UNIVERSITY
OF SUSSEX

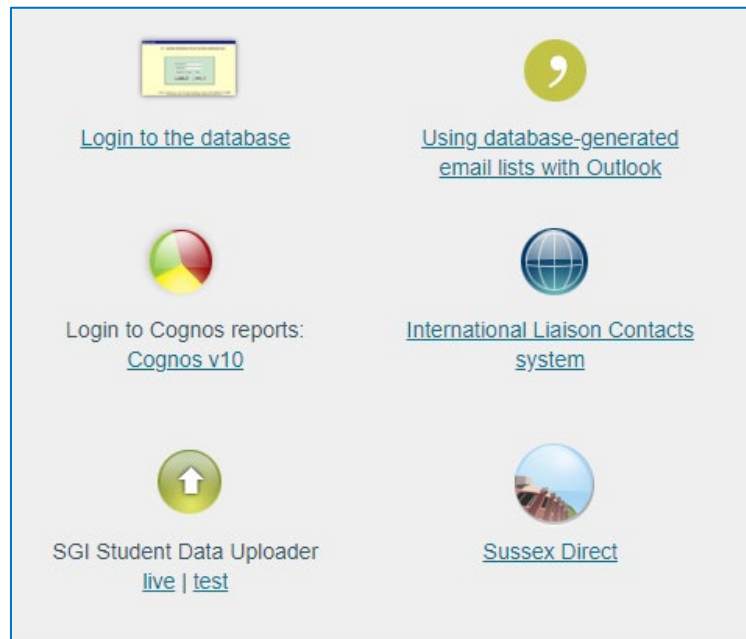# Getting Started with Cognos 11

IBM
Cognos
Analytics

ITS 26/02/2021

Contents

1. Quick Guide to running reports in Cognos 11

Step 1:

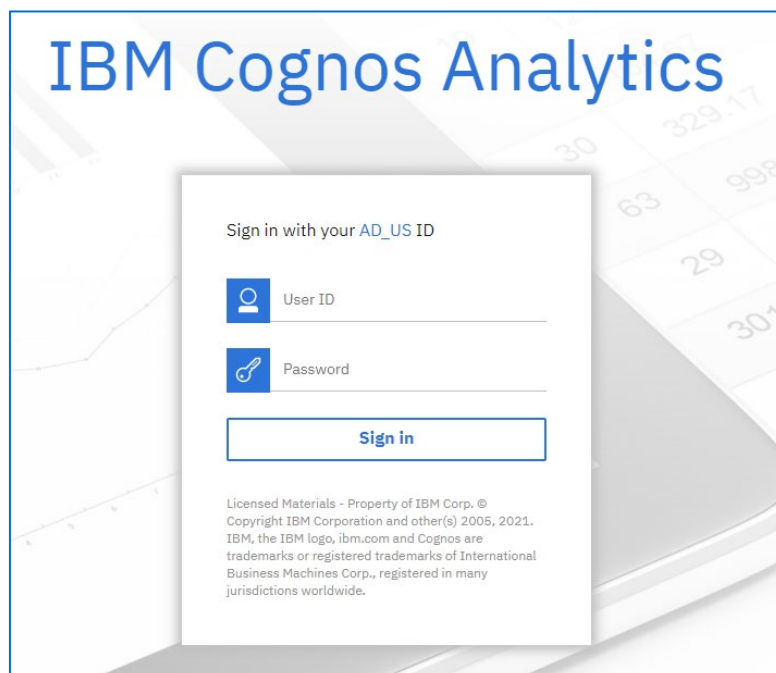Navigate to http://www.sussex.ac.uk/its/services/staffservices/businessapplications and click on the 'Cognos 11' link on the Business Applications logon page. **IMPORTANT: You must be on the staff VPN to access Cognos 11**
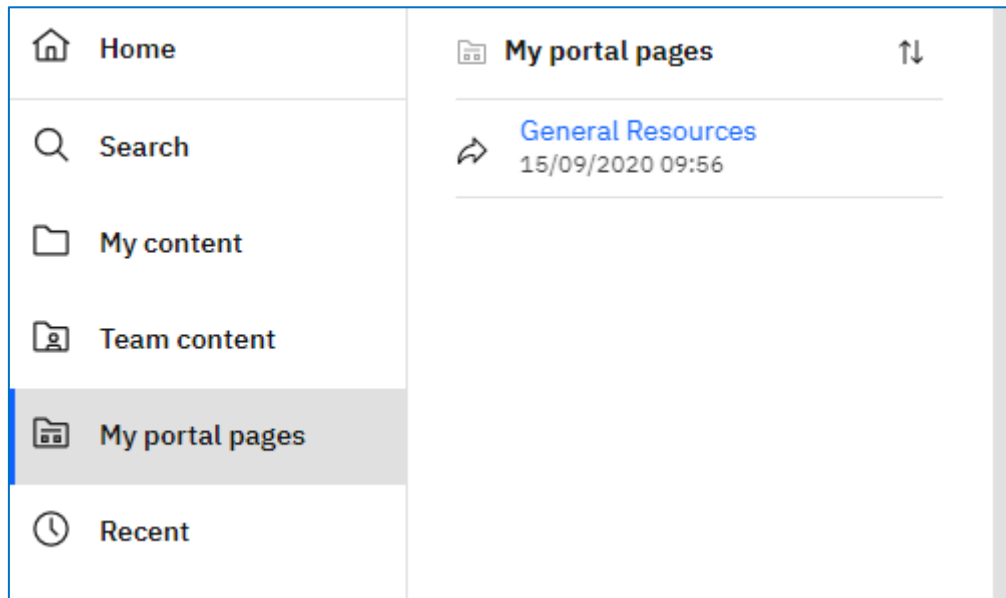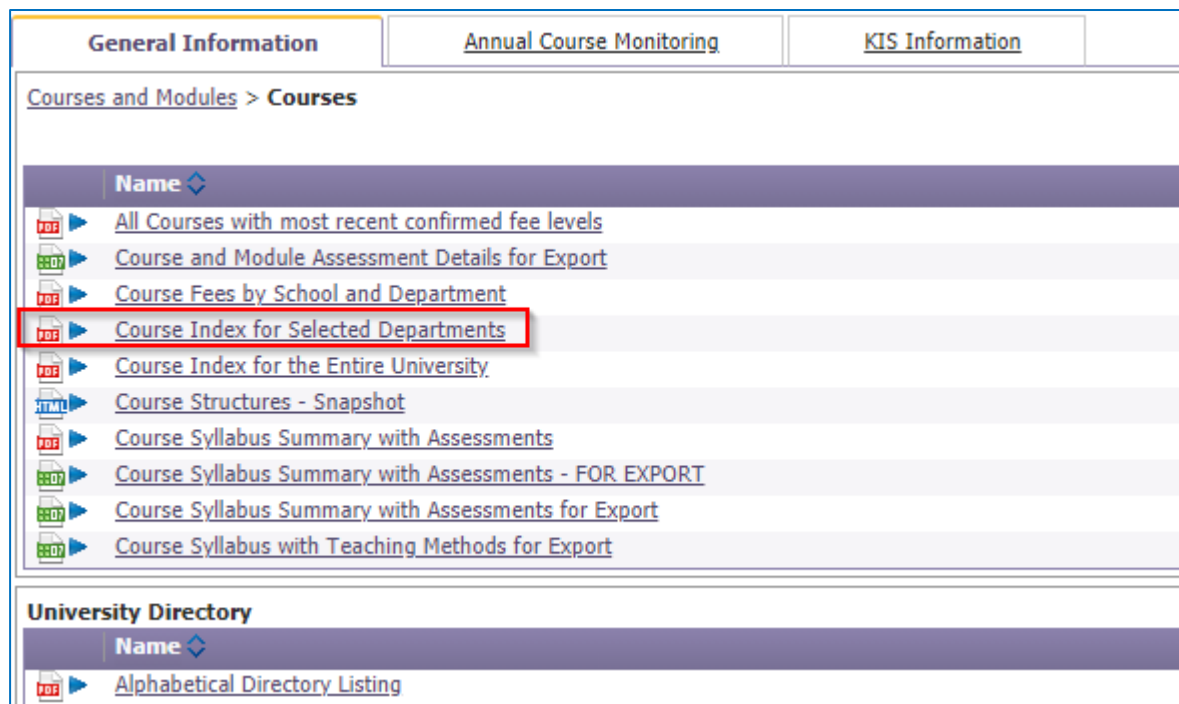

Step 2:

Enter you Sussex login and password

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

Step 4:

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

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'
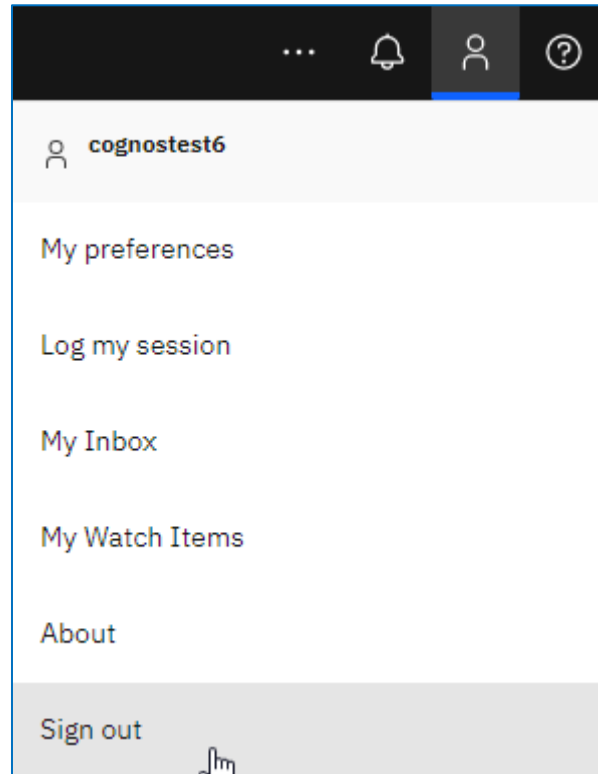
2. Searching for Reports

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.
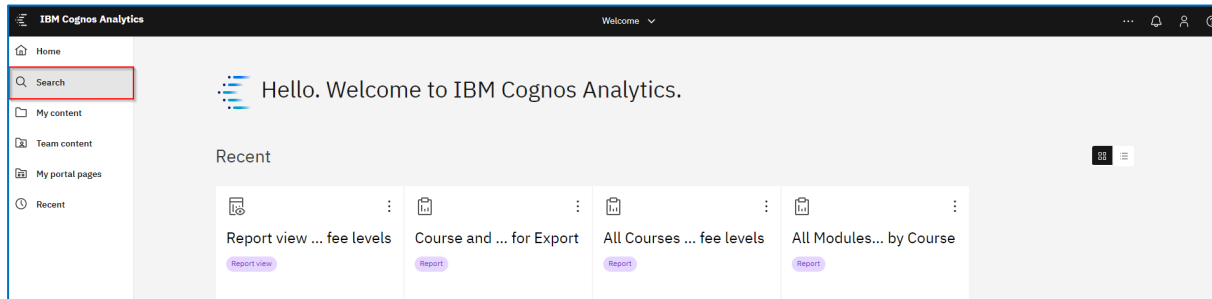
Step 1:

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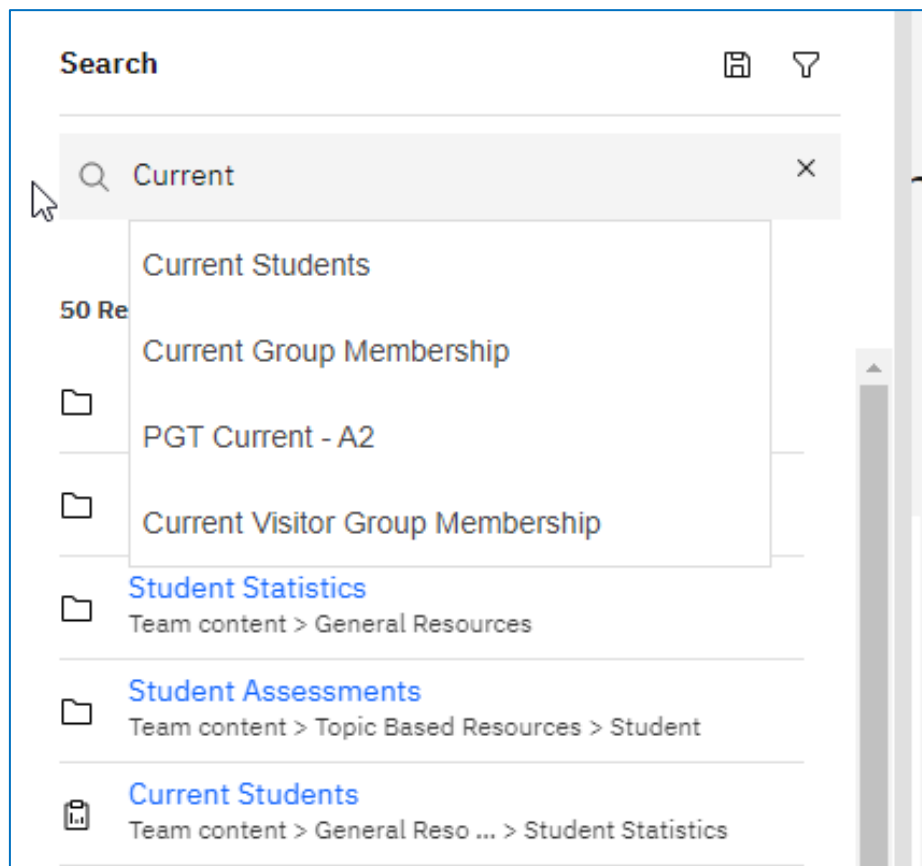
Step 2:

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.
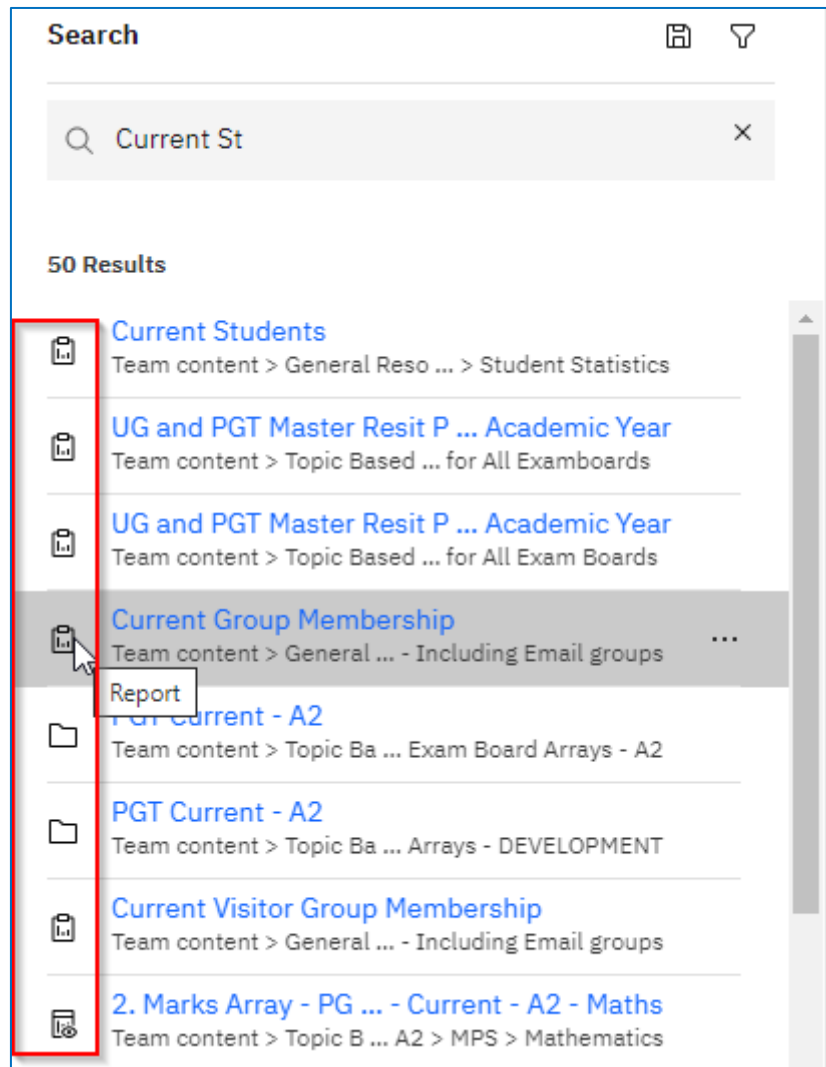
Step 3:

To run an item, click the **Title** of the search result or click the three dots for **More** options,
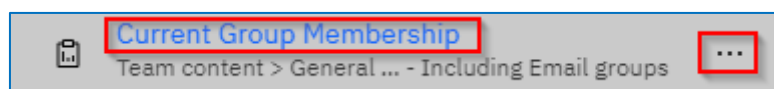
Step 4:

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.
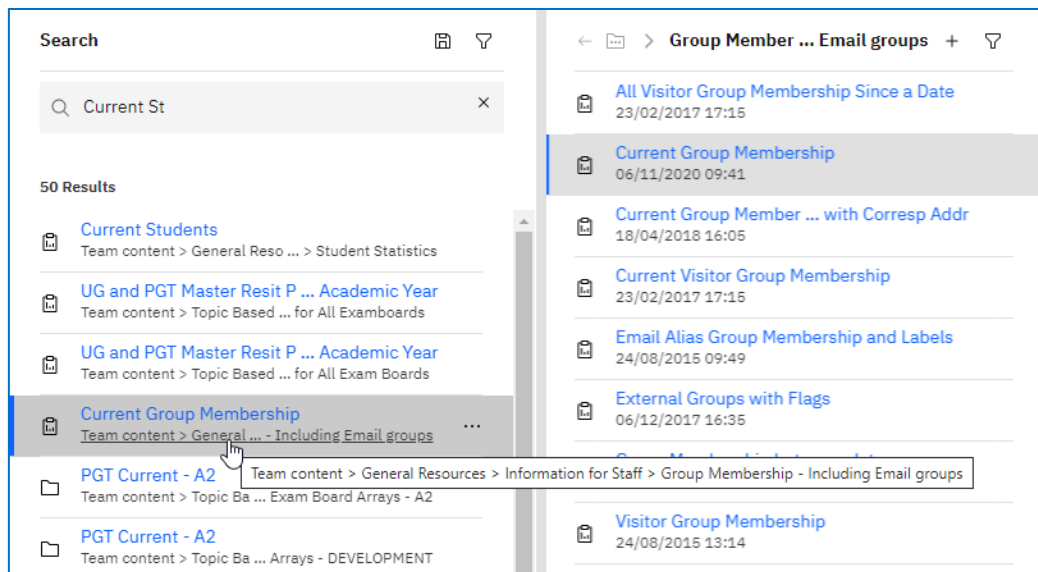
Step 5:

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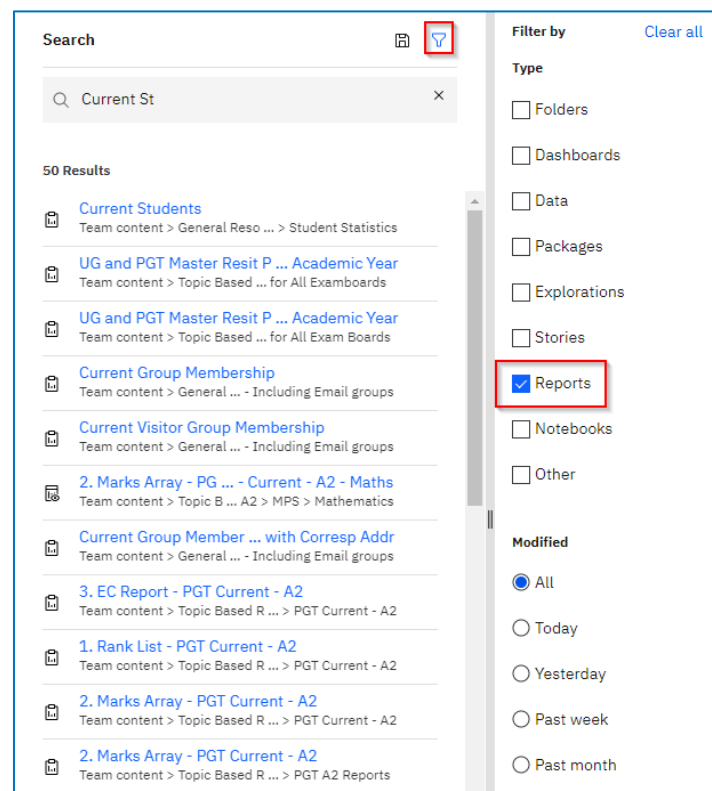
Step 6:

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**)
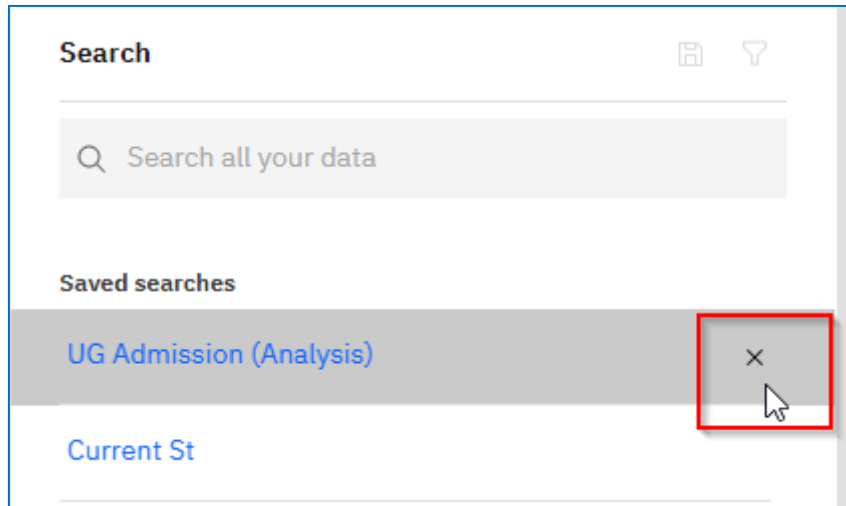
3. Saving a Personal Copy of a Report

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.
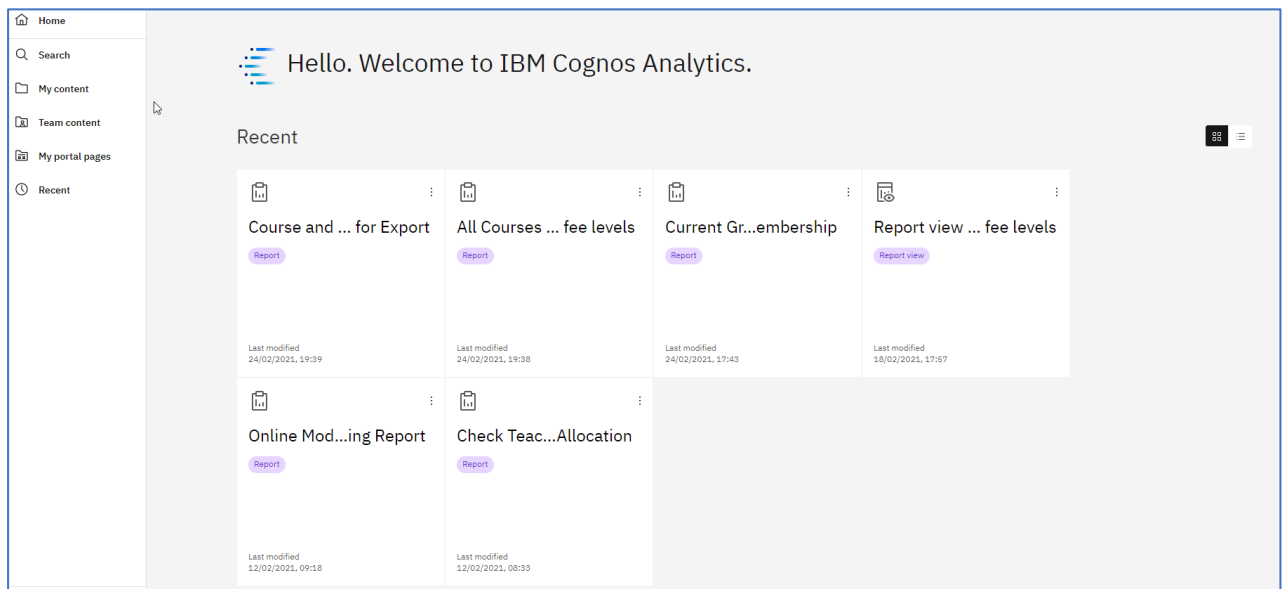
Step 2 (Create a Report Shortcut):

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 shorcut to the report in your '**My Content**' area and you can run the report directly from that shorctut. You can delete these shorcuts using the **More** (three dots) options in your 'My Content' area.
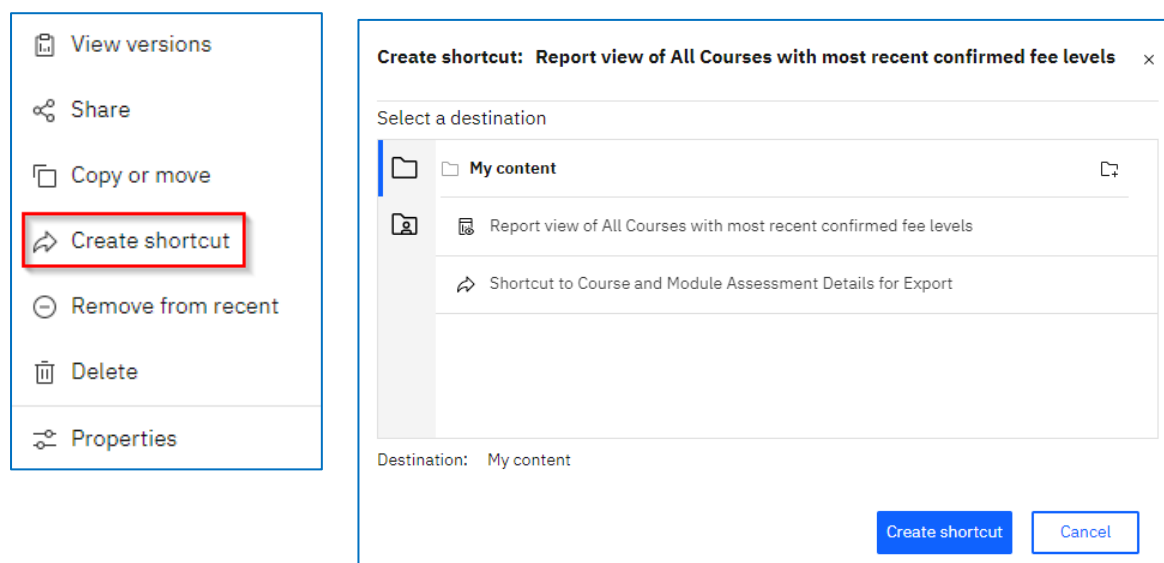
Step 4 (Create a Report View):

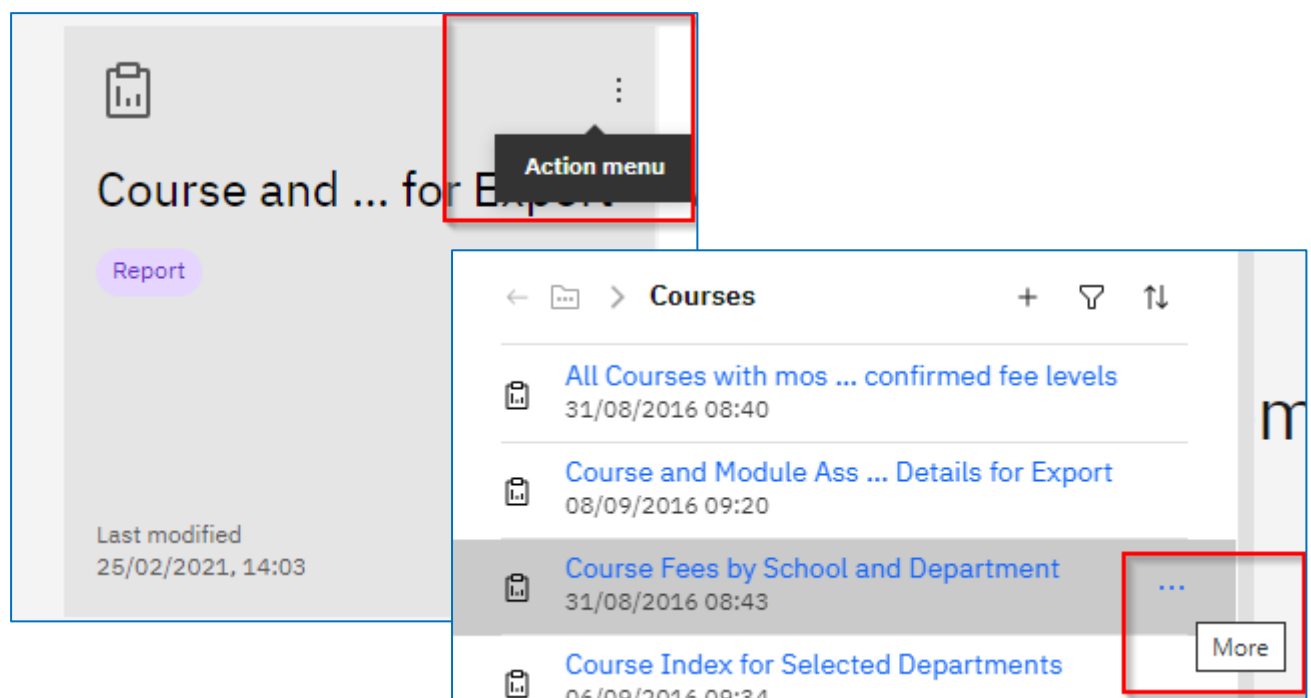On the **Action** or **More** menu choose '**Create report view**' and then select '**My Content**' as the destination on the **Save as** menu and change the **Report View** name if required. A report view is created in your 'My Content' area and this can be customised for your convenience (outlined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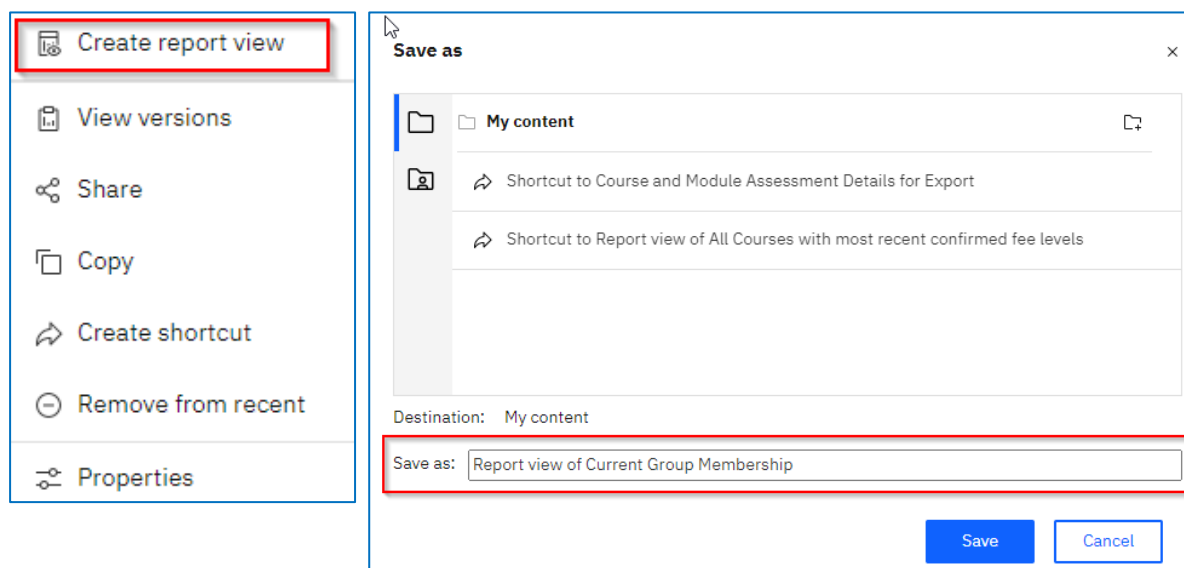
4. Customising a Report View ('My Content' area)

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

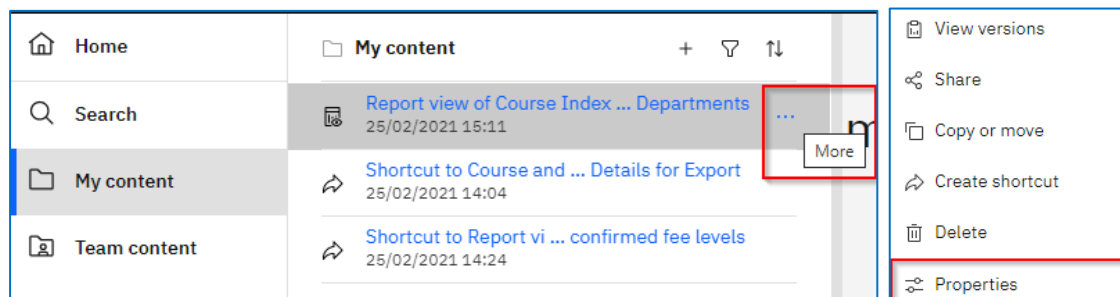- Change the default action of the **Report View** ('Run the report' or 'View the most recent version')
- **Report View** output – set the report view output to Excel instead of default PDF
- Pre-set **Prompts** – define the prompt values to use when the **Report View** runs
- **Save** versions of the **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**'
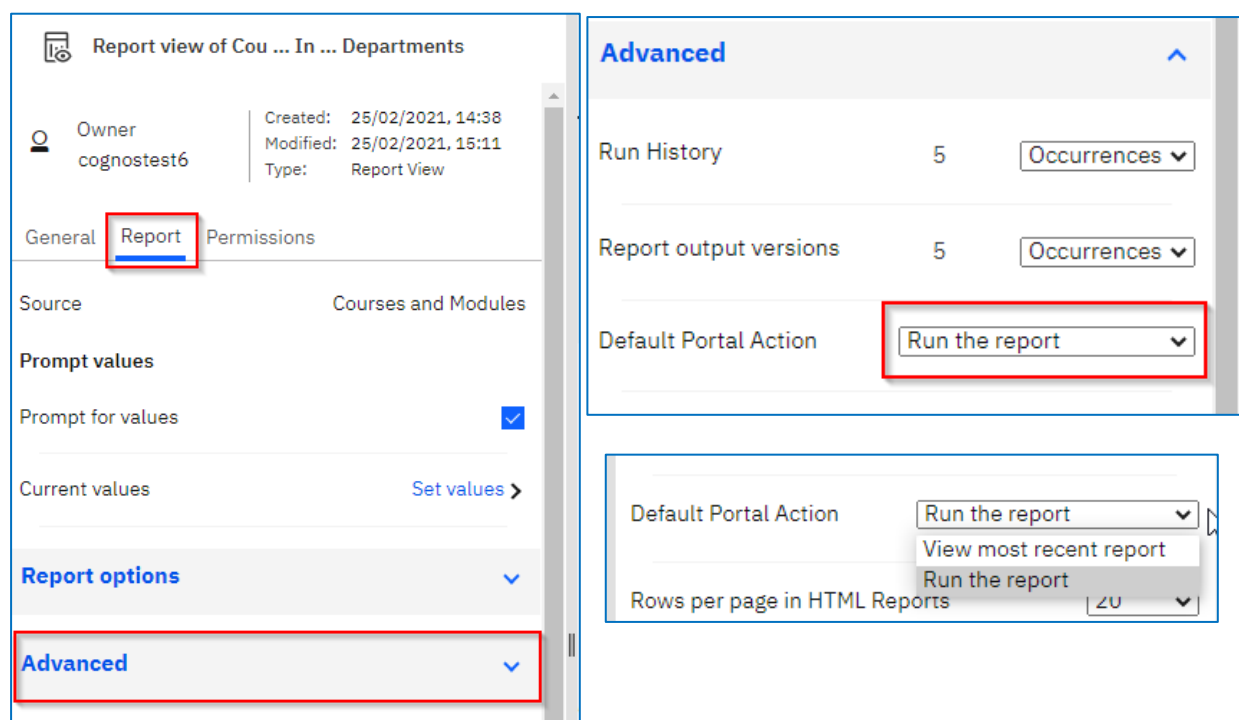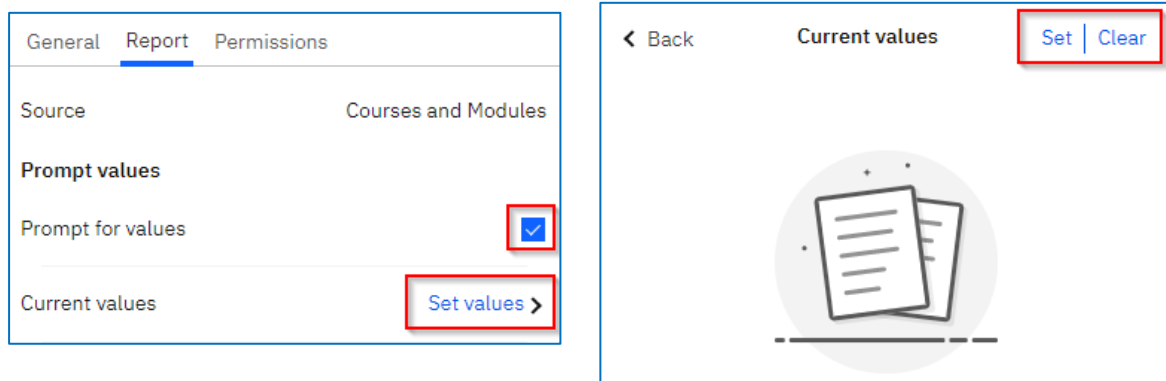
Step 2 – Change the Report View output:

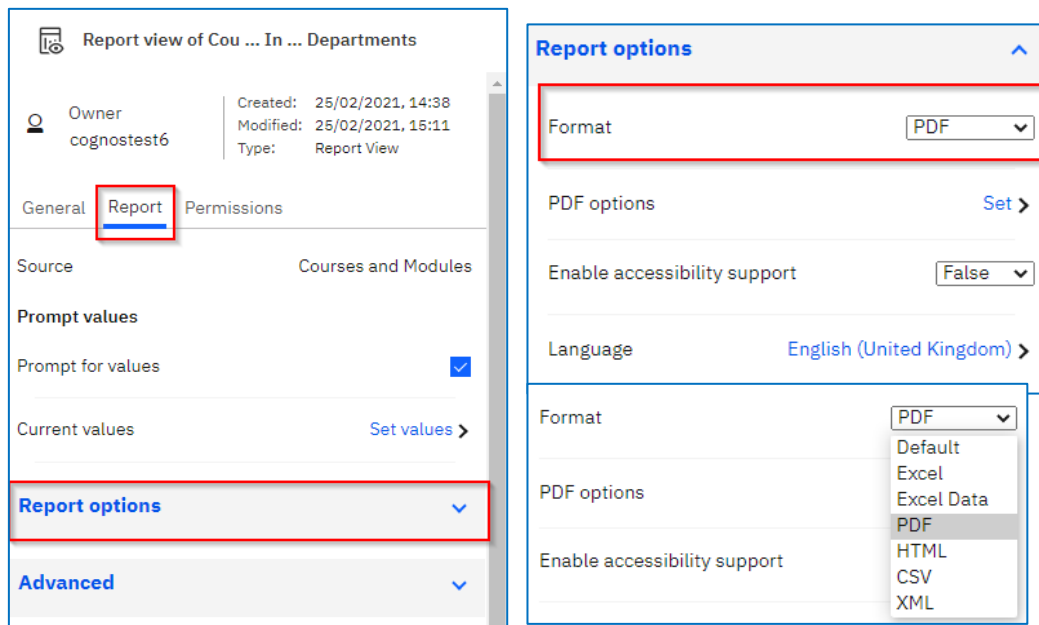Expand the **Report options** option on the **Report** tab and change the **Format** from '**PDF**' to '**Excel**' (or any other choice)
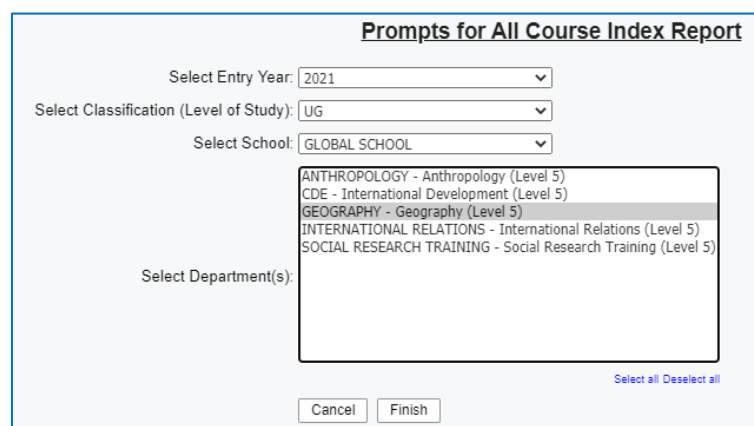
Step 3 – Pre-Set Prompts for the Report View:

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

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

These **Prompt** choices are now stored in the **Report View** and will run automatically on each **Report View** run

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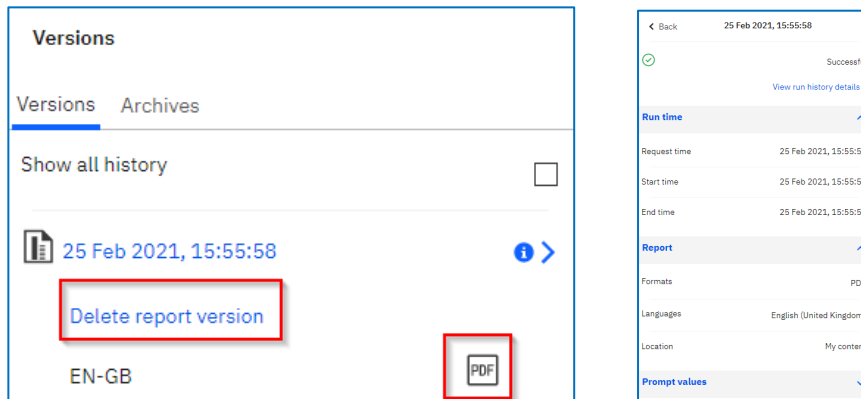
The number of **Report Versions** available is controlled in the **Report View** properties, under the **Report** tab > **Advanced** > **Report output versions**
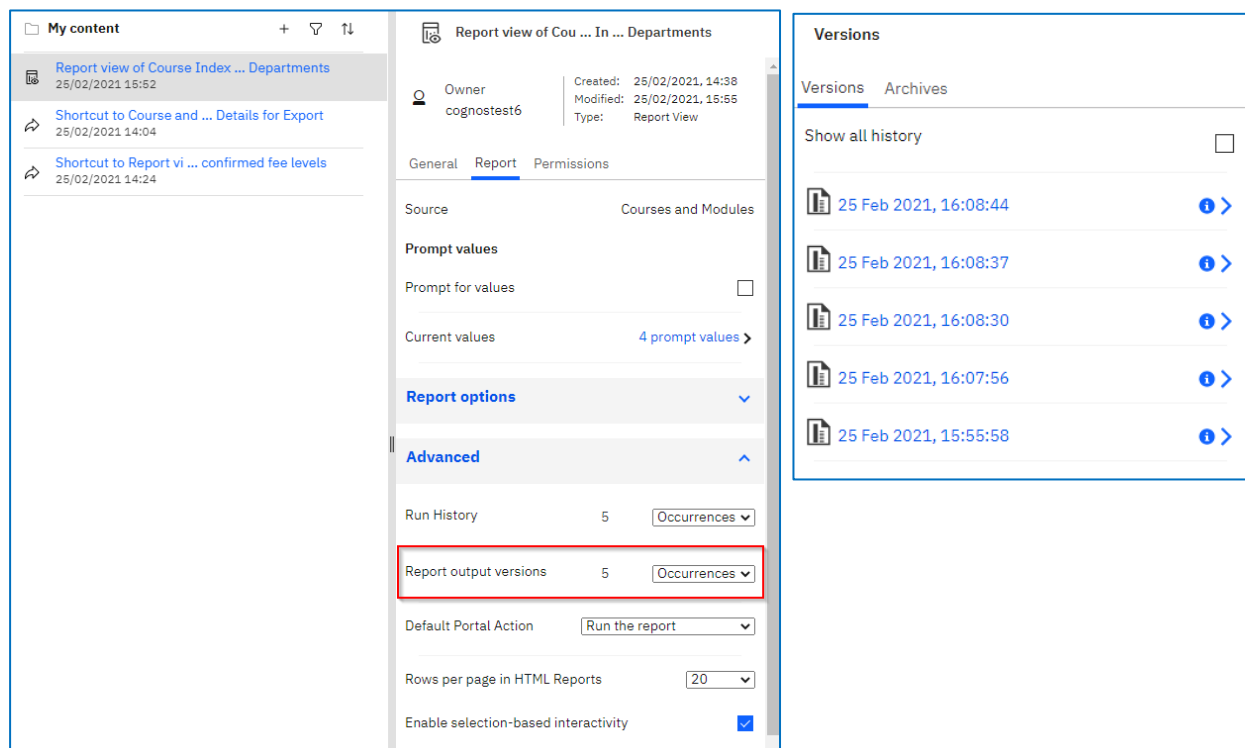
5. Help and Learn Resource

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
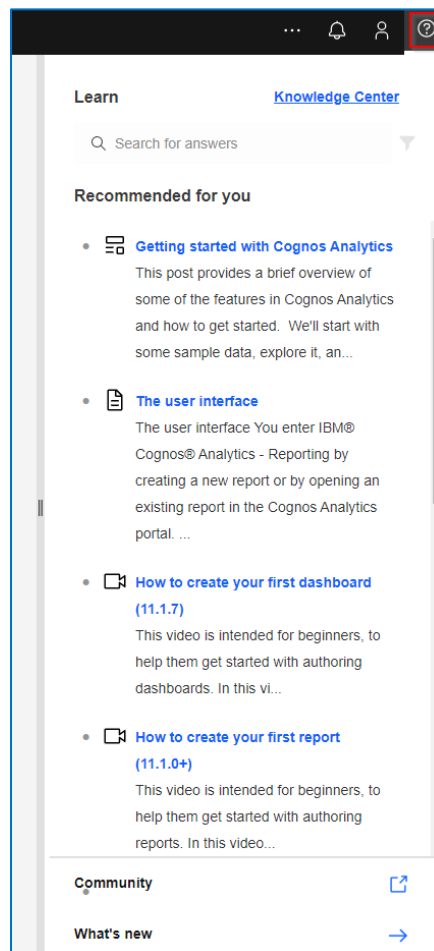
Step 2:

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
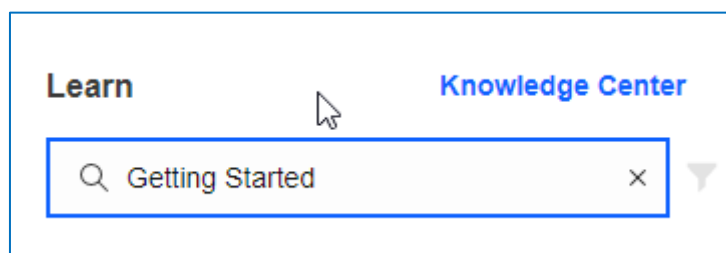
Step 3:

Click on **Knowledge Center** to access the official **IBM Cognos Analytics Version 11.1** documentation
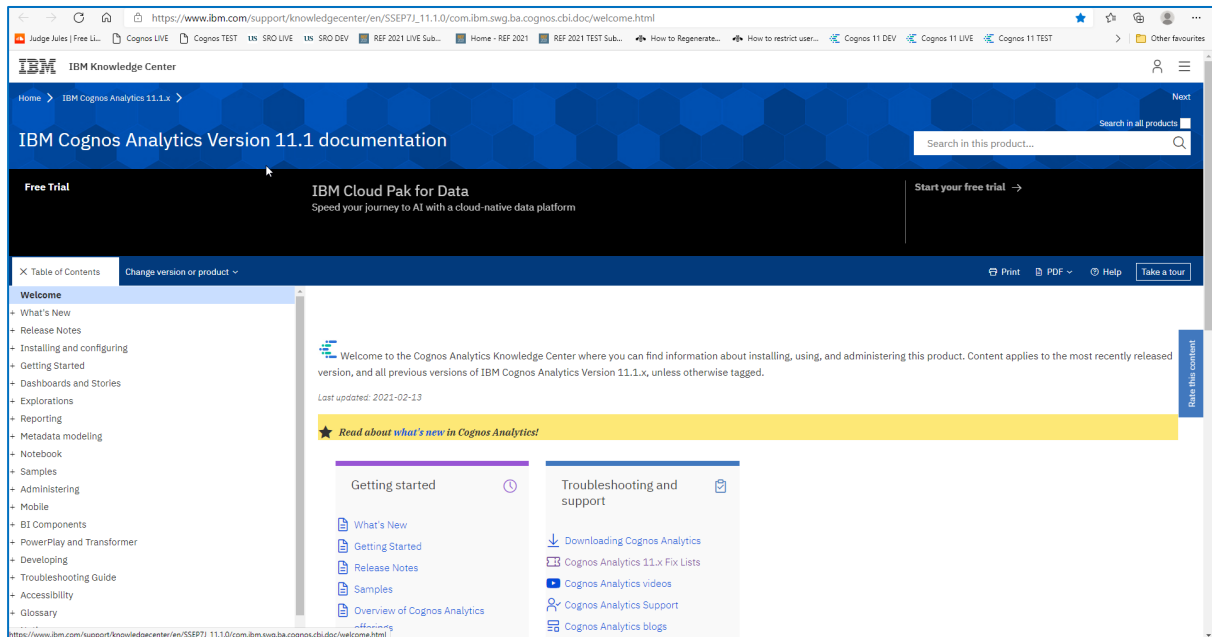
Step 4:

Click on **What's New** to find out what is contained in the current and past releases of **Cognos Analytics 11.1.x**
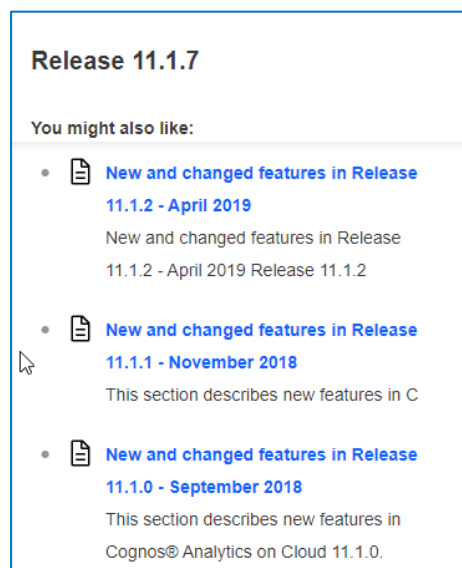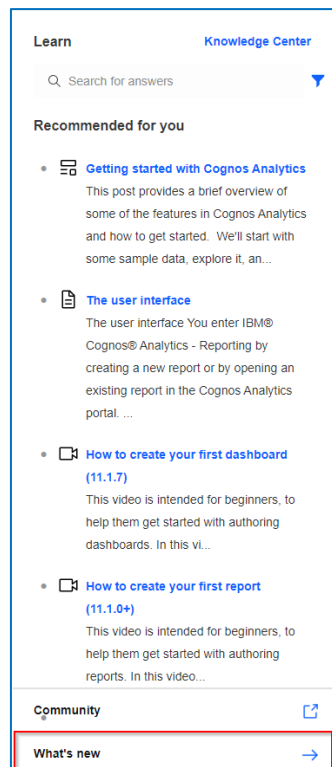
6. Set a Homepage

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**.
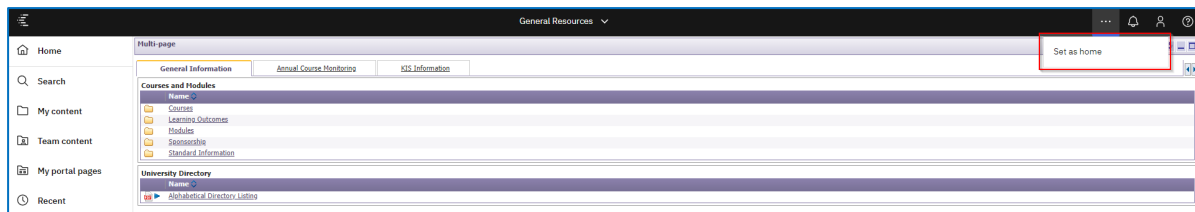
Step 2:

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

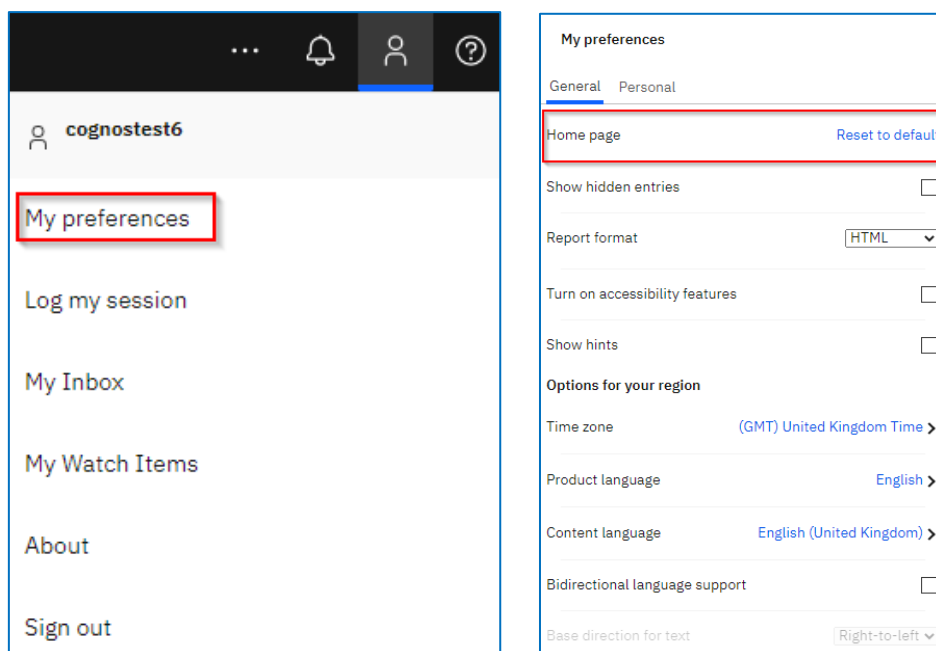| Cognos Viewers:	
Browser	**Version**
Apple Safari	9, 10, 11, and future fix packs
Apple Safari on iOS	12.x and future fix packs
Google Chrome	(latest release) and future fix packs
Microsoft Edge	44 and future fix packs
Microsoft Edge Chromium	Any Version and future fix packs
Microsoft Internet Explorer	11 and future fix packs
Mozilla Firefox ESR	68, 78 and future fix packs
Cognos Authors: Same as Viewers but note the limitations	
Browser	**Limitations**
Apple Safari	No Analysis, Query or Event Studio
Apple Safari on iOS	No Authoring, Analysis, Query or Event Studio
Google Chrome	No Analysis, Query or Event Studio
Microsoft Edge	No Analysis, Query or Event Studio
Microsoft Edge Chromium	No Analysis, Query or Event Studio
Microsoft Internet Explorer	
Mozilla Firefox ESR	
For the latest compatibility see: Cognos Analytics 11.1.7.0 - Related software for a specific product (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