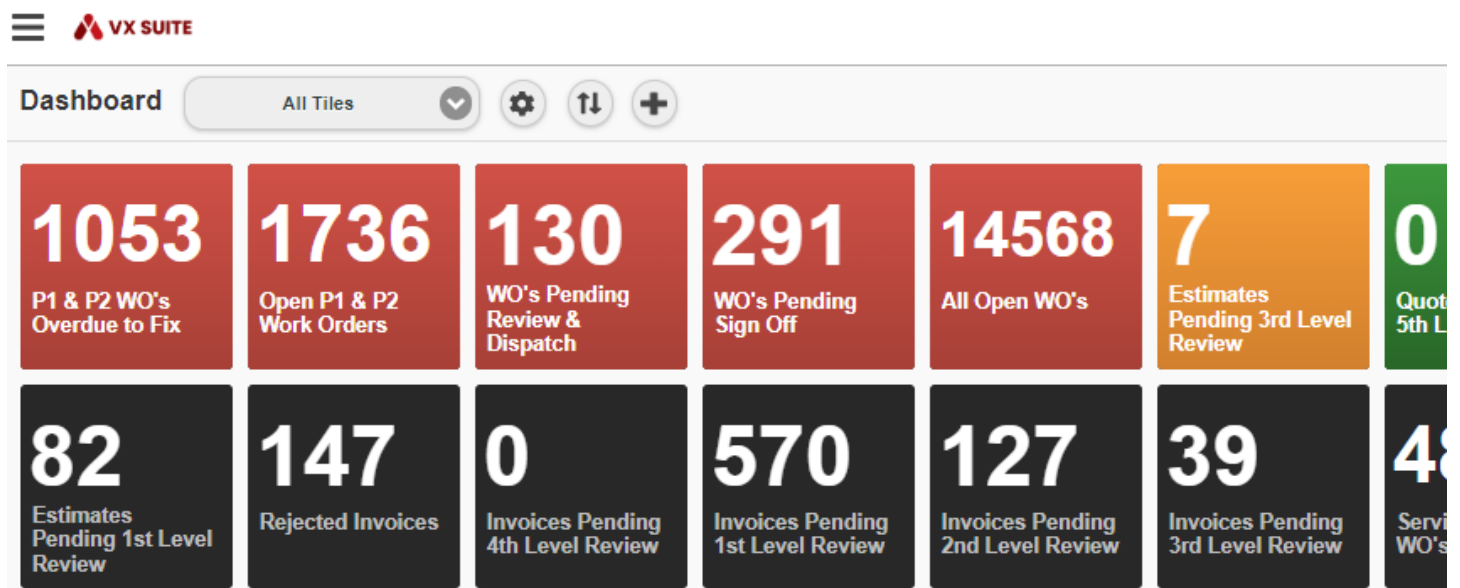


## Running Cognos Reports in vxMaintain (for KBP Ops Team):

How to run reports in vxMaintain Cognos Analytics:

1. Log into vxMaintain which will take you to either the “Dashboard” view or Workspace view.

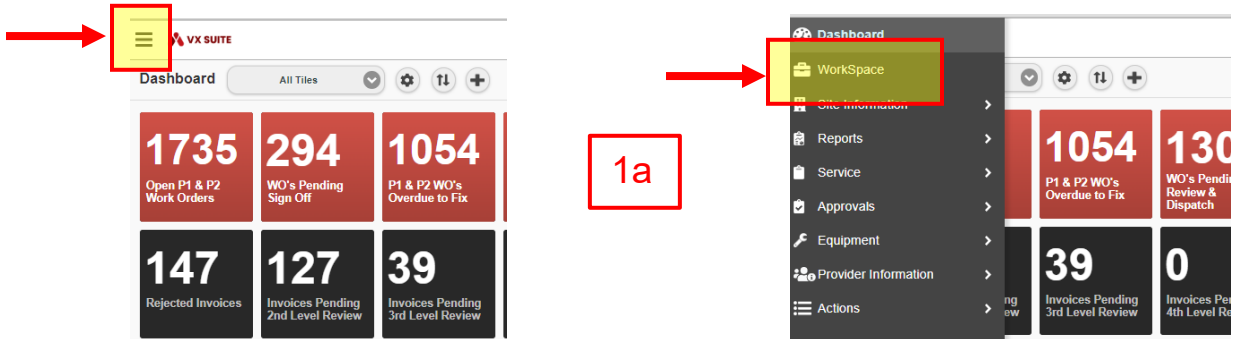
### Dashboard



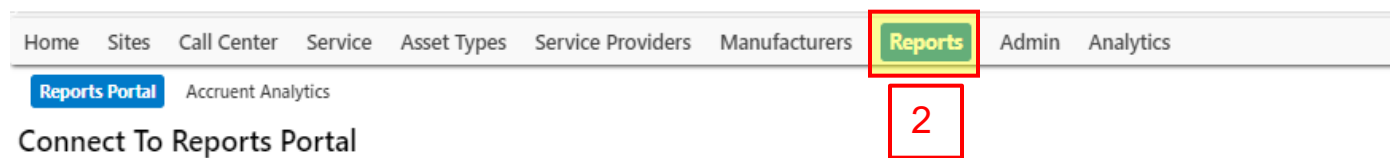
### Workspace

The workspace shows the navigation menu with 'Service' selected. The breadcrumb trail is: Home > Sites > Call Center > Service > Asset Types > Service Providers > Manufacturers > Reports > Admin > Analytics. The 'All Work Orders' link is highlighted in blue. Below the navigation, there is a search bar with the following criteria: Status, WO #, Site Name, Site Description, Priority, Service Provider, Date/Time Opened, and Date. A message below the search bar reads: 'Please select some criteria and hit Search'. At the bottom, it says 'Displaying 0 - 0 of 0'.

- a. If you are in Dashboard, you'll need to go to Workspace. To do so, click on the 3 lines in upper left corner and select "Workspace"



2. In "Workspace" view, click "Reports"

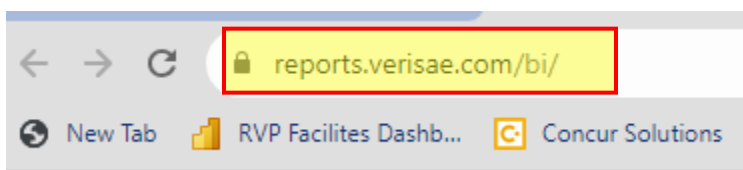


The Cognos Portal should start in another window or tab.

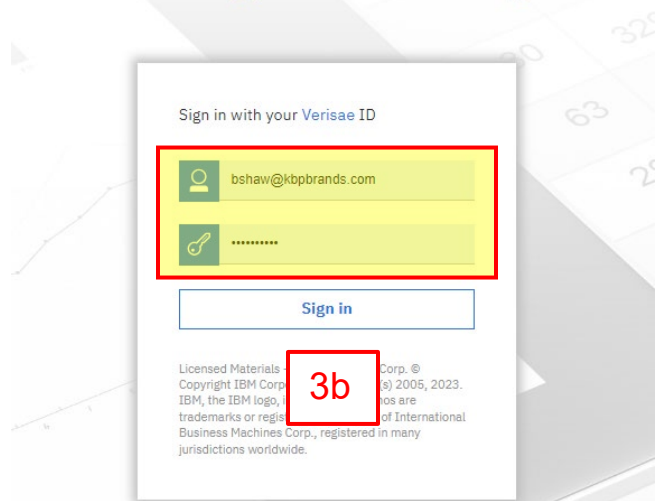
If you have closed the Cognos Portal window you may need to log out and log back in to restart the Cognos Portal.

If the Cognos Portal displays the message "The user is already authenticated", try clicking on the Cognos Portal tab once again.

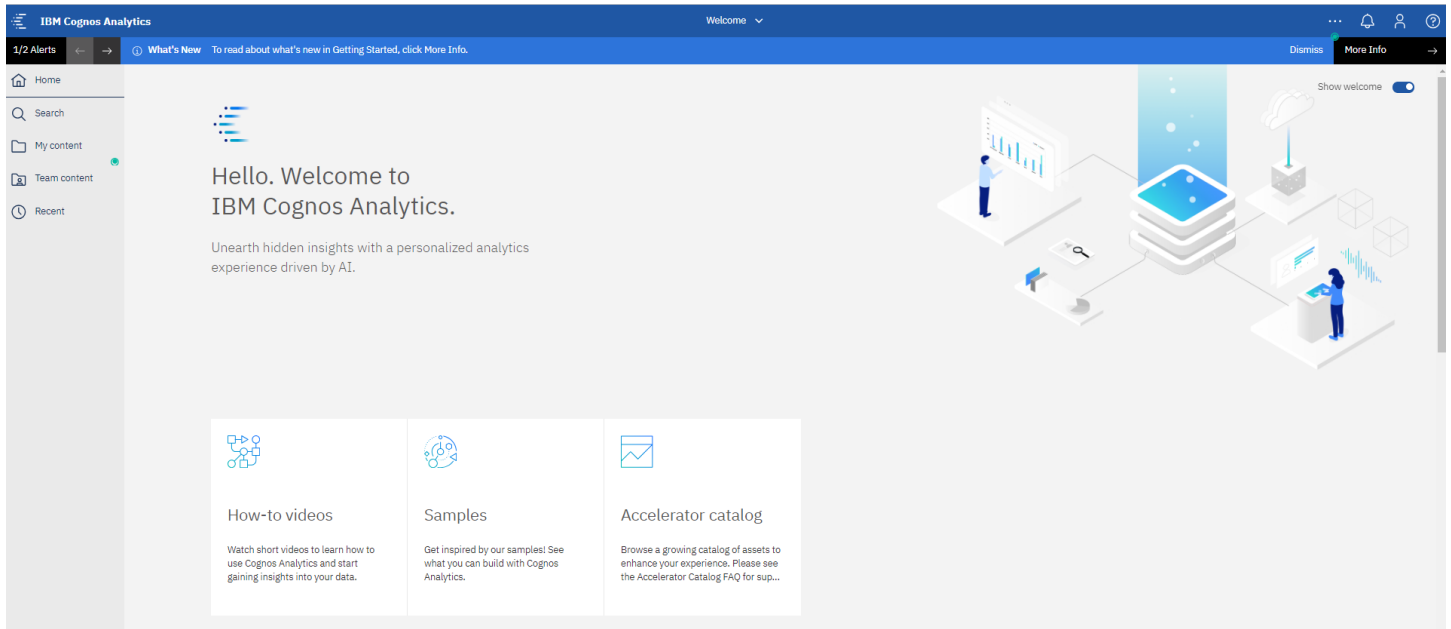
3. If the link does not take you directly into the reporting platform, go to the URL "report.verisae.com", hit enter and log in using your vxMaintain sign in information" and then hit "Sign In".



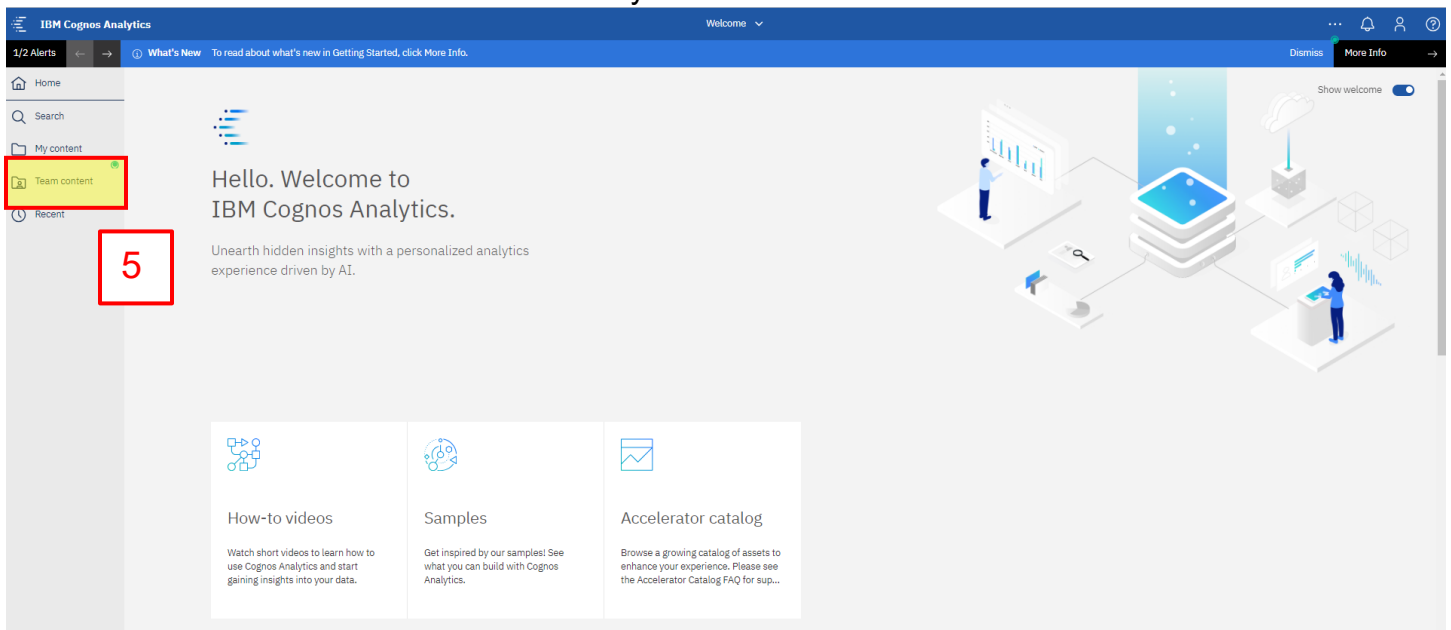
## IBM Cognos Analytics



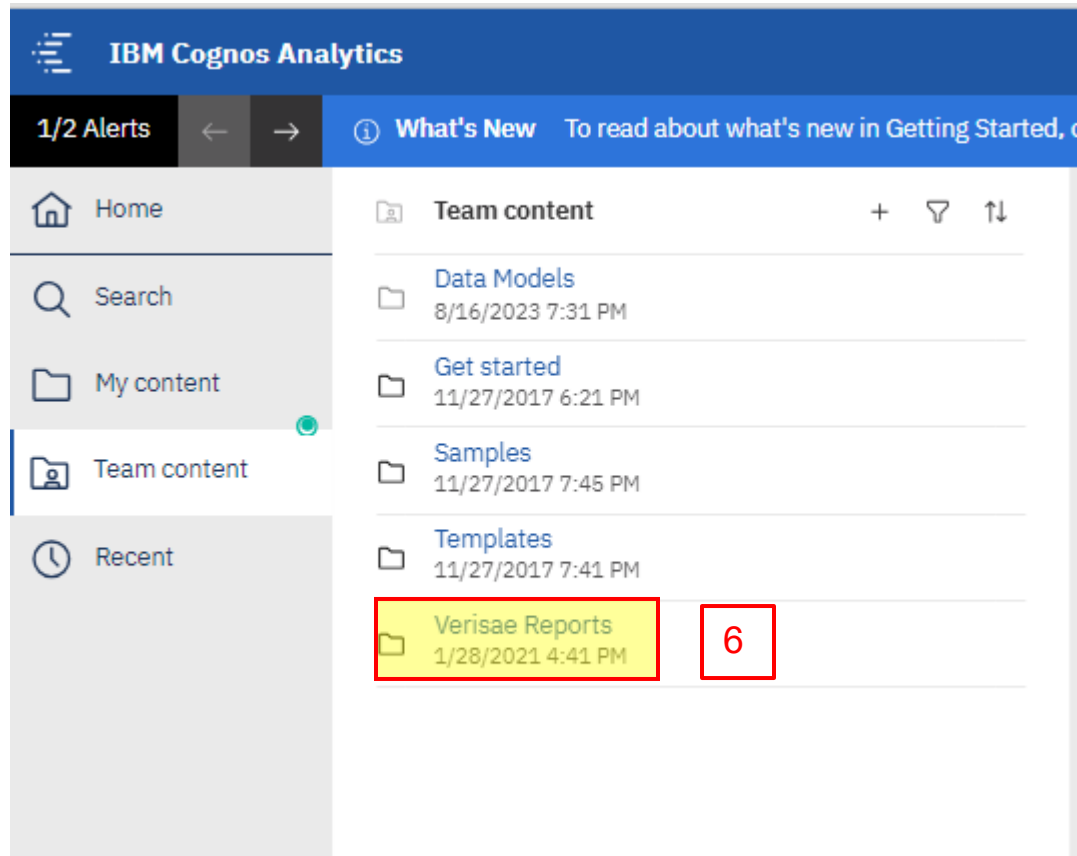
#### 4. Once logged in you will be directed to the below “Welcome Screen”



#### 5. Go to Team Content and 'eft click on your mouse.

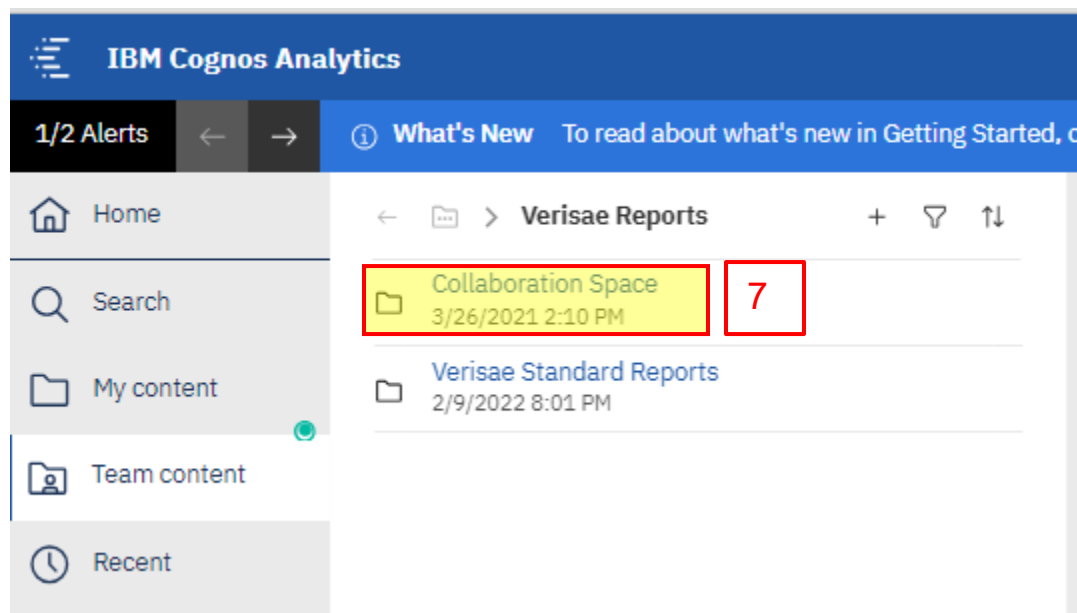


6. Go to “Verisae Reports” and left click on your mouse.



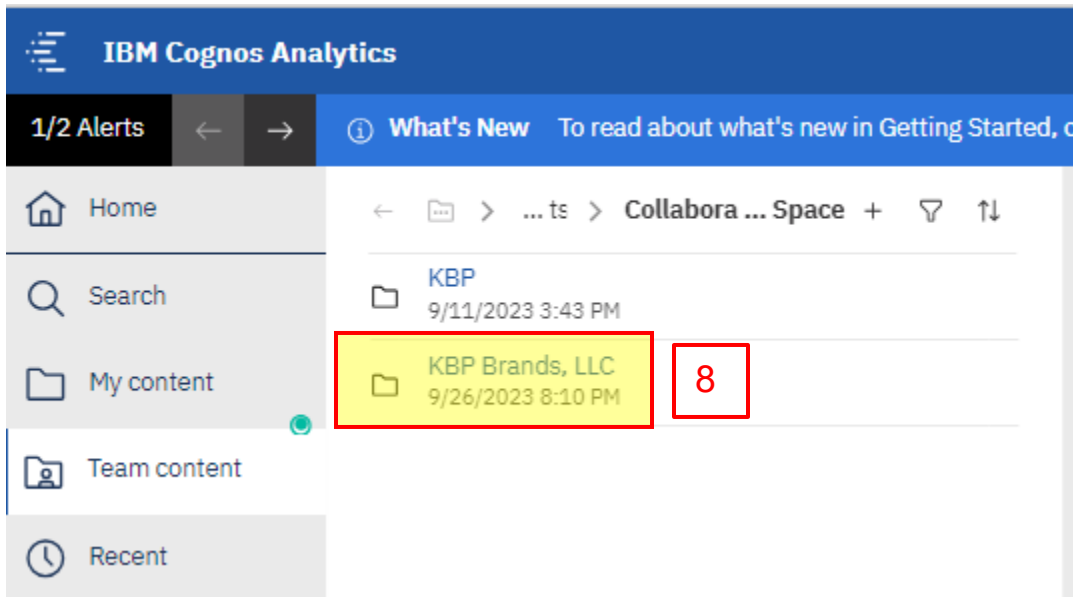
The screenshot shows the IBM Cognos Analytics interface. The top navigation bar includes a hamburger menu icon, the text "IBM Cognos Analytics", and a "1/2 Alerts" button. Below this is a "What's New" section with a sub-header "To read about what's new in Getting Started, c". The main content area is divided into a left sidebar and a right pane. The sidebar contains navigation options: Home, Search, My content, Team content (highlighted with a blue bar and a green dot), and Recent. The right pane displays the "Team content" folder, which contains several sub-folders: Data Models (8/16/2023 7:31 PM), Get started (11/27/2017 6:21 PM), Samples (11/27/2017 7:45 PM), Templates (11/27/2017 7:41 PM), and Verisae Reports (1/28/2021 4:41 PM). The "Verisae Reports" folder is highlighted with a yellow background, and a red box with the number "6" is placed to its right.

7. Go to “Collaboration Space” and left click on your mouse.

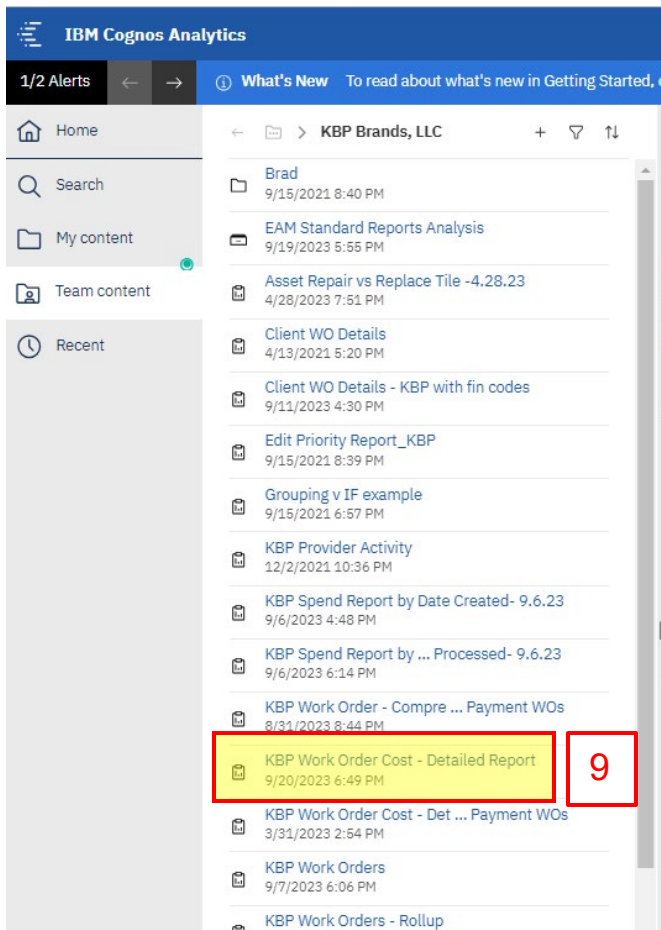


The screenshot shows the IBM Cognos Analytics interface. The top navigation bar includes a hamburger menu icon, the text "IBM Cognos Analytics", and a "1/2 Alerts" button. Below this is a "What's New" section with a sub-header "To read about what's new in Getting Started, c". The main content area is divided into a left sidebar and a right pane. The sidebar contains navigation options: Home, Search, My content, Team content (highlighted with a blue bar and a green dot), and Recent. The right pane displays the "Verisae Reports" folder, which contains two sub-folders: Collaboration Space (3/26/2021 2:10 PM) and Verisae Standard Reports (2/9/2022 8:01 PM). The "Collaboration Space" folder is highlighted with a yellow background, and a red box with the number "7" is placed to its right.

8. Go to “KBP Brands, LLC” and left click on your mouse.



9. Although there are many different reports you can use, for most purposes, go to “KBP Work Order Cost – Detailed Report” ” and left click on your mouse.



10. The below report prompt page will pull up.

1/1 Alerts | What's New | To read about what's new in Cognos Analytics, click More Info.

### Work Order Cost Detailed Report - Prompt Page

Select Client :	<input type="text" value="Client Name"/>	Select Site :	<input type="text"/>
Select Level 1 Org :	<input type="text" value="All"/>	Select Department :	<input type="text"/>
Select Finance Code :	<input type="text"/>	Select Asset Category :	<input type="text"/>
Select Manufacturer :	<input type="text"/>	Select Work Order Status :	<ul style="list-style-type: none"><li><input type="checkbox"/> 1st Level Estimate Review</li><li><input type="checkbox"/> 1st Level Invoice Approval</li><li><input type="checkbox"/> 2nd Level Invoice Approval</li><li><input type="checkbox"/> 2nd Level Quote Estimate Review</li><li><input type="checkbox"/> 3rd Level Invoice Approval</li><li><input type="checkbox"/> 3rd Level Quote Estimate Review</li><li><input type="checkbox"/> 4th Level Invoice Approval</li><li><input type="checkbox"/> 4th Level Quote Estimate Review</li><li><input type="checkbox"/> 5th Level Invoice Approval</li><li><input type="checkbox"/> 5th Level Quote Estimate Review</li></ul>
Select Asset SubCategory :	<input type="text"/>	Select Work Order Priority :	<input type="text"/>
Select Service Provider :	<input type="text"/>	Select Date Range :	From: <input type="text" value="Oct 30, 2023"/> To: <input type="text" value="Oct 30, 2023"/>
Select Time Range Criteria :	<input type="text" value="W/O Creation Date"/>		

Note : If Selecting Individual Sites, Please restrict the list of selection to less than 100.  
General Note : The Report runs for All Values of All of Non-Mandatory Prompts by Default. So Use these Non-Mandatory Prompts if You really want to restrict Your Query to something specific.

11. Select "KBP Brands, LLC" from "Select Client" drop down.

1/1 Alerts | What's New | To read about what's new in Cognos Analytics, click More Info.

### Work Order Cost Detailed Report - Prompt Page

Select Client :	<input type="text" value="Client Name"/>
Select Level 1 Org :	<input type="text"/>
Select Finance Code :	<input type="text"/>
Select Manufacturer :	<input type="text"/>
Select Asset SubCategory :	<input type="text"/>

11

- Client Name
- Client Name
- KBP Brands, LLC

12. Although this is not required, you can narrow the search by many different categories starting with “Level 1 Org.”

The screenshot displays the 'Work Order Cost Detailed Report - Prompt Page' in Cognos Analytics. The interface includes a top navigation bar with icons for home, search, and navigation. Below the navigation bar, there is a '1/1 Alerts' section and a 'What's New' notification. The main content area contains four filter sections:

- Select Client :** A dropdown menu showing 'KBP Brands, LLC'.
- Select Level 1 Org :** A dropdown menu with a red box around it and a red box containing the number '12'. A red arrow points to the dropdown list, which is expanded to show a list of Level 1 Organizations. The list includes 'All', 'Alabama', 'Arizona' (highlighted), 'Arkansas', 'Atlanta', 'Buffalo', 'Central Florida', 'Central Texas', 'Chicago', 'Colorado Springs', 'Dallas', 'Detroit', 'Home Office', 'Houston', 'Indianapolis', 'Kansas City', 'Maine', and 'Maryland'. There are also 'All' and 'Deselect all' options at the bottom of the list.
- Select Finance Code :** A dropdown menu.
- Select Manufacturer :** A list of checkboxes for manufacturers: 3 IOGIC, 3M, AAON, ABCO, ACE, and ACER.

13. Continue selecting items in different category boxes if you want to narrow your search to specific categories or items. If you don't select any particulars, it will grab everything in the date range that you specify.

The screenshot shows the 'KBP Work Order Cost - Detailed Report' interface. It features a grid of filter categories with dropdown menus and checkboxes. Red arrows indicate the following selections:

- Select Client:** KBP Brands, LLC
- Select Level 1 Org:** All
- Select Site:** 0000 - TEST SITE
- Select Finance Code:** In Scope
- Select Department:** Building
- Select Manufacturer:** 3 ITBE
- Select Asset Category:** Computer
- Select Asset SubCategory:** 2 Door Freezer old
- Select Work Order Status:** 1st Level Estimate Review

14. Select Time Range priority for work orders you want to look at. In most cases you will pick either "WO Creation Date" or "WO Invoice Processed Date" which just depends on the priority of the WO's you want to review.

The screenshot shows the 'Select Time Range Criteria' dropdown menu. The options are:

- WO Creation Date
- Time Range
- WO Approved Date
- WO Completion Date
- WO Creation Date
- WO Invoice Processed Date** (highlighted)
- WO Last Assigned Date

A red box highlights the dropdown menu, and a red square with the number '14' is positioned to the right of the menu.

Note : If Selecting Individual Sites, Please restrict the list of selection to less than 100.

15. Select date range you want to review.

Select Date Range :

From:

To:

15

16. Once all criteria has been selected, hit the “Finish” button in bottom left side of report prompt sheet.

Select Time Range Criteria :

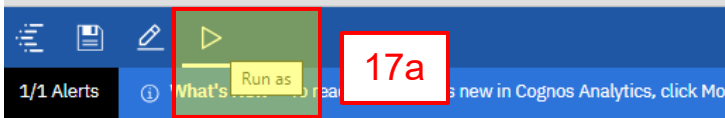
WO Creation Date

Note : If Selecting Individual Sites, Please restrict the list of selection to less than 100.

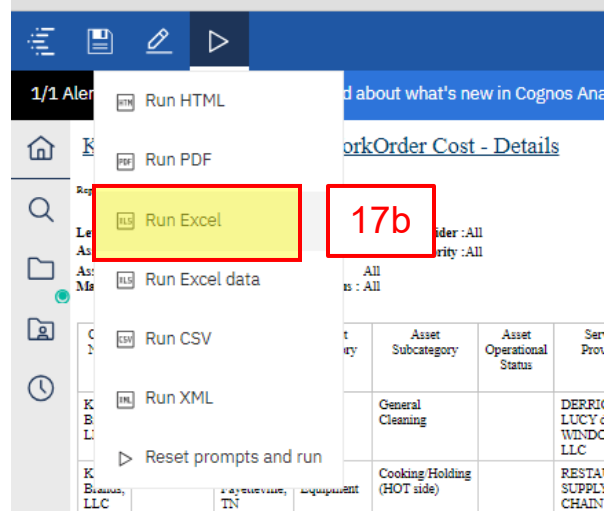
General Note : The Report runs for All Values of All of Non-Mandatory Prompts by Default. So Use these Non-Mandatory Prompts

Cancel Finish 16

17. Once report is finished, it’s easiest to download and review in an EXCEL document. To do so, left click on the triangle at top left side of page and select “Run Excel”.



17a



17b

**KBP Brands, LLC - KBP WorkOrder Cost - Details**

Report Run For: WO Creation Date: Between Jan 1, 2023 and Oct 30, 2023

Level 1 Org : All    Site : All    Provider : All  
 Asset Category : All    Account Code : All    Priority : All  
 Asset Sub Category : All    Department : All  
 Manufacturer : All    Work Order Status : All

Client Name	Level 1 Organization	Store	Asset Category	Asset Subcategory	Asset Operational Status	Service Provider	WO Previously Assigned To
KBP Brands, LLC	Alabama	FQ-05441 - Fayetteville, TN	Interior	General Cleaning		DERRICK LUCY dba WINDOWS II, LLC	
KBP Brands, LLC	Alabama	FQ-05441	Kitchen	Cooking/Holding		RESTAURANT	

18. The report may take a minute to run, but it will eventually create an EXCEL document for you to open, save, make changes and review as needed.

