Getting Started with Cognos 11
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1. Quick Guide to running reports in Cognos 11

**Step 1:**
Navigate to [http://www.sussex.ac.uk/its/services/staffservices/businessapplications](http://www.sussex.ac.uk/its/services/staffservices/businessapplications) and click on the ‘Cognos 11’ link on the Business Applications logon page. **IMPORTANT: You must be on the staff VPN to access Cognos 11**

![Cognos 11 Login](image)

**Step 2:**
Enter your Sussex login and password

![IBM Cognos Analytics](image)
Step 3:
Select a Cognos portal tab from 'My Portal Pages'. E.g. For general course and module reports click on the 'General Resources' option

![Image of portal page]

Step 4:
Click on your chosen report from the report listing and enter any prompt selections as requested.

![Image of report listing]
Step 5:
Print or save the report using the standard PDF tools (PDF is the default report format for this report) or Save the report to excel by clicking on the down arrow next to the PDF icon then click on ‘View in Excel Options’ to select a suitable Excel option.

Step 6:
The download dialog box (for your chosen browser) will then prompt you to open or save the report in the chosen format

Edge/Chrome

Firefox

IE11
Step 7:
To log out of Cognos click the person icon in the top right-hand corner of the page and then select 'Sign out'
2. Searching for Reports

The **Search** feature in Cognos 11 is much improved from its Cognos 10 predecessor, searches are tailored to your access level and suggest content/phrases as you type.

**Step 1:**
The **Search** button opens the **Search** field window. As you begin typing any objects that meet the criteria will begin to populate the window.
**Step 2:**

You can select an object from the pull-down menu or hit the **Enter** key to return all related objects. The icons next to the object indicate what the item type it is and can be revealed by hovering over the icon.

![Search results](image)

**Step 3:**

To run an item, click the **Title** of the search result or click the three dots for **More** options,

![Current Group Membership](image)
Step 4:
Hover over the breadcrumb under the **Title** to reveal the items location or click on the breadcrumb to bring up the metadata tree placed at its location.

Step 5:
The filter button allows you to refine your search. In this example **Reports** are only returned in the **Results** window.
Step 6:

The **Save** button allows you to **Save** searches that you may use often. When you **Save** a search the next time you return to the **Search** window your **Saved** searches appear under the **Search** field. These can be removed by clicking on the ‘x’ on the saved **Search**. (**Filters** are not saved as part of a **Saved Search**)

![Saved Searches Example](image-url)
3. Saving a Personal Copy of a Report

You can use your personal folder ‘My Content’ to save views of recently run reports. It may also be convenient to keep a shortcut for a frequently used report in your ‘My Content’ area for ease of access.

**Step 1:**

To create a Shortcut or View of a report, use the search facility to locate the report (see Searching for Reports above) or select from your recently run reports on the Home page.

**Step 2 (Create a Report Shortcut):**

Use the three dots icon on the recent items (Action menu) or the report entry in the metadata tree (More menu)
On the Action or More menu choose ‘Create shortcut’ and then select ‘My Content’ as the destination. This will simply create a shortcut to the report in your ‘My Content’ area and you can run the report directly from that shortcut. You can delete these shortcuts using the More (three dots) options in your ‘My Content’ area.

Step 4 (Create a Report View):

On the Action or More menu choose ‘Create report view’ and then select ‘My Content’ as the destination on the Save as menu and change the Report View name if required. A report view is created in your ‘My Content’ area and this can be customised for your convenence (outlined in the next section).
4. Customising a Report View (‘My Content’ area)

Creating your own Report view of an existing report allows you to customise the following options:

- Change the default action of the Report View (‘Run the report’ or ‘View the most recent version’)
- Report View output – set the report view output to Excel instead of default PDF
- Pre-set Prompts – define the prompt values to use when the Report View runs
- Save versions of the Report View – Each time you run the Report View this can be saved and will be date stamped

**Step 1 – Change the default action:**

Select the More menu from your saved Report View in you ‘My Content’ area and then the Properties option

Expand the Advanced option on the Report tab and change the Default Portal Action from 'View the most recent report' to 'Run the report'
Step 2 – Change the Report View output:

Expand the **Report options** option on the **Report** tab and change the **Format** from ‘PDF’ to ‘Excel’ (or any other choice)

![Report options](image)

Step 3 – Pre-Set Prompts for the Report View:

Select **Set values** from the **Report** tab and untick **Prompt for values** if you no longer want the **Report View** to prompt automatically when running it. Select **Set** on the next screen, you can also **Clear** any pre-set prompts on this screen once they are set

![Report tab](image)

Next select the **Prompts** you wish to pre-set as you would running the report for real, clicking **Finish** to store them.

![Prompts for All Course Index Report](image)
These **Prompt** choices are now stored in the **Report View** and will run automatically on each **Report View** run.

<table>
<thead>
<tr>
<th>Classification</th>
<th>UG</th>
</tr>
</thead>
<tbody>
<tr>
<td>AcademicYear</td>
<td>2021</td>
</tr>
<tr>
<td>DeptCode</td>
<td>GEOGRAPHY - Geography (Level 5)</td>
</tr>
<tr>
<td>SchoolCode</td>
<td>GLOBAL SCHOOL</td>
</tr>
</tbody>
</table>

**Step 4 – Save versions of the Report View**

Run the **Report View** and the **Save the Report View** by clicking on the **Save** icon in the top left of the window and then click ‘Save report…’

To **View versions** of the **Report View**, go to the **More** menu of the **Report View** and choose **View Versions**.
Click the Timestamp to open the options of the Report Version where you can then either Delete the Report Version or open it by clicking on the PDF icon. The blue Information button reveals the metadata for that Report Version.

The number of Report Versions available is controlled in the Report View properties, under the Report tab > Advanced > Report output versions.
5. Help and Learn Resource

Cognos 11 has had its entire help system replaced with a brand new ‘Learn’ pane which now intelligently gives you information relevant to the part of the product that you are currently using.

Step 1:
Click on the ‘?’ icon in the top right corner of the window and the Learn centre opens with content relevant to you

![Learn pane](image)

Step 2:
Click in the Search box and enter a phrase to show relevant content related to your search. Use the filter to narrow down the Learn resource types

![Search bar](image)
Step 3:
Click on **Knowledge Center** to access the official IBM Cognos Analytics Version 11.1 documentation.

![Knowledge Center screenshot](image1)

Step 4:
Click on **What's New** to find out what is contained in the current and past releases of Cognos Analytics 11.1.x.

![What's New screenshot](image2)
6. Set a Homepage

Step 1:
You can make other content types (like Reports, Portal Tabs) your Home Page. Click the More button on the application toolbar and select Set as home.

Step 2:
To reset your Home Page click on the person icon (personal Menu) on the top right of the window and then go to My Preferences and then click on Reset to default on the Home Page section.
7. Troubleshooting

A. Browser Compatibility

<table>
<thead>
<tr>
<th>Cognos Viewers:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Browser</strong></td>
<td><strong>Version</strong></td>
</tr>
<tr>
<td>Apple Safari</td>
<td>9, 10, 11, and future fix packs</td>
</tr>
<tr>
<td>Apple Safari on iOS</td>
<td>12.x and future fix packs</td>
</tr>
<tr>
<td>Google Chrome</td>
<td>(latest release) and future fix packs</td>
</tr>
<tr>
<td>Microsoft Edge</td>
<td>44 and future fix packs</td>
</tr>
<tr>
<td>Microsoft Edge Chromium</td>
<td>Any Version and future fix packs</td>
</tr>
<tr>
<td>Microsoft Internet Explorer</td>
<td>11 and future fix packs</td>
</tr>
<tr>
<td>Mozilla Firefox ESR</td>
<td>68, 78 and future fix packs</td>
</tr>
</tbody>
</table>

**Cognos Authors:** Same as Viewers but note the limitations

<table>
<thead>
<tr>
<th>Browser</th>
<th>Limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple Safari</td>
<td>No Analysis, Query or Event Studio</td>
</tr>
<tr>
<td>Apple Safari on iOS</td>
<td>No Authoring, Analysis, Query or Event Studio</td>
</tr>
<tr>
<td>Google Chrome</td>
<td>No Analysis, Query or Event Studio</td>
</tr>
<tr>
<td>Microsoft Edge</td>
<td>No Analysis, Query or Event Studio</td>
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<tr>
<td>Microsoft Edge Chromium</td>
<td>No Analysis, Query or Event Studio</td>
</tr>
<tr>
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<tr>
<td>Mozilla Firefox ESR</td>
<td></td>
</tr>
</tbody>
</table>

For the latest compatibility see: [Cognos Analytics 11.1.7.0 - Related software for a specific product (ibm.com)](https://www.ibm.com)

B. PDF Reports Do Not Display in Browser

To get full functionality from PDF versions of Cognos reports they need to open within the web browser and NOT in Adobe Reader/Acrobat. If your PDF report is opening a separate window in Adobe Reader/Acrobat the settings in Adobe need to be changed to allow PDFs to be viewed inside the web browser. To change these settings:

For Adobe Reader x or below:

- Open Adobe Reader/Acrobat
- Go to **Edit**, then **Preferences** and click on **Internet**
- In the right-hand panel, click the box to **Display PDF in browser**

For Adobe Reader XI or above:

- Open Adobe Reader/Acrobat
- Go to **Edit**, then **Preferences** and click on **Internet** in the categories
- Click on **Internet Setting** button
- In the dialog box go to **Programs** and click on **Manage add-ons**
• Under Add-on Types, select **Toolbars and Extensions**.
• In the list select Adobe PDF Reader and set to **Enable**

Close Adobe Reader/Acrobat and try opening the report again - it should now open inside the browser and you should be able to click on the links.

### 8. Issues and Errors

If any issues or errors occur whilst using Cognos 11 please raise a support ticket with IT and ensure you have included:

- details of the error including screenshots where appropriate,
- details of the report you were running and where you were running it from (location in Cognos metadata tree/portal tab name)
- any other relevant details (browser used, home or work pc etc)

[Log a support ticket online](#)