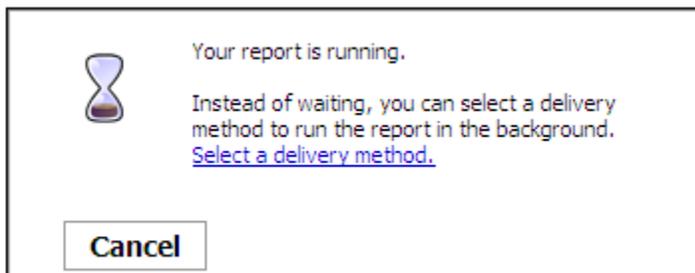
IBM Cognos Viewer - RK 325 Certified and Authorized Budget Report					
RK325-Budget Approved as of 04/18/2013 Summary by Fund Biennium 2011-13					
Fund Code	Fund Title	2011-12 Certified	2011-12 Authorized	2012-13 Certified	2012-13 Authorized
<b>13900-Insurance - General Fund</b>					
<b>Requirements</b>					
1100	ADMINISTRATION	\$6,521,829	\$6,522,979	\$6,636,152	\$6,685,916
1200	COMPANY SERVICES GROUP	\$7,759,327	\$7,729,141	\$7,922,823	\$7,876,885
1300	TECHNICAL SERVICES GROUP	\$6,497,213	\$19,750,973	\$7,928,738	\$20,451,038
1400	PUBLIC SERVICES	\$7,715,692	\$7,985,122	\$7,873,431	\$8,160,631
1500	OFFICE STATE FIRE MARSHA	\$15,038,011	\$15,499,192	\$15,242,808	\$15,920,775
1600	OMBUDSMEN SERVICES GROUP	\$22,611	\$5,417,980	\$266,197	\$6,179,763
1900	RESERVES AND TRANSFERS	\$328,227	\$328,227	\$628,227	\$628,227
<b>Requirements</b>		<b>\$43,882,910</b>	<b>\$63,233,614</b>	<b>\$46,498,376</b>	<b>\$65,903,235</b>
<b>Receipts</b>					
1100	ADMINISTRATION	\$116,151	\$116,151	\$118,366	\$118,366
1200	COMPANY SERVICES GROUP	\$162,516	\$162,516	\$162,516	\$162,516
1300	TECHNICAL SERVICES GROUP	\$792,106	\$15,374,568	\$2,127,562	\$15,978,564
1400	PUBLIC SERVICES	\$1,324,783	\$1,594,213	\$1,335,583	\$1,622,783
1500	OFFICE STATE FIRE MARSHA	\$4,520,382	\$5,014,275	\$4,591,727	\$5,319,458
1600	OMBUDSMEN SERVICES GROUP	\$0	\$4,004,919	\$55,958	\$4,594,884
<b>Receipts</b>		<b>\$6,915,938</b>	<b>\$26,266,642</b>	<b>\$8,391,712</b>	<b>\$27,796,571</b>
<b>Net Appropriation</b>		<b>\$36,966,972</b>	<b>\$36,966,972</b>	<b>\$38,106,664</b>	<b>\$38,106,664</b>

In order to see the next page of the report, you will need to click the options at the bottom of the page.

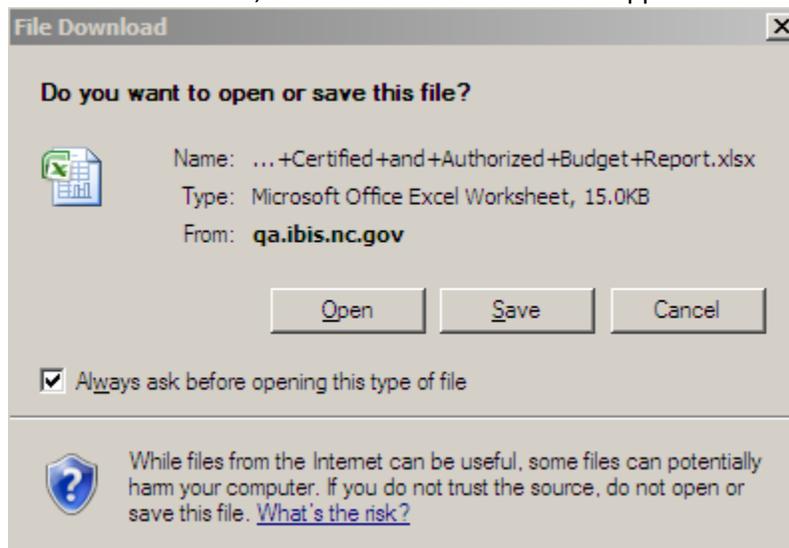
If you wish to run a report in Excel, you will have the following options.

-  [View in Excel 2007 Format](#)
-  [View in Excel 2002 Format](#)
-  [View in CSV Format](#)

For this example, the  [View in Excel 2007 Format](#) option is selected. When selected, a new window will appear with a message stating your report is running.



After a few moments, a File Download window will appear as shown below.

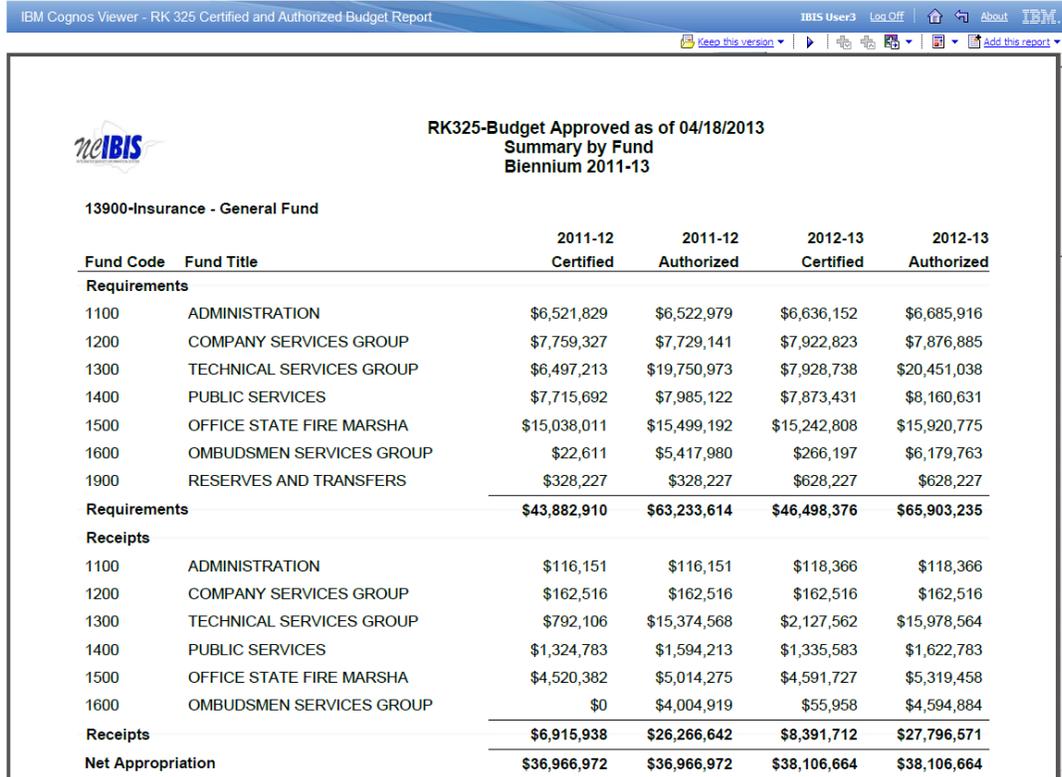


Click Open to open the file immediately. Click Save to save the file to your computer and open from the saved location. TIP: Saving the file and opening from the saved location may be a faster option than opening the file directly.

The file can be opened from the window or the saved location. When the file opens, it will display a formatted Excel version of the report. There will be individual tabs for each different Report Type.

	A	B	C	D	E	F
1			RK325-Budget Approved as of 04/19/2013			
2			Summary by Fund			
3			Biennium 2011-13			
4	13900-Insurance - General Fund					
5			2011-12	2011-12	2012-13	2012-13
6	Fund Code	Fund Title	Certified	Authorized	Certified	Authorized
7	<b>Requirements</b>					
8	1100	ADMINISTRATION	\$6,521,829	\$6,522,979	\$6,636,152	\$6,685,916
9	1200	COMPANY SERVICES GROUP	\$7,759,327	\$7,729,141	\$7,922,823	\$7,876,885
10	1300	TECHNICAL SERVICES GROUP	\$6,497,213	\$19,750,973	\$7,928,738	\$20,451,038
11	1400	PUBLIC SERVICES	\$7,715,692	\$7,985,122	\$7,873,431	\$8,160,631
12	1500	OFFICE STATE FIRE MARSHA	\$15,038,011	\$15,499,192	\$15,242,808	\$15,920,775
13	1600	OMBUDSMEN SERVICES GROUP	\$22,611	\$5,417,980	\$266,197	\$6,179,763
14	1900	RESERVES AND TRANSFERS	\$328,227	\$328,227	\$628,227	\$628,227
15	<b>Requirements</b>		<b>\$43,882,910</b>	<b>\$63,233,614</b>	<b>\$46,498,376</b>	<b>\$65,903,235</b>
16	<b>Receipts</b>					
17	1100	ADMINISTRATION	\$116,151	\$116,151	\$118,366	\$118,366
18	1200	COMPANY SERVICES GROUP	\$162,516	\$162,516	\$162,516	\$162,516
19	1300	TECHNICAL SERVICES GROUP	\$792,106	\$15,374,568	\$2,127,562	\$15,978,564
20	1400	PUBLIC SERVICES	\$1,324,783	\$1,594,213	\$1,335,583	\$1,622,783
21	1500	OFFICE STATE FIRE MARSHA	\$4,520,382	\$5,014,275	\$4,591,727	\$5,319,458
22	1600	OMBUDSMEN SERVICES GROUP	\$0	\$4,004,919	\$55,958	\$4,594,884
23	<b>Receipts</b>		<b>\$6,915,938</b>	<b>\$26,266,642</b>	<b>\$8,391,712</b>	<b>\$27,796,571</b>
24	<b>Net Appropriation</b>		<b>\$36,966,972</b>	<b>\$36,966,972</b>	<b>\$38,106,664</b>	<b>\$38,106,664</b>
25	04/19/2013 10:14:47 AM					
26	Page 1 of 2					
27						

If  [View in PDF Format](#) is selected, you will receive a report in PDF format as shown below.



IBM Cognos Viewer - RK 325 Certified and Authorized Budget Report

IBIS User3 | Log Off | About IBM

**RK325-Budget Approved as of 04/18/2013**  
Summary by Fund  
Biennium 2011-13

**13900-Insurance - General Fund**

Fund Code	Fund Title	2011-12 Certified	2011-12 Authorized	2012-13 Certified	2012-13 Authorized
<b>Requirements</b>					
1100	ADMINISTRATION	\$6,521,829	\$6,522,979	\$6,636,152	\$6,685,916
1200	COMPANY SERVICES GROUP	\$7,759,327	\$7,729,141	\$7,922,823	\$7,876,885
1300	TECHNICAL SERVICES GROUP	\$6,497,213	\$19,750,973	\$7,928,738	\$20,451,038
1400	PUBLIC SERVICES	\$7,715,692	\$7,985,122	\$7,873,431	\$8,160,631
1500	OFFICE STATE FIRE MARSHA	\$15,038,011	\$15,499,192	\$15,242,808	\$15,920,775
1600	OMBUDSMEN SERVICES GROUP	\$22,611	\$5,417,980	\$266,197	\$6,179,763
1900	RESERVES AND TRANSFERS	\$328,227	\$328,227	\$628,227	\$628,227
<b>Requirements</b>		<b>\$43,882,910</b>	<b>\$63,233,614</b>	<b>\$46,498,376</b>	<b>\$65,903,235</b>
<b>Receipts</b>					
1100	ADMINISTRATION	\$116,151	\$116,151	\$118,366	\$118,366
1200	COMPANY SERVICES GROUP	\$162,516	\$162,516	\$162,516	\$162,516
1300	TECHNICAL SERVICES GROUP	\$792,106	\$15,374,568	\$2,127,562	\$15,978,564
1400	PUBLIC SERVICES	\$1,324,783	\$1,594,213	\$1,335,583	\$1,622,783
1500	OFFICE STATE FIRE MARSHA	\$4,520,382	\$5,014,275	\$4,591,727	\$5,319,458
1600	OMBUDSMEN SERVICES GROUP	\$0	\$4,004,919	\$55,958	\$4,594,884
<b>Receipts</b>		<b>\$6,915,938</b>	<b>\$26,266,642</b>	<b>\$8,391,712</b>	<b>\$27,796,571</b>
<b>Net Appropriation</b>		<b>\$36,966,972</b>	<b>\$36,966,972</b>	<b>\$38,106,664</b>	<b>\$38,106,664</b>

The  [Add this report](#) icon allows you to save a shortcut of the report to a folder, such as My Folders. The shortcut will bring you to the prompt page to run a new report. This may be helpful if you want to run a report in a location other than the default settings of IBIS reports.

The Return  icon will return you to folders where the report was selected.

The Home  icon will return you to home page within IBIS reports.

## RUN WITH OPTIONS

The system allows you to be proactive when generating reports. If, for example, you wish to receive a report in a particular format (i.e Excel) and in a certain way (i.e. email), then you can use the Run with Options functionality to set the system to deliver a report in the format and method desired. In the example below, the user guide will walk through the Run with Options feature for the RK325.

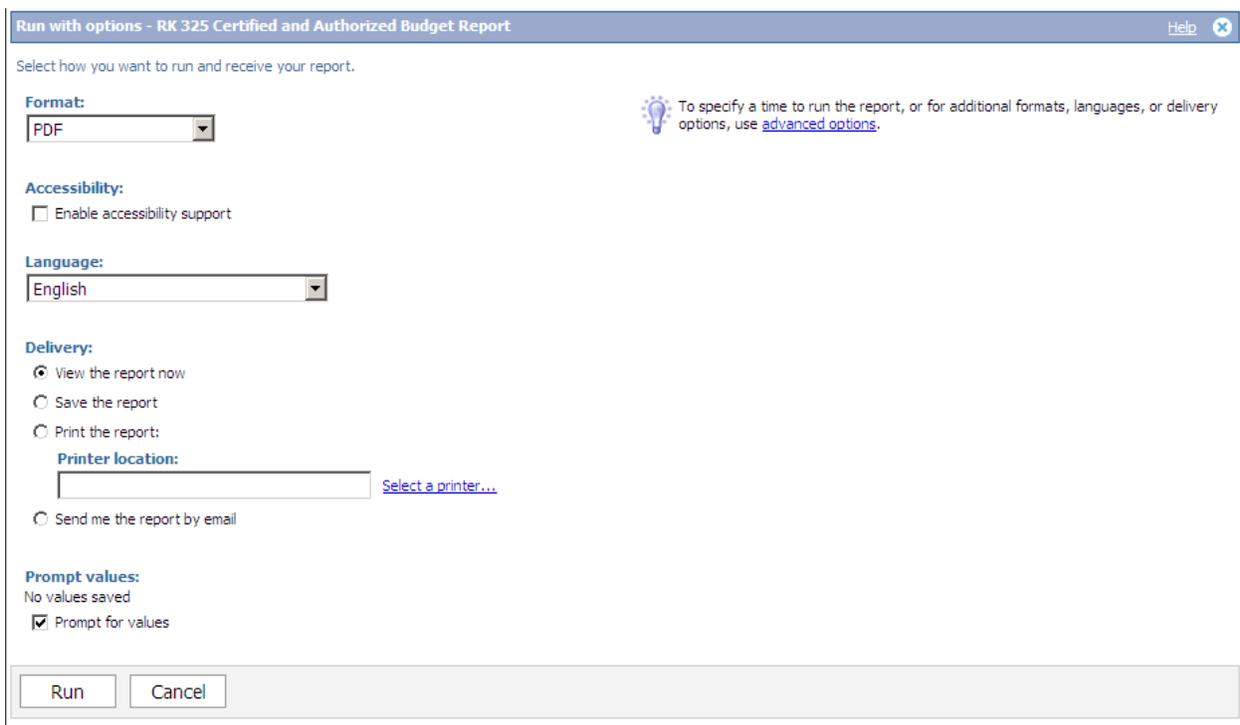
Navigate to the Budget Execution Reports folder from Self Service Reports. You will use the path listed below.

[Public Folders](#) > [Self Service Reports](#) > [Budget Execution Reports](#)

Locate the RK325 Certified and Authorized Budget Report line and the “Run with options”  icon on the right side of the screen. This is highlighted below.



Click on the “Run with options”  icon and you will see a new window appear, which is displayed below.



A screenshot of a dialog box titled 'Run with options - RK 325 Certified and Authorized Budget Report'. The dialog box contains the following sections:

- Format:** A dropdown menu set to 'PDF'.
- Accessibility:** A checkbox labeled 'Enable accessibility support' which is unchecked.
- Language:** A dropdown menu set to 'English'.
- Delivery:** Three radio buttons: 'View the report now' (selected), 'Save the report', and 'Print the report:'. Below the 'Print the report:' option is a text box for 'Printer location:' with a 'Select a printer...' link.
- Send me the report by email:** A radio button which is unchecked.
- Prompt values:** A section with 'No values saved' and a checked checkbox 'Prompt for values'.

At the bottom of the dialog box are two buttons: 'Run' and 'Cancel'.

Under the Format option, you have several choices such as PDF, Excel, and HTML. Select the desired format. In the example, Excel 2007 is selected.

**Format:**

Excel 2007

Under the Delivery option, you have the option to view the report now, print, or send by email. Select your delivery option. In the example, email is selected. If email is chosen, then the system will generate an email to you with the report attached.

Send me the report by email

The final section is Prompt Values. Keep the default checkmark. This will allow you to set the parameters of the report you about to generate.

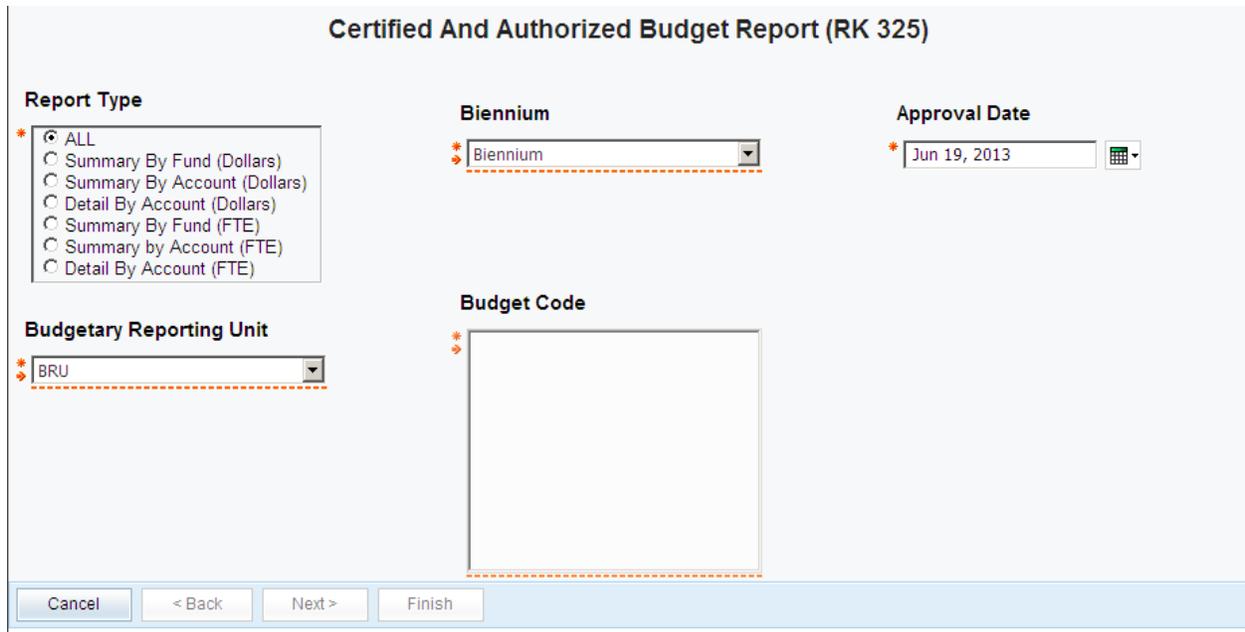
**Prompt values:**

No values saved

Prompt for values

When complete, click Run at the bottom of the screen. If wish to cancel the action, simply click Cancel and you will be returned to the Budget Execution Reports folder.

Upon clicking Run, you will receive a prompt screen as shown below.



**Certified And Authorized Budget Report (RK 325)**

**Report Type**

- \*  ALL
- Summary By Fund (Dollars)
- Summary By Account (Dollars)
- Detail By Account (Dollars)
- Summary By Fund (FTE)
- Summary by Account (FTE)
- Detail By Account (FTE)

**Biennium**

\*

**Approval Date**

\*

**Budgetary Reporting Unit**

\*

**Budget Code**

\*

Cancel   < Back   Next >   Finish

Complete the [prompt screen as described earlier in this user guide](#) and click Finish when you are complete.

After you click Finish, you will receive the following information screen that summarizes your actions. Click OK and the report will be emailed to you in the format you selected. You will be returned to the folder where you selected the report.

IBM Cognos software



You selected to run 'RK 325 Certified and Authorized Budget Report' as follows:

- Time: now
- Formats: Excel 2007
- Languages: English
- P\_bru: '040-Office of the Lieutenant Governor'
- p\_report: 'ALL'
- p\_biennium: '2011-13'
- p\_appdate: 'Jun 19, 2013'
- p\_budget: '13100-OFFICE OF LT. GOVERNOR-GE'
- Send the report by email : Joe White (jwhite)

View the details of this report after closing this dialog

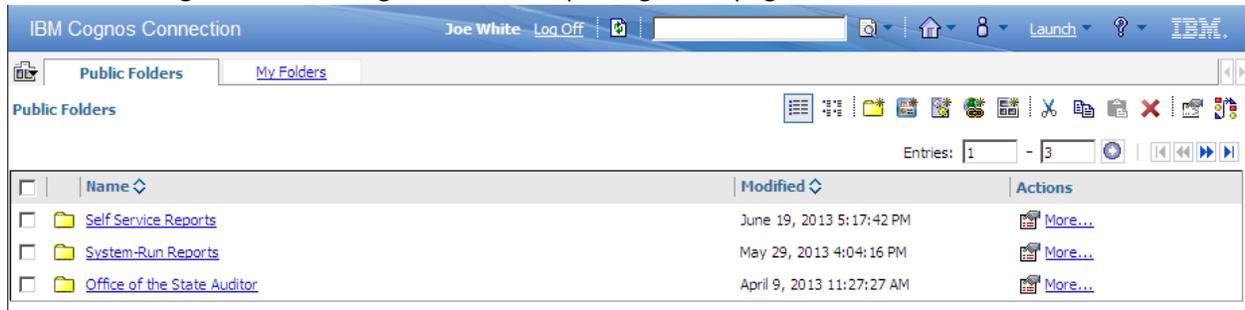
Click OK to submit the report or click Cancel to return to your selection.

Show this dialog in the future

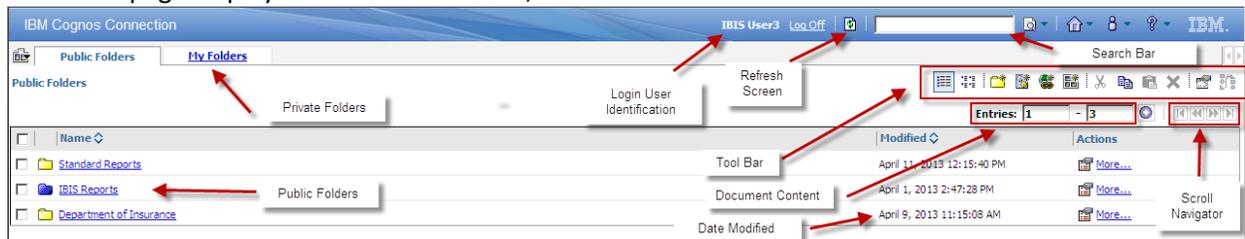
OK
Cancel

## HOW TO MANAGE REPORTS

This section begins with showing the default Reporting home page.



The home page displays several action icons, which are defined in the screen shot below.



On the upper right hand side of the screen is user identification display and the log off feature. Click Log Off if you wish to exit the system. This will log you out of IBIS.



### Search Bar

The search bar is located next to the log off feature. There are several options that you can use to search for reports and folders. Typing key word(s) and clicking the magnifying glass will initiate a search for reports, files or folders within the Public Folders and My Folders. Selecting the dropdown arrow will bring you to another search bar with both simple and advanced search features.



### Set Home Page

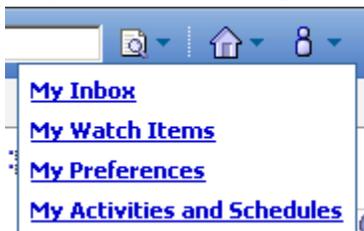
Selecting the Home icon  will display a dropdown list with “Home” or “Set View as Home” as choices.



Clicking “Home” will navigate back to your IBIS Reports homepage. Clicking “Set View as Home” will set whichever page you are currently viewing to become your new home page. TIP: Any folder level within the Public Folder or My Folder tab can be set as a IBIS Reports homepage.

### Set up My Area – Set Preferences

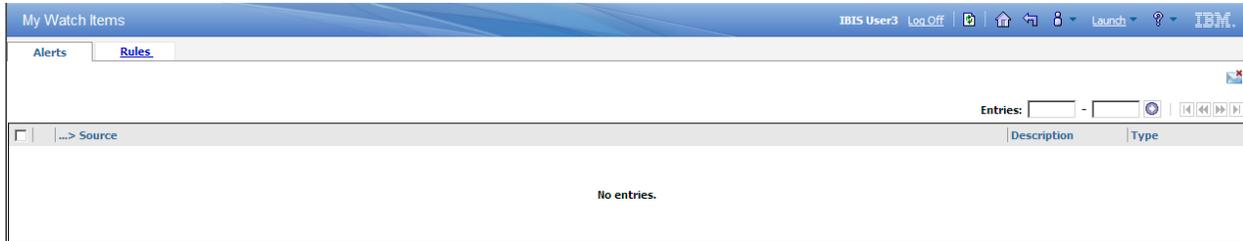
My Area Options  allows you to set preferences and activity settings. Clicking on the icon will bring forth the following display.



Each option is described below:

- **My Inbox:** This option brings you to a personal Inbox. This is new functionality from IBM and should be bypassed for the time being in IBIS Reports.

- My Watch Items:** Any report that is added to your watch list will be displayed on the Alerts tab screen. An email notification will be sent to you when new versions of reports that have been added to the watch list become available. TIP: To access watched files, locate the file in the appropriate folder.



- My Preferences:** Personal preferences can be customized such as the number of items that can be viewed in public and private folders, report output formats (PDF, HTML, Excel), and portal view preferences. The following are highlights of settings that can be adjusted followed by a screen shot of the preferences page.

**General Preferences:** Set the view preferences and output settings for IBIS Reports.

- Number of entries in list view: Displays the number of items to appear on the screen. The maximum number of entries is 999.
- Separators in list view: Displays files and folders in gridlines, alternating backgrounds, or no separator screens.
- Style: Changes the style templates within IBIS Reports.
- Report format: Set the default report format for all reports (PDF, HTML, Excel).
- Show the welcome page at startup – Choose to display or not to display the welcome page when IBIS Reports starts.
- Show a summary of the run options: Display a summary of run options when executing reports.
- Default view: The list view stacks folders and files on top of each other. The detailed view creates large icons separated in columns and provides details about an item whenever available.
- Number of columns in detail view: This will display the amount of columns in the display view.
- Regional options: Set your language preferences. The default setting is recommended.
- Time zone: This setting sets your location time. The default settings should remain.

Set preferences

General
Personal
Portal Tabs

Specify your settings.

**Number of entries in list view:**

**Separators in list view:**

**Style:**  
 [Preview](#)

Show hidden entries

**Report format:**

Show the Welcome page at startup

Show a summary of the run options

Enable accessibility support for reports I run or schedule

---

**Portal**

**Default view:**  
 List  
 Details

**Number of columns in details view:**

---

**Regional options**

**Product language:**  
 Use the default language

**Content language:**  
 Use the default language

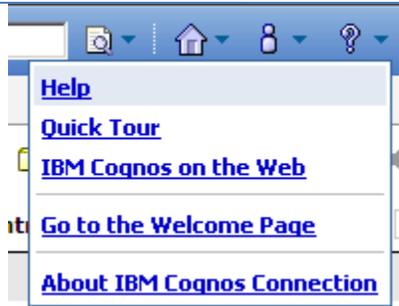
**Personal Preferences:** This page primarily describes the IBIS Report user information. The default setting is recommended.

**Portal Tabs Preferences:** Similar to the “Public Folders” and “My Folders” tabs, adding, removing or changing the order of IBIS Report tabs can be set here. There are limitations on what changes can occur, however.

My Activities and Schedules | [My Activities and Schedules](#) under My Area Options  is a central location to monitor scheduled reports. You can monitor current, past, and upcoming report activities. Report schedules can also be enabled, disabled, and modified here.

### IBIS Report Help

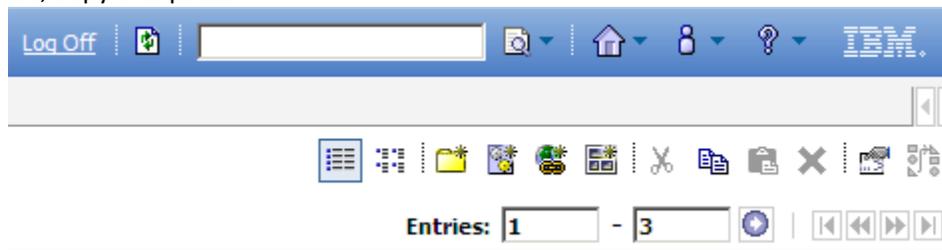
The Help icon  will access the help menu. The following options will be displayed the the icon is clicked.



Clicking [Help](#) will provide access to the latest IBM manual. The Quick Tour allows for a tutorial of the IBM Cognos software that is used for IBIS reports.

**Tool Bar**

There are several action icons, including a tool bar, displayed in the upper righthand corner of the screen. This tool bar is intended to help you organize your IBIS Reports and folders. You modify certain features and add, remove or move reports in your Shared Workspace or My Folders with features like cut, copy and paste.

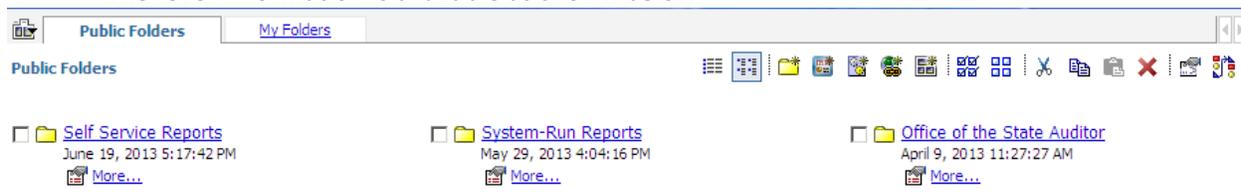


The features are summarized below.

- 
 List View : Displays files and folders in rows as shown below.

<input type="checkbox"/>	Name	Modified	Actions
<input type="checkbox"/>	<a href="#">Self Service Reports</a>	June 19, 2013 5:17:42 PM	<a href="#">More...</a>
<input type="checkbox"/>	<a href="#">System-Run Reports</a>	May 29, 2013 4:04:16 PM	<a href="#">More...</a>
<input type="checkbox"/>	<a href="#">Office of the State Auditor</a>	April 9, 2013 11:27:27 AM	<a href="#">More...</a>

- 
 Detailed View: Displays larger icons separated in columns and provides details about items whenever information is available as shown below.



-  **New Folder:** Creates new folders. This option is restricted to the Shared Workspace in Public Folders and My Folders.
-  **New Job:** Allows for the scheduling of multiple reports to run sequentially or concurrently. You can select which reports to run, if you want the action to be one-time or scheduled, and if scheduled then the frequency (daily, weekly, monthly, etc).
-  **New URL:** Creates website links that can be shared with others.
-  **New Page:** Creates a new portal page that can contain multiple parts.
-  **Cut, Copy, Paste and Delete:** The buttons will only be activated for Shared Workspace and My Folders.
  - **Cut:** Move files or folders.
  - **Copy:** Duplicates files or folders to be moved.
  - **Paste:** Place cut or copied items into a selected location.
  - **Delete:** Removes selected files or folders.
-  **Set Properties:** Allows you to set property preferences for folders.
-  **Order:** Allows you to display files or folders in specific sequences.

### Creating a New Folder

You have the ability to modify Shared Workspace and My Folders within IBIS Reports by adding new folders. To modify these areas, navigate to them within the system. This example uses My Folders.

Click the new folder icon  as shown below.



Clicking the new folder icon will make the following window appear.

Specify a name and description - New Folder wizard

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

Name:

Description:

Screen tip:

Location:

Public Folders

[Select another location...](#) [Select My Folders](#)

Cancel

< Back

Next >

Finish

Enter a name for the folder in the Name field. Enter any other additional information desired on the screen such as a description or screen tip.

Specify a name and description - New Folder wizard

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

Name:

Description:

Screen tip:

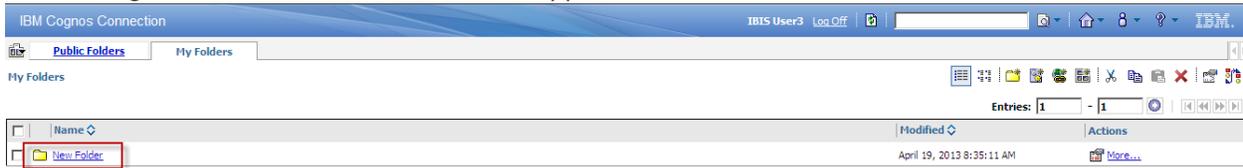
The location of the new folder is shown in the Location field. If a different location is desired, click the [Select another location](#) link and select another location for the folder. Remember, new folders may only be set up in My Folders or in the Shared Worked space of the Public Folders.

Location:

**My Folders**

[Select another location...](#)

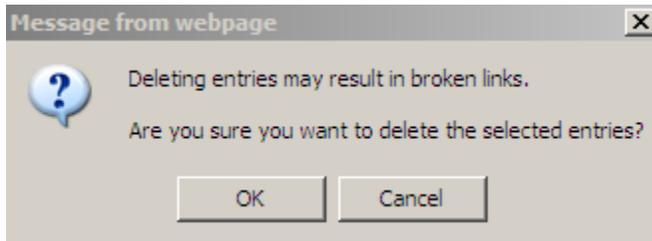
When you are satisfied with the folder's location, click Finish. This will close the window and return you to the navigation screen. The new folder will appear as shown below.



### Deleting a Report or Folder

To delete a report or a folder, check the folder you wish to delete and click the Delete icon. ❌ You may delete folders in the Shared Workspace or My Folders only.

You may receive the following message. If you wish to delete the folder, click OK. Be cautious about deleting folders because there may be important content within the folder.



### Cut, Copy and Pasting a Report/Folder

To cut, copy and paste a report/folder, go to the folder where the report resides. Remember, this action is only permissible in the Shared Workspace or My Folders Check the checkboxes to the left of the report(s) or folder(s) desired as shown below. The example used is for reportst within the Shared Workspace.



Click the desired option: cut or copy. ✂ 📄

Next, navigate to the desired folder where you wish to place the report or folder. Click the paste icon 📄 to place the cut or copied report(s) or folder(s) in the selected location.



## Report Action Items

There are several action items associated with each report as shown below.



The features are summarized below.

-  Set Properties: Allows you to adjust property settings for reports.
-  Run with options: Allows you to generate a report on a one-time basis in any format with the options to view, print or email the report. [Refer to the Run with Option section for more information.](#)
-  Create a report view of this report: Allows you to create different versions of a report using the underlying structure of the original report but display the view in a format you choose. You can create a report view and save it in Shared Workspace or My Folders.
-  View the schedule: Allows you to view any scheduled runs of the report.
-  View run history: Allows you to view the request, start, and completion time for historical versions of the report.
-  Do not alert any about new versions: Allows to disable a report's alert if activated.