Getting Started with IBM Cognos 10 Reports

ITS CIS 9/2/2015

Introduction to some of the features in the Cognos Connection reporting portal. Guides users through initial configuration of their reports portal, locating, and running reports.

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1. Quick Guide to running reports in Cognos 10

Step 1 - Navigate to 'Cognos v10' on the Business Applications login page (http://www.sussex.ac.uk/its/services/staffservices/businessapplications).



Step 2 - Enter your usual email login name and password.

	H	<u>lelp</u>
000	Log on Please type your credentials for authentication.	1
	Namespace: AD_US User ID: Password:	
	OK Cancel	
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Step 3 - Locate your report listing in the relevant Cognos portal tab. E.g. For Module Checking reports click on General Resources Portal Tab.

Ge Re	eneral Resources ports Portal Tab	Student Administration Reports Portal	Tab				
IBM	Cognos Connection					cognostest4	Log Off 💠
il.	Public Folders My Folders Ger	neral Resources Studer	nt Administr	ation			
Advan Course	ced ¥	Entries: 1	- 10	4			
	Name 🗘						
103	Learning Outcomes Mapping						
	Learning Outcomes Mapping With Learning Ou	tcome Text					
202	Module and Assement Learning Outcomes (Wit	h Course Filter)					
100	Module and Assessment Learning Outcomes						
101	Module Details						
100 P	Module Details - Academic Sessions 11/12 and Module Tedau and Teaching Methods	earlier					
	Module Listing by Keyword Search						
	Module Listing by Reyword Search Module Maintenance Check Form						
	Module Pre-Regs, Co-Regs and Excluded Com	pinations					
14114 P.							

Step 4 - Click on your chosen report from the report listing and enter prompt selections where appropriate.

Ē.	Public Folders	My Folders	General Resources	Student Administration	
Sea Adva	rch: <u>Full text and all</u> anced ≽	fields T			
Cour	se and Modules			Entries: 1 - 10	
	Name 🔷				
	 Learning Outcome 	es Mapping			
	 Learning Outcome 	es Mapping With Lear	ning Outcome Text		
	 Module and Asser 	ment Learning Outco	mes (With Course Filter)		
100 P	 Module and Acces 	ssment Learning Out	tomes		
	 Module Details)			
. DEG 🕨	 Module Dotails - A 	Academic Sessions 11	/12 and earlier		
	 Module Index and 	d Teaching Methods			
	 Module Listing by 	Keyword Search			
105 P	 Module Maintenar 	nce Check Form			
	 Module Pre-Reqs, 	, Co-Regs and Exclud	led Combinations		

Step 5 - Print PDF (default report format) or Save report to Excel by clicking on the down arrow next to the pdf icon then click on View in Excel Options to select the correct version for your pc.

🚔 Keep this version 🔻	▶ ⊕ ⊕ ₩ ▼	📷 💌 🎬 Add this report
		View in HTML Format View in PDF Format
Module Details	View in Excel 2007 Data View in Excel 2007 Format View in Excel 2002 Format	Wiew in Excel Options ▶
N1545	View in CSV Format	
Global Strategy		
Credits: 15 Level: Level 6 Term: T1 Academic Year: 15/16		

Step 6 - the download dialog box will then prompt you to open or save the report in the chosen format.

Step 7 - Log out of Cognos reports by clicking the 'Log Off' link at the top to the page



<u>2. How To...</u>

A. LOCATE REPORTS

There is a quick search and advanced search facility in the Cognos Connection Portal.

Quick Search

Step 1 - Type your search criteria (e.g. all or part of the report title) into the text box on the main portal toolbar.

🖇 Public Folders - IBM Cogno 🗴 🙆 Module Details - IBM Cognos 🛛 US Business applications : Staff ser					
IBM Cognos Connection	cognostest4 Log Off	à• : • 0• IBM.			
Public Folders My Folders General Resources Student Administration					
Public Folders	III 📰 🔛 📽 💖	📑 😽 🗈 🍙 🗶 🗊			
	Entries: 1	- 4 🔘 (())			
I Name ¢	Modified ¢	Actions			
Topic Based Resources	30 July 2015 10:45:50	More			
🗐 🧯 General Resources	2 June 2015 06:56:39	More			
🗐 🦕 Portal Tabs	20 March 2015 09:48:18	More			

Step 2 - Select what field(s) you wish to search by clicking on the down arrow beside the search icon.

Log Off 🛛 💉 🛛 Module details	🔍 - 🛛 🏦 - 🛛 🛛	- IBM.
	 Full text and all fields 	
	Name field	P
📰 🗄 l 😂 🎙	Description field	× 🗔 抗
	Name or description field	
Entrie		
Modified \$	Actions	
30 July 2015 10:45:50	More	
2 June 2015 06:56:39	More	
	—	

Step 3 - Click on the search icon 🔯

A list of items matching your criteria will be returned. Please note that the quick search by default searches all objects within the folder you happen to have open at the time (i.e. it may return reports but also folders, portal tabs etc). The results returned will allow you to refine your search.

B. ADD A PORTAL TAB

A number of topic and role specific portal tabs have been created to provide logical groupings for your reports. Portal tabs have been created for General Resources such as course and module listing reports but also for specific areas such as REF 2014

These can be added to the tab area alongside 'Public Folders' and 'My Folders' to ease navigation to your reports.

To add 'Student Administration' portal tab to your tab area either use the search facility described above and search for Student Administration or navigate to the parent tab below

Step 1 - On the tab menu to the left of Public Folders, click on the tab icon drop down and select 'Add Tabs'

IBM Cognos Connection	'n	cognostest4 Log Off
Add tabs Add tabs Remove this tab Modify the sequence of tabs	My Folders General Resources	

Step 2 - Locate the Student Administration tab at the following location:

Cognos > Public Folders > Portal Tabs > Topic Based Portal Tabs > Student Administration Portal Tabs > Student Administration Master Tabs

Select portal tabs (Navigate) - cognostest4			
Navigate the folders or search to find the entries to include as portal tabs. Select the entries you want and click the A	Add button to update the Sele	cted entries list.	
Available entries Cognos > Public Folders > Portal Tabs > Topic Based Portal Tabs > Student Administration Portal Tabs > Student Administration Master Tabs		Selected entries	Entries: - O
Entries: 1 - 1 🔘 4 (4) > >	4	Image:	
Name			
🕼 🖬 Student Administration			
			No entries.

Step 3 - In the select portal tabs screen check the box next to the tab you want to add (in this case Student Administration) and click on the yellow arrow to the right of the selection area to add it to your list. Then click OK at the bottom left of your screen.

Step 4 - You will now see the portal appear next to My folders on the tab bar.

IBM Cognos Connection	cognostest4 Log Off 💉	/ A • 1 • 0 • IBM.
Public Folders My Folders General Resources Student Administration		•
Public Folders	📖 🏭 🕍 📽 🕻	👂 🖬 😽 🗈 💼 🗙 🗔 😚
	Entries: 1	- 4 🔘 (()))
Name ¢	Modified ¢	Actions
Topic Based Resources	30 July 2015 10:45:50	More
📄 🧰 General Resources	2 June 2015 06:56:39	More

3. Saving Copies of your Reports

You can use your personal folder (My Folders) within the portal to save views or recently run reports.

It may be convenient to keep a view (or shortcut) for a frequently used report in your 'My folders' area for ease of access.

Step 1 - Use the search facility (see **How to locate reports** above) or select from the relevant portal tab or navigate via public folders to your chosen report.

	Name 🗘	Modified 0	Actions
🔲 📠 Þ	Learning Outcomes Mapping	8 October 2014 16:14:54	🔲 🎬 More
🔲 📠 Þ	Learning Outcomes Mapping With Learning Outcome Text	17 March 2015 17:13:13	🔲 🔡 More
📄 📠 Þ	Module and Assement Learning Outcomes (With Course Filter)	31 March 2014 12:06:36	🔲 🎬 More
🔲 📠 Þ	Module and Assessment Learning Outcomes	13 December 2013 15:29:44	🔲 🔡 More
	Module Details	6 July 2015 09:50:58	🔲 🔡 More

Step 2 - click on the 'create a view of this report' icon

Step 3 - Give your view of the report a name and description and in the location section (see below) click on 'Select My Folders' or 'Select another location' to save the report in your chosen folder. In the example below a view of the module checking form is being saved for Anthropology.

Specify a name and description - New Report View wizard Specify a name and location for this entry. You can also specify a description	n and screen tip.
Name:	
Anthropology Modules 15/16	
Description:	
Module Checking Form for all Anthropology Modules	*
Screen tip:	
Module Checking Form for all Anthropology Modules	
Location: My Folders Select another location	
Cancel < Back Next > Finish	

Saving your own copy of the report allows you to configure the following:

- i. Change the default action on the report (report can either run against the database or simply return the last saved run of the report)
- ii. Report output set the report output to Excel instead of the default PDF
- iii. Preset prompts define the prompt values to use when the report runs
- iv. Save versions of the report if a snapshot of changing data needs to be kept, then the report output can be saved and automatically versioned (i.e. date stamped) .

A. CHANGE DEFAULT ACTION OF A REPORT

Step 1 - Navigate to the location of the report in 'My Folders' and click on the report properties icon

IBM Cognos Connection	cognostest4 Log Off 🛛 💠 📔	ヽ - à - ± -
Public Folders My Folders General Resources Student Administration		
My Folders	📖 🏭 I 📫 '	📽 💖 🖬 😽 🗈
	Entrie	es: 1 - 1
🗐 🔤 Name 🗘	Modified 0	Actions
Anthropology Modules 15/16	2 September 2015 14:20:22	More

Step 2 - In the set properties page click on the 'report' tab and then select from the drop down options to change the default action and save by clicking OK.

Set properties - Anthropology Modules 15/16		
General	Report view	Permissions
Select the defa	ault options to use for	this entry.
Default actio	on:	
View most	recent report 🝷	>
Report optio	ns:	
Override t	the default report opti	ons
Format:		
PDF	-	
Accessi	pility:	
📃 Enab	le accessibility suppor	t
Languag	je:	
English	(United Kingdom)	•
PDF opti Portrait	ons:	
Edit	Clear	
Prompt valu	es:	
No values save	ed	
Dromot fo	r values	
Prompero	1 Values	
Advanced onti		
Advanced oput	ana 🎗	
OK	Cancel	

B. CHANGE REPORT FORMAT

Step 1 - Navigate to the location of the report in 'My Folders' and click on the report properties icon

IBM Cognos Connection	cognostest4 Log Off 🔷
Dublic Folders My Folders General Resources Student Administration	
My Folders	🎟 🏝 🖆 💖 🗟 😽
	Entries: 1 - 1
Name ¢	Modified 0 Actions
□ ■ Anthropology Modules 15/16	2 September 2015 14:20:22

Step 2 - In the set properties page click on the 'report' tab and then select from the drop down options to change the report output format from PDF to excel (for example).

Set properties - Anthropology Modules 15/16
General Report view Permissions
Select the default options to use for this entry.
Default action:
View most recent report 💌
Report options:
Override the default report options
Formet:
PDF
Accessibility.
Enable accessibility support
Language:
English (United Kingdom) 🔹
PDF options: Portrait, A4 Edit Clear
Prompt values:
No values saved
Prompt for values
Advanced options 😽
OK Cancel

C. PRESET PROMPT SELECTIONS

Step 1 - Navigate to the location of the report in 'My Folders' and click on the report properties icon

IBM Cognos Connection	cognostest4 Log Off 💠	- 1 - 1-
📅 Public Folders My Folders General Resources Student Administration		
My Folders	🏥 🏦 I 😂 📽	🢖 🗟 i 🛃 🗎
	Entries:	1 - 1
Name ¢	Modified 0	Actions
Anthropology Modules 15/16	2 September 2015 14:20:22	More

Step 2 - In the set properties page click on the 'report' tab and then click on the 'set' hyperlink below the 'Prompt Values:' heading.

Set properties - Anthropology Modules 15/16
General Report view Permissions
Select the default options to use for this entry.
Default action:
View most recent report 🔻
Report options:
Override the default report options
Format:
PDF 👻
Accessibility:
Enable accessibility support
Language:
English (United Kingdom)
PDF options: Portrait, A4 Edit Clear Frompt values: No values saved Set Promot for values
Advanced options 😽
OK Cancel

Step 3 - make the prompt selections you wish to save in the report prompt page and click finish.

Step 4 - the prompt values section of the report properties page will show your pre-selected prompts. Click 'Edit' to change the prompt selections or 'Clear' to continue to prompt for values. Click OK to save the changes. In the example screen below the prompt selections are being saved for the Module Checking Form report and selections have been saved for academic year and department.

Set properties - Anthropology Modules 15/16
General Report view Permissions
Select the default options to use for this entry.
Default action:
View most recent report 💌
Report options:
Override the default report options
PDF T
Association
Enable accessibility support
Language:
English (United Kingdom) -
PDF options: Portrait, A4
Edit Clear
Prompt values:
EHEQLevelCode: 'Level 5'. ModuleAcademicSe View all Edit Clear
Prompt for values
Advanced options 😸
OK Cancel

4. Troubleshooting

A. BROWSER COMPATIBILITY

IBM Cognos 10 should be run using Internet Explorer or Firefox. Issues have been identified with running Cognos on Internet Explorer 11. Compatibility View is currently recommended and can be set as follows:

Click on 'tools' cog icon in top right hand corner of your browser screen:



Select 'Compatibility View Settings' from the drop down menu in the dialog box and add 'sussex.ac.uk' in the 'Add this website' so that you end up with the view below:

Compatibility View Settings	X
Change Compatibility View Settings	
A <u>d</u> d this website:	
	Add
Websites you've added to Compatibility View:	
sussex.ac.uk	Remove
Display intranet sites in Compatibility View	
Use Microsoft compatibility lists	
Learn more by reading the Internet Explorer privacy	<u>statement</u>
	Close
]

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. If your pdf report is opening a separate window in Adobe Reader the settings in Adobe Reader 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 (Start then All Programs then Accessories)
- 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 (Start then All Programs then Accessories)
- Go to Edit, then Preferences and click on Internet
- 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 of add-ons, select Adobe PDF Reader.
 - Note:
 - If you do not see the Adobe PDF Reader add-on, try the other options on the menu. For example, on some systems, the add-on appears when you select Run Without Permission.

- Click the Enable or Disable button (it toggles depending on the status of the selected add-on):
 - Enable sets the Adobe PDF Reader add-on to open PDFs in the browser.
 Disable turns off the add-on so it does not open PDFs in the browser.

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