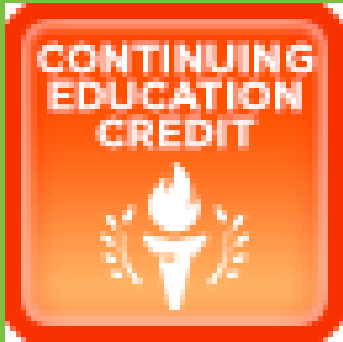


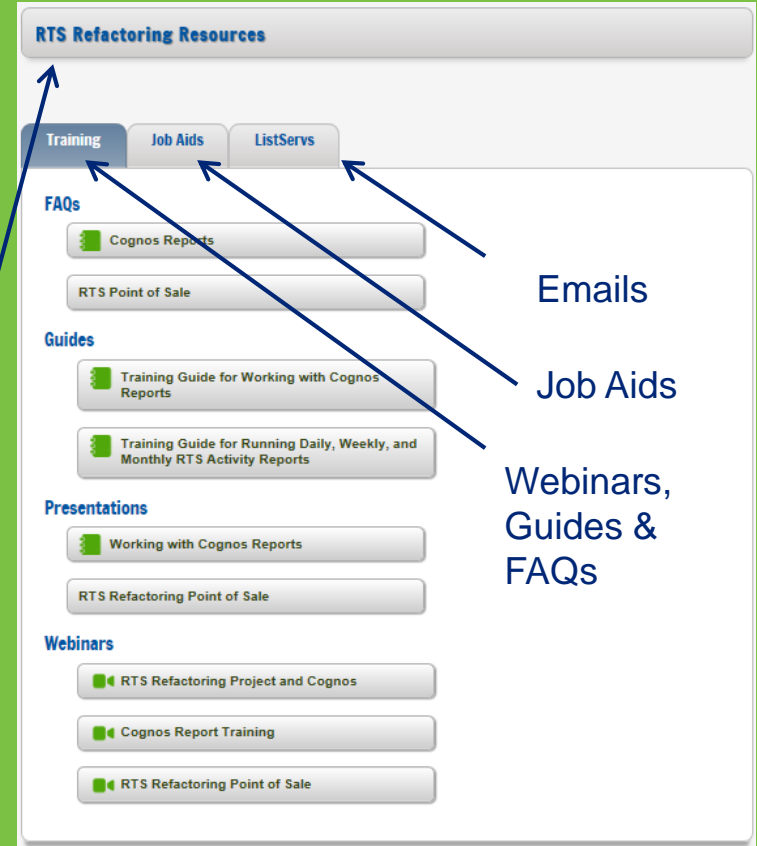
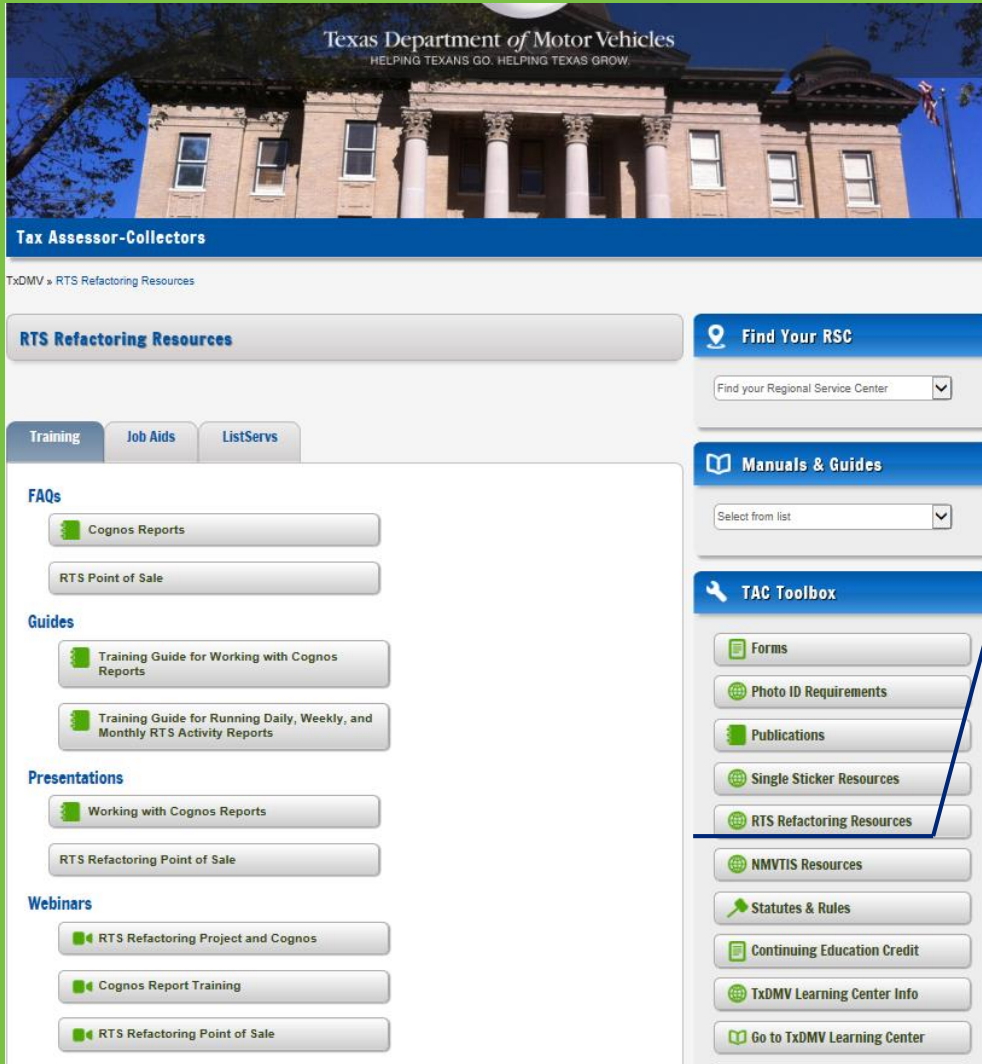
# The RTS Refactoring Webinar - Reports



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



Welcome

# RTS Refactoring Project Working with Cognos Reports



Texas Department  
*of* Motor Vehicles

# Agenda

# Agenda

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



# Training Objectives

# Objectives

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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

## Current System

- Reports are automatically printed on a predetermined schedule
- Reports cannot be exported to other formats
- Reports are limited to a predetermined date range
- Reports cannot be filtered for specific items

TxDMV  
Refactoring

## Benefits of the New Enterprise Reporting System

- You can access reports on demand via Cognos
- 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
- You can select specific date/date ranges
- You can filter or search for specific items within a report (e.g. fees, funds, transaction IDs, etc.)
- Some reports will be consolidated for your convenience (e.g. day, week, month fees reports)

**Affects mainframe download reports only**



# Cognos Basics

# Accessing Cognos from your RTS Workstation



# Accessing Cognos



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

A screenshot of the TxDMV - RTS login page. At the top left is the Texas Department of Motor Vehicles logo. The main heading is "TxDMV - RTS". Below it are two input fields: "User Name:" and "Password:". Below the password field is an orange "LOG IN" button. At the bottom, there is a copyright notice: "Copyright © 2014 Texas Department of Motor Vehicles. All rights reserved. - 4000 Jackson Ave, Austin, TX 78731".

# Accessing Cognos



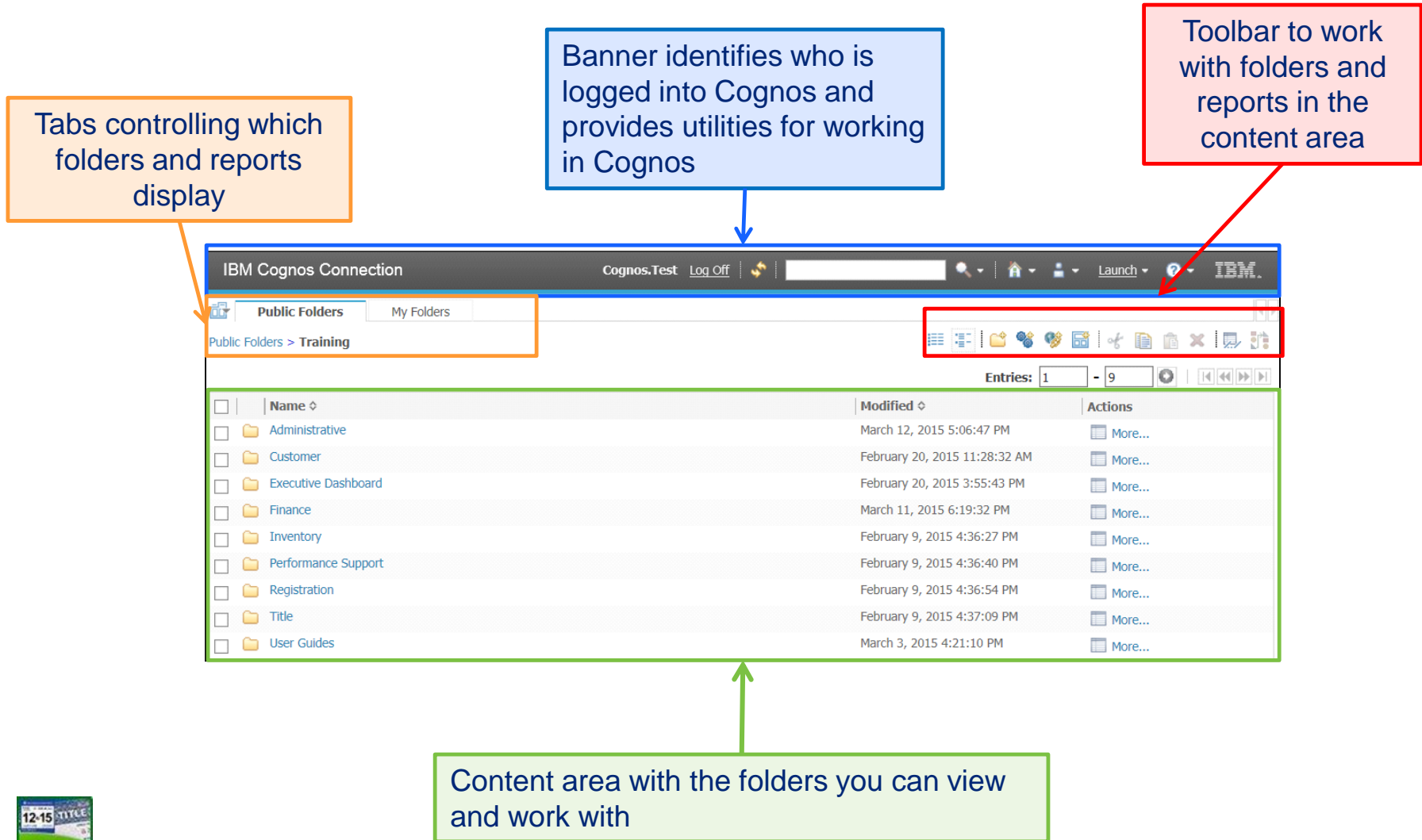
Options available are based on log in permissions.

Click My Home to go to your Home Page.



Click the box to skip this screen in the future

# The Home Page



# 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

1. **Public Folders**

Name	Modified	Actions
Administrative	March 16, 2015 11:00:23 AM	More...
Finance	March 10, 2015 3:36:23 PM	More...
Inventory	February 9, 2015 4:36:27 PM	More...
Performance Support	February 9, 2015 4:36:40 PM	More...
Title		
User Gu		

2. **Public Folders > Finance**

Name	Modified	Actions
\$5 Buyer Tag Fees Report	March 18, 2015 10:18:58 AM	More...
CRBF Report	March 18, 2015 12:53:22 PM	More...



# 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

Texas Department of Motor Vehicles

Registration & Title System

MONTHLY FUNDS REPORT

RTS.FIN.009

Select Year \* 2015

Select Month \* January

Select County \*

- 001 - ANDERSON
- 002 - ANDREWS
- 003 - ANGELINA
- 004 - ARANSAS
- 005 - ARCHER
- 006 - ARMSTRONG
- 007 - ATASCOSA
- 008 - AUSTIN
- 009 - BAILEY
- 010 - BANDERA
- 011 - BASTROP

Select Account Item Code

- REGISTRATION EMISSIONS FEE
- SALES TAX FEE
- SALES TAX EMISSIONS FEE
- SALES TAX EMISSION FEE 1%
- SALES TAX PENALTY FEE
- TERP FEE
- TEXAS MOBILITY FUND FEE
- YOUNG FARMER PROGRAM

Cancel Finish

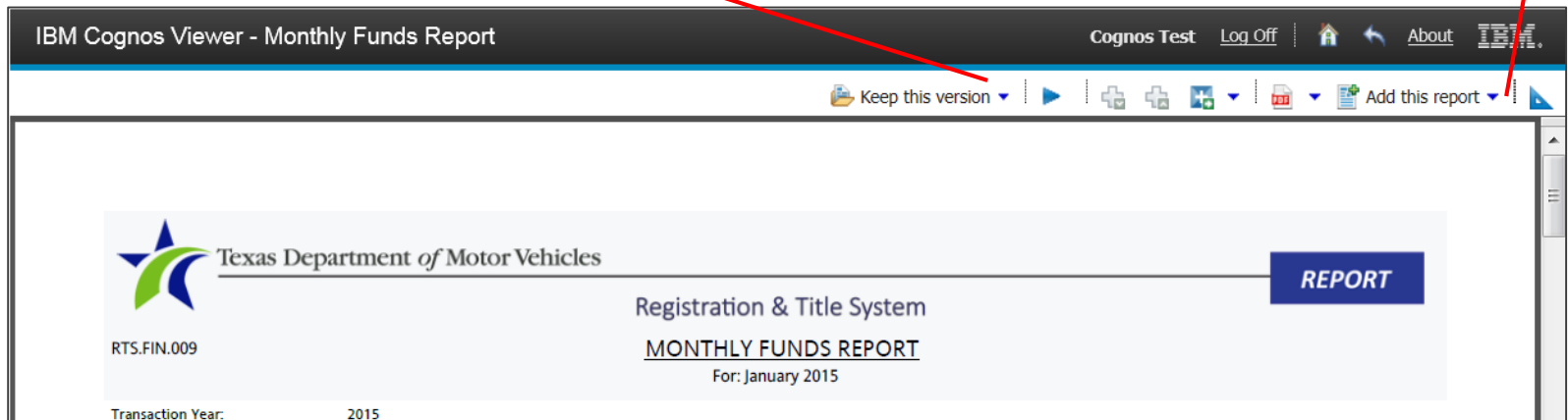
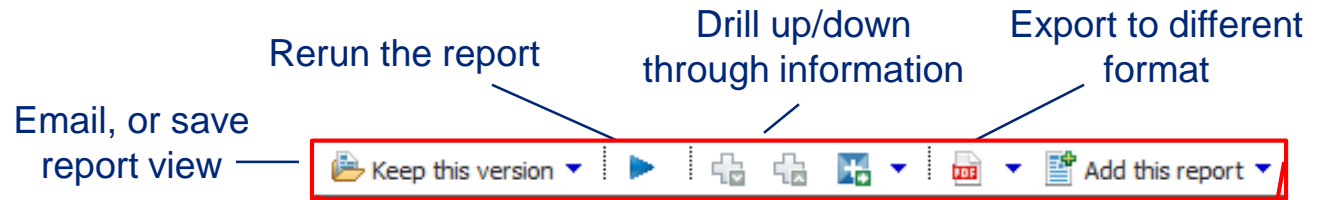
For more detailed information about report prompts, refer to the Training Guide.



# Understanding the Reports Toolbar



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



# Using the Adobe Toolbar



IBM Cognos Viewer - Monthly Funds Report

001-Test Log Off | Home | About IBM

Zoom to make text larger or smaller.

Save the PDF.

Print the PDF.

Dock this toolbar to this PDF so it remains visible.

Texas Department of Motor Vehicles


REPORT



# Viewing Generated Reports



Here is an example of a report in PDF view


**Texas Department of Motor Vehicles**
**REPORT**

Registration & Title System  
**MONTHLY FUNDS REPORT**  
 For: January 2015

RTS.FIN.009  
 Transaction Year: 2015  
 Transaction Month: January  
 Office: 002 - ANDREWS  
 Account Item Code: SALES TAX FEE , SALES TAX PENALTY FEE , TEXAS MOBILITY FUND FEE , YOUNG FARMER PROGRAM

Monthly Totals				
County	SALES TAX FEE	SALES TAX PENALTY FEE	TEXAS MOBILITY FUND FEE	YOUNG FARMER PROGRAM
002 - ANDREWS	\$49,961.60	\$473.34	\$960.00	\$5.00

SALES TAX FEE [Top of the Page](#)

Issuance Date: January 2015		
County	Transaction ID	Amount (\$)
	00200042030110514	\$1,945.06

Summary of criteria used (some reports will display summary totals)

Summary report information

00220042032132320	0.00
00220042032133031	0.00
00220042032133333	0.00
00220042032133605	0.00
00220042032142050	\$130.00
00220042032155839	\$10.00
<b>Total</b>	<b>\$49,961.60</b>
<b>Items Sold</b>	<b>65</b>
<b>Voided</b>	<b>3</b>

[Top of the Page](#)

Run Date: 06/11/2015  
 Run Time: 8:31:03 AM

Page 2 of 5

RTS Date: 06/10/2015

Detailed report information

Date & time report was generated



# Email a Report



**Set the email options - Fee Collection and Distribution Report** Help

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:**


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

Include a link to the report  
 Attach the report




# Saving a Report View



**Save as report view** Help 

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

**Name:**  
 

**Location:**  
None  
[Select another location...](#) [Select My Folders](#)

Save to "My Folders" tab





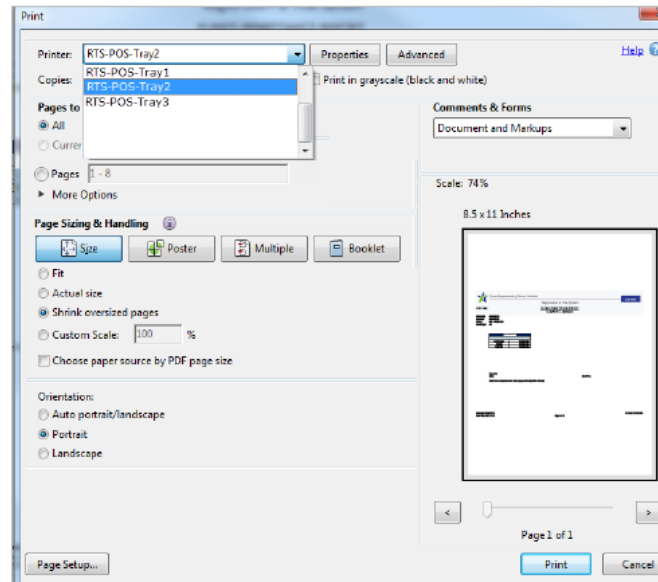
# Printing a Cognos Report



## 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 the:
  - **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.



# Recap - Running Report






## 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

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- 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

**RTS Refactoring Project  
Working with Cognos Reports**

Texas Department  
of Motor Vehicles

TxDMV RTS Training Guide for Working with Cognos Reports

April, 2015

Texas Department  
of Motor Vehicles

**TxDMV RTS Guide for Running  
Daily, Weekly, and Monthly  
RTS Activity Reports**

May 15, 2015

Texas Department  
of Motor Vehicles

**Frequently Asked Questions  
Cognos Reporting**

Question	Response
I clicked on the Cognos icon and attempted to log in to Cognos. I receive an error message. Why?	All workstations will have a Cognos icon and any user can attempt to log on to Cognos. However, not everyone will be able to access the tool. Only those who have the correct permissions can log in and access the tool. Users who do not have permission will see an error message. Please contact your County Administration to verify your permissions.
How many county reports will be developed for Cognos?	In the first release, more than 10 former mainframe (or Agency) reports that were previously downloaded to your printer have been converted to Cognos. Separate summary and detail reports 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.
Are the reports that we print in Cognos going to have the same name as they do today?	Many of the reports have similar names (like Funds Remittance) but others have been consolidated and renamed. For example, the former Funds Summary and Funds Transactions reports have been combined into a new report in Cognos called the Fee Type Funds Report. Refer to the Job Aid quick references posted on the TAC Hub for a complete list of converted and available reports.
What reporting features will county users have?	County users will have on-demand access to Cognos reports and have the ability to save, print, and as well as report the default PDF output into Excel spreadsheets and other formats. The county is customizing their reports by applying dates and filters to the reports as well as select specific funds and agencies.
What security measures are in place for county reports?	Like today, county users can see only the data for their own county. The Cognos reports are made available to the County Managers group within the TxDMV Directory.

**Daily Reconciliation Reports**  
For County Offices

Report Title	POS Path
BIAR - Batch Inventory Action Report (5901)	Reports > Reprint Reports
Countywide Fees Report (5902)	Reports > Reprint Reports
Countywide Inventory Report (5903)	Reports > Reprint Reports
Countywide Payment Type Report (5901)	Reports > Reprint Reports
Title Package Report (5911)	Reports > Reprint Reports

Report Content	Cognos Path: Public Folders
Funds Remittance (4604, 4605)	Finance > Funds Remittance Report
Funds Summary (4601)	
Funds Transactions (4602)	
Voiced Transactions (4603)	
Special Plates Count (4604)	

**Where are my reports that used to print automatically?**  
For County Offices

To locate information from the former:	In Cognos, go to:
Apprehension Report (4672)	Finance > Funds Remittance Report
Funds Remittance Report (4604, 4605)	Finance > Funds Remittance Report
Funds Summary (4601)	Finance > Fee Type Funds Report
Funds Transactions (4602)	Inventory > Inventory Transactions Report
Inventory Transactions (4672)	Finance > Monthly Funds Report
Monthly Funds Report	Sales Tax Penalty (4602)
Sales Tax Penalty (4602)	Young Farmer (4603)
Young Farmer (4603)	Registration Emissions Fee (4602)
Registration Emissions Fee (4602)	Finance > Week/Month-to-Date Fees Report
Month-To-Date Fees Report (4582, 4583, 4584)	

**Cognos Report Title and Data Content**  
For County Offices

Report Title	Content
\$5 Buyer Tag Fee Report (Collection of \$5 Dealer Fee (3461, 3463))	Monthly Funds Report
CRBE Report	Monthly Funds/Reg Emissions Fee (4602)
By County (5192)	Monthly Funds/Sales Tax Penalty (4602)
Report	Monthly Funds/Young Farmer (4602)
Distribution Report	Registration and Title Emissions (4683)
Inventory [Grand totals] (9362)	Reg and Title Emissions Summary (4682)
[54 Counties] (9353)	Sales Tax (4602)
	Sales Tax Emission Fee 1% (4602)
	TERP Fee (4602)
	Texas Mobility Fund Fee (4602)
	Sales Tax Funds Report
	Selected Sales Tax Funds (381A3)
	Special Plates County Invoice Report (Available in June)
	Special Plates County Invoice (3564)
	Week/Month-to-Date Fees Report
	Month-To-Date Fees (4582, 4583)
	Week-To-Date Cash Drawer (4552)
	Week-To-Date Fees (4582, 4583, 456C4)
	Voiced Transactions Report
	Voiced Transactions (5152)
	Workstation Transaction Count Report
	Workstation Transaction Counts (5922)

**Running a Cognos Report**

To run a report with its default options and display the finished report onscreen:

- Log in to Cognos.
- In the **Public Folders** tab area of the Cognos Connection home page, click the appropriate folder.
- In the report list, locate the report and click its name.
- On the report prompt page, select the appropriate information and click the **Finish** button.
- 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:


- Log in to Cognos.
- In the **Public Folders** tab area of the Cognos Connection home page, click the appropriate folder.
- In the report list, locate the report and click its name.
- On the report prompt page, select the appropriate information and click the **Finish** button.
- As the report runs, click the **Select a delivery method** link on the prompt displayed.
- From the options displayed, click the **Email Report** option.
- 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.



# Reference Material Example 1




 <b>Where are my reports that used to print automatically?</b> For County Offices	
<i>To locate information from the former:</i>	<i>In Cognos, go to:</i>
Apprehension Report (4672)	Finance > Funds Remittance Report <sup>1</sup>
Funds Remittance Report (4604, 4605)	Finance > Funds Remittance Report
Funds Summary <sup>2</sup> (4603) Funds Transactions <sup>2</sup> (4602)	Finance > Fee Type Funds Report
Inventory Transactions (4702)	Inventory > Inventory Transactions Report
Monthly Funds Report Sales Tax Penalty (4802) Young Farmer (4802) Registration Emissions Fee (4802)	Finance > Monthly Funds Report
Month-To-Date Fees Report (458b2/458b3)	Finance > Week/Month-to-Date Fees Report
NMVTIS Inquiry Report (366a4)	Title > NMVTIS Inquiry Error Report
Production Report (9482)	Performance Support > Employee Transaction
Sales Tax Emission Fee 1% (4802)	Finance > Monthly Funds Report
Sales Tax Report (4802)	Finance > Monthly Funds Report
TERP Fee (4802)	Finance > Monthly Funds Report
Texas Mobility Fund Fee (4802)	Finance > Monthly Funds Report
Voided Transaction Report (5152)	Administrative > Voided Transactions Report
Week-To-Date Cash Drawer (4552)	Finance > Week/Month-to-Date Fees Report
Week-To-Date Fees Report (456b2/B3/C4)	Finance > Week/Month-to-Date Fees Report
Year-To-Date Reg & Title Summary (9352)	Finance > Fee Collection and Distribution Report
Special Plates County Invoice (3564)	This report will continue to be downloaded to your printer as it is today until available in a future Cognos release.
County IRP Transmittal invoice (7472)	This report will continue to be downloaded to your printer as it is today until available in a future Cognos release.
<i>To print the:</i>	<i>In the POS, go to:</i>
Batch Inventory Action – BIAR (9901)	Reports > Reprint Reports
Completed Set Aside Transactions (9021)	Reports > Reprint Reports
County Wide Payment, Fees, Inventory, Exception (5902/5903/5904)	Reports > Reprint Reports
Substation Summary Payment, Fees, Inventory (5921/5922/5923)	Reports > Reprint Reports
Title Package Report (5911)	Reports > Reprint Reports




# Reference Material Example 2






## Frequently Asked Questions About RTS Point of Sale (POS)

Question	Response
How do I log on to POS?	1. At the <b>Welcome to Windows</b> page, press the <b>Ctrl + Alt + Delete</b> keys at the same time on your keyboard.



## Frequently Asked Questions About Cognos Reporting

Question	Response
I clicked on the Cognos icon and attempted to log in to Cognos. I receive an error message. Why?	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.
How do I know what to log in to?	
What happens if I am on a wrong workstation?	
How many county reports will be developed for Cognos?	In the first release, more than 19 former mainframe (or, <i>legacy</i> ) 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.



# Reference Material Example 3



## TxDMV RTS Guide for Running Daily, Weekly, and Monthly RTS Activity Reports

May 15, 2015



Texas Department  
of Motor Vehicles



# Reference materials for Cognos training is on the TxDMV TAC Hub

Texas Department of Motor Vehicles  
HELPING TEXANS GO, HELPING TEXAS GROW

Tax Assessor-Collectors

TxDMV » RTS Refactoring Resources

**RTS Refactoring Resources**

Find Your RSC

Find your Regional Service Center

Manuals & Guides

Select from list

**TAC Toolbox**

- Forms
- Photo ID Requirements
- Publications
- Single Sticker Resources
- RTS Refactoring Resources**
- NMVTIS Resources
- Statutes & Rules
- Continuing Education Credit
- TxDMV Learning Center Info
- Go to TxDMV Learning Center

**Training** Job Aids ListSers

**FAQs**

- Cognos Reports
- RTS Point of Sale

**Guides**

- Training Guide for Working with Cognos Reports
- Training Guide for Running Daily, Weekly, and Monthly RTS Activity Reports

**Presentations**

- Working with Cognos Reports
- RTS Refactoring Point of Sale

**Webinars**

- RTS Refactoring Project and Cognos
- Cognos Report Training
- RTS Refactoring Point of Sale

**RTS Refactoring Resources**

Training Job Aids ListSers

**FAQs**

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- RTS Point of Sale

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- RTS Refactoring Point of Sale

**Webinars**

- RTS Refactoring Project and Cognos
- Cognos Report Training
- RTS Refactoring Point of Sale

Emails

Job Aids

Webinars, Guides & FAQs

Check your knowledge

# Knowledge Check

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## 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.*

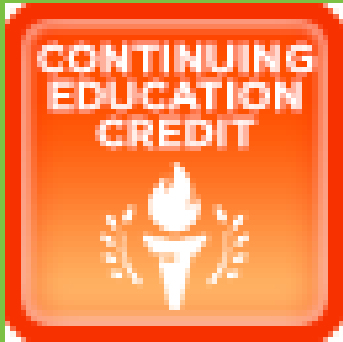
*True*





# Questions and Summary

# The RTS Refactoring Webinar - Reports



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.