

Move Custom Reports from Cognos 10 and Move Reports to Cognos 11

Costpoint Enterprise Reporting Administrator Series

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Introduction

This document is for Costpoint CER Cloud Administrators and describes how to move **custom reports** from Cognos 10 into Cognos 11.

NOTE: After you copy the custom report in Cognos 10 you must wait for Deltek to re-provision your system before you create the custom report in Cognos 11.

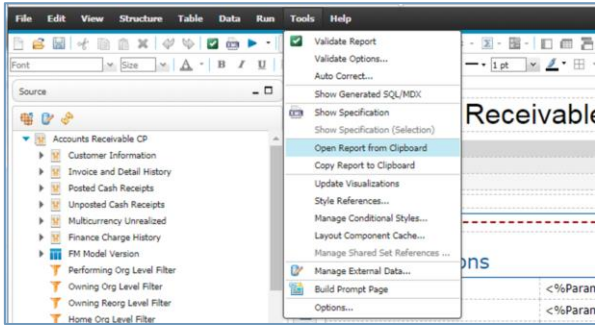

Overview:

When you create the document you will perform the following:

- Copy the report data to a Notepad
- Open the Cognos 11 environment
- Import the xml data from the Notepad to Cognos 11

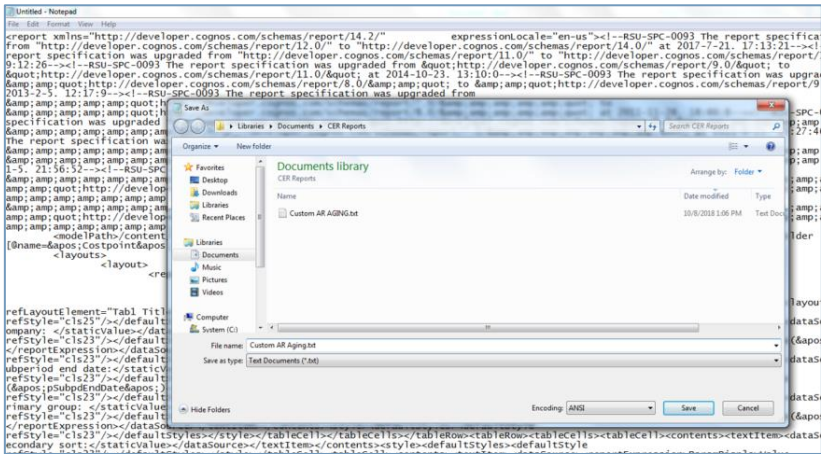
Procedure: Copy and Save the Report XML

Follow the steps in the table below to copy a report to a clipboard from the Cognos 10.x environment.

Step	Action
1	In Report Studio (Cognos 10.x), open the report to be imported.
2	<p>From the Tools menu select: Copy Report to Clipboard</p>  <p>Result: A new window opens with the report xml.</p> 

Move Custom Reports from Cognos 10 and Move Reports to Cognos 11

Step	Action
3	Select All the data (CTRL+A)
4	Copy the data (CTRL + C)
5	Open a Notepad or another text editor of your choice.
6	Paste the data contents (CTRL + V)
7	Save the text file using the name of the report as the document name.



NOTE: It is important to remember where you save this Notepad text file so you can locate it later.

STOP!

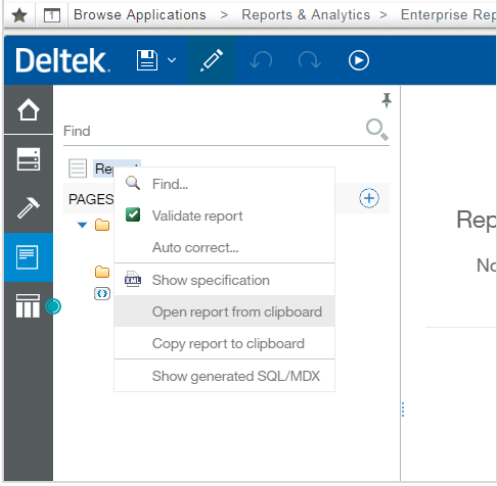
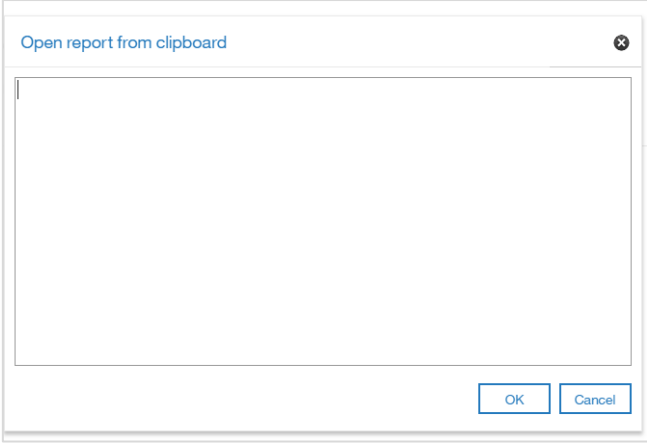
After you copy the custom report in Cognos 10 you must wait for Deltek to re-provision your system before you create the custom report in Cognos 11. You will receive notification when this is complete to proceed to the next step; create the custom report in Cognos 11.

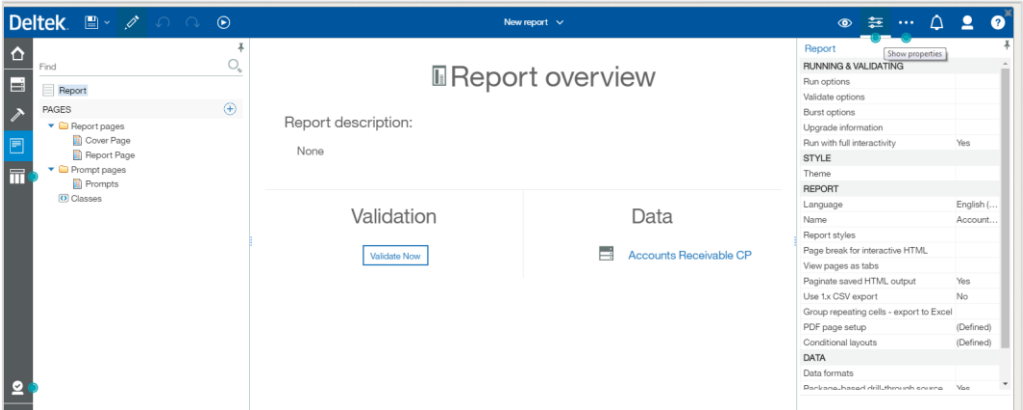
Procedure: Import the Report XML

Once you have received the notice that the CER system has been re-provisioned, follow the steps in the table below to create the report in Cognos 11.

Step	Action
1	Open a report from clipboard in new environment (Cognos 11).
2	Create a New Report (icon found at bottom of navigation bar).
3	Choose a blank template.
4	On the navigation bar, select the icon: Pages

Move Custom Reports from Cognos 10 and Move Reports to Cognos 11

Step	Action
5	<p>Right-click on Report and select: Open report from clipboard</p>  <p>Result: A new window pops up where you can paste the contents of report spec.</p> 
6	Open the Notepad document where you saved to the xml data.
7	Select All the data (CTRL+A)
8	Copy the data (CTRL + C)
9	Paste in the new window (CTRL + V)
10	<p>Click: OK</p> <p>NOTE: You may be prompted to re-link your report package. If so, click on the Data icon in the navigation bar (just under the home icon). The package it is trying to find will have an '!' sign next to it as a warning.</p>

Step	Action
11	Click: OK
12	Right-click and select: Replace package
13	Navigate to the where the package currently resides under Team content. NOTE: Make sure you have rights to all the necessary folders first so that you can navigate to it.
14	Click: Open
15	<p>On the application bar, select the icon: Properties</p> <p>NOTE: You may have to select Report again to engage this object.</p> 
16	<p>In the area Report - RUNNING & VALIDATING, check the status for the setting Run with full interactivity.</p> <p>NOTES:</p> <ul style="list-style-type: none"> • Since this is created as a new report, interactivity defaults to: Yes • If this is a report that uses HTML items or Custom SQL it will not work with interactivity and you will get an error. If an error occurs the property will need to be changed to: No • Many standard Deltek reports use html to generate the tabbed prompting pages so if your report is a custom version of a Deltek report it's likely that the setting should be No.
17	After setting the interactivity, run your report to ensure there are no errors.
18	Save your report to the desired location under Company content .
19	If you have more reports to update in Cognos 11, Repeat the procedures in this document .