

UNIVERSITY OF SUSSEX

Getting Started with IBM Cognos 10 Reports

ITS CIS
9/2/2015

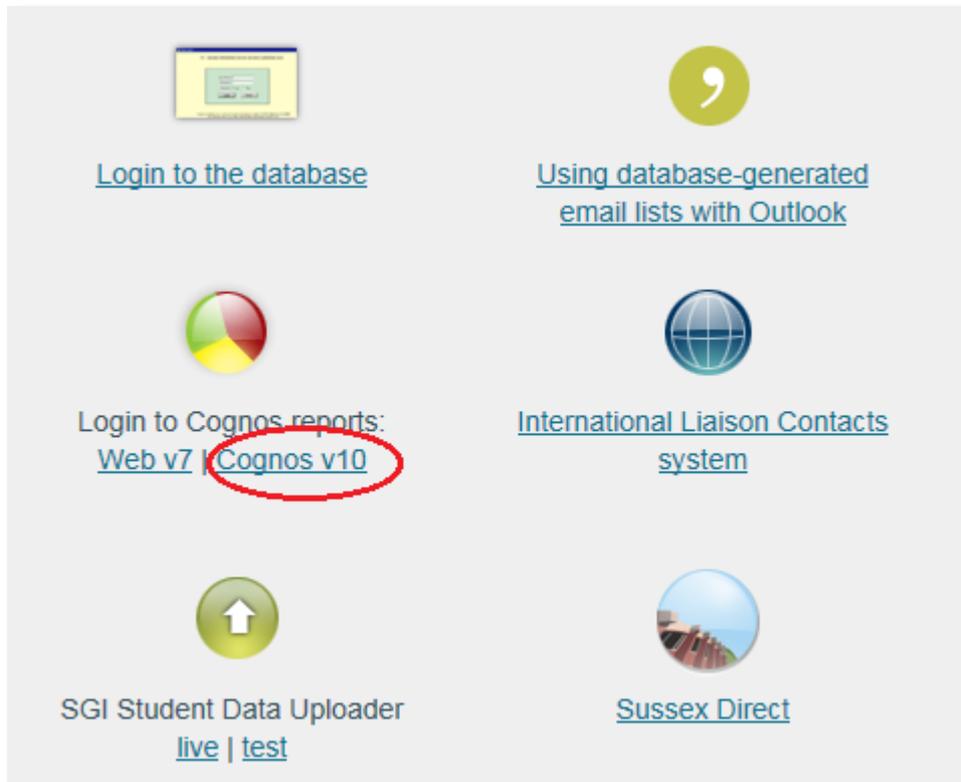
Introduction to some of the features in the Cognos Connection reporting portal. Guides users through initial configuration of their reports portal, locating, and running reports.

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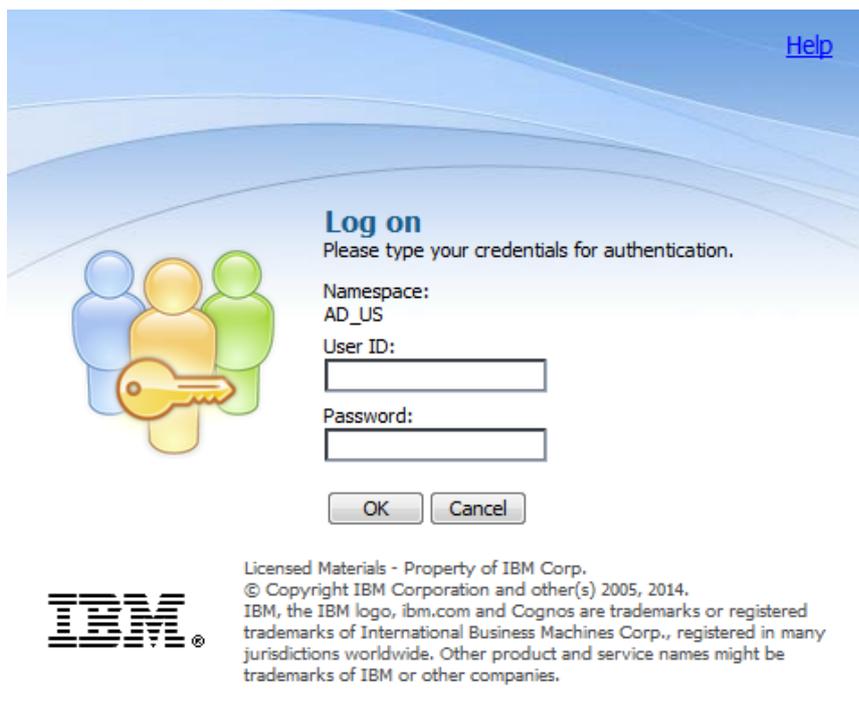
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1. Quick Guide to running reports in Cognos 10

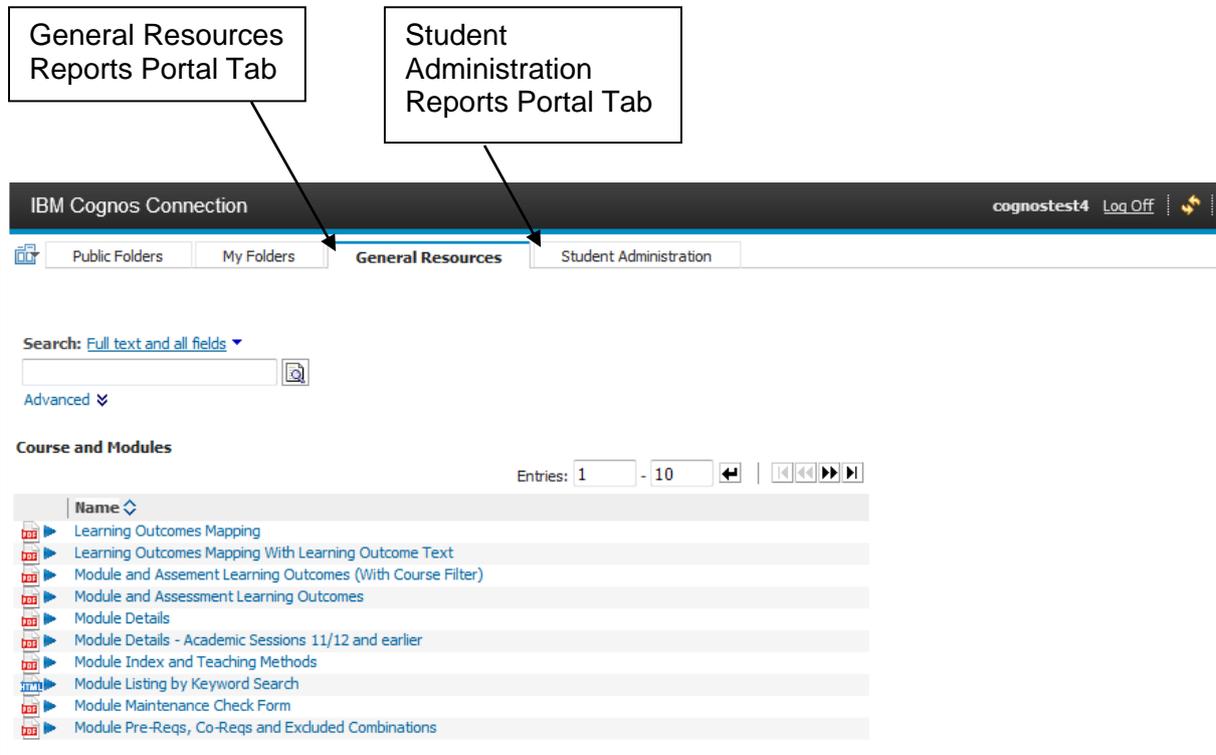
Step 1 - Navigate to 'Cognos v10' on the Business Applications login page (<http://www.sussex.ac.uk/its/services/staffservices/businessapplications>).



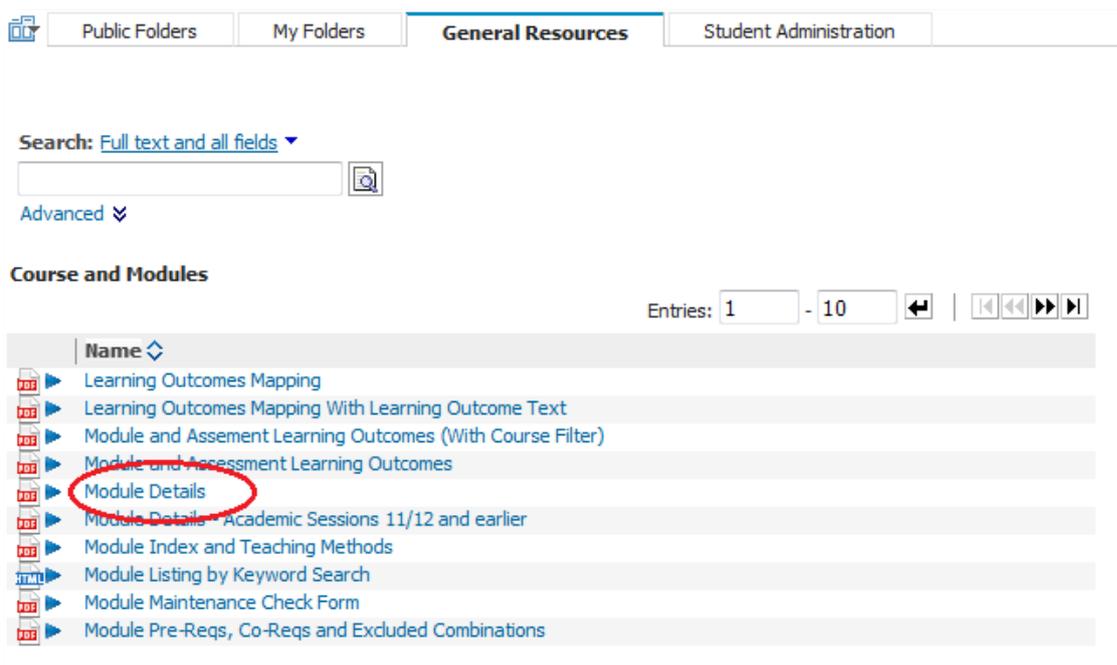
Step 2 - Enter your usual email login name and password.



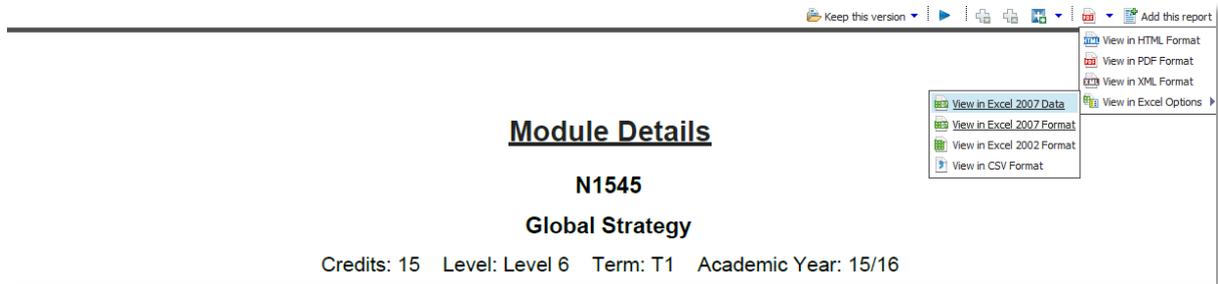
Step 3 - Locate your report listing in the relevant Cognos portal tab. E.g. For Module Checking reports click on General Resources Portal Tab.



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

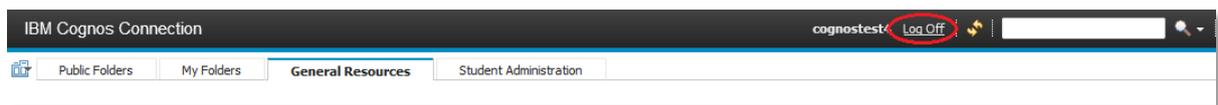


Step 5 - Print PDF (default report format) or Save report to Excel by clicking on the down arrow next to the pdf icon then click on View in Excel Options to select the correct version for your pc.



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



2. How To...

A. LOCATE REPORTS

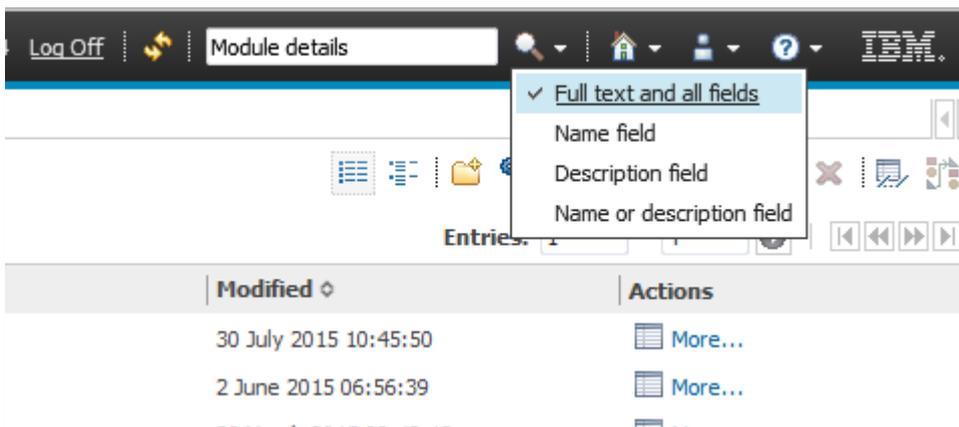
There is a quick search and advanced search facility in the Cognos Connection Portal.

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.



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



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.

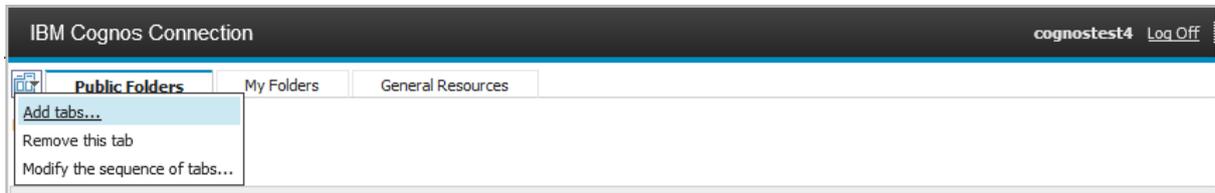
B. ADD A PORTAL TAB

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

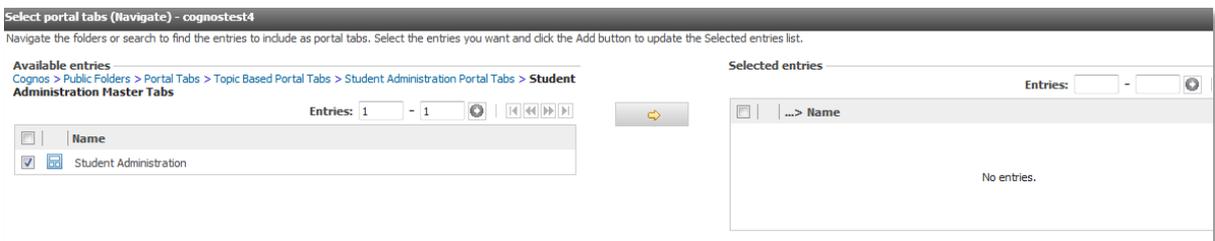
These can be added to the tab area alongside 'Public Folders' and 'My Folders' to ease navigation to your reports.

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'

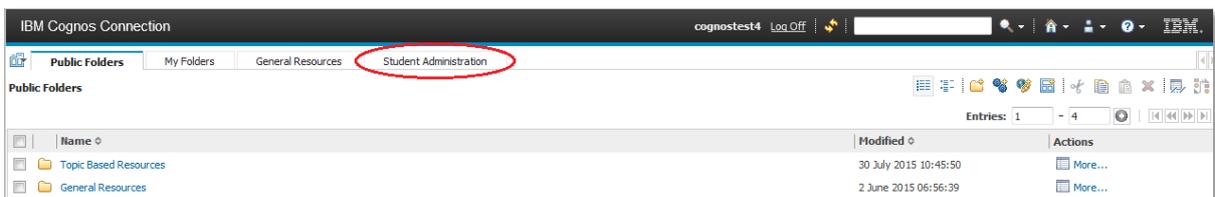


Step 2 - Locate the Student Administration tab at the following location:
Cognos > Public Folders > Portal Tabs > Topic Based Portal Tabs > Student Administration Portal Tabs > Student Administration Master Tabs



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.



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	Actions
Learning Outcomes Mapping	8 October 2014 16:14:54	More...
Learning Outcomes Mapping With Learning Outcome Text	17 March 2015 17:13:13	More...
Module and Assessment Learning Outcomes (With Course Filter)	31 March 2014 12:06:36	More...
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 and screen tip.

Name:

Description:

Screen tip:

Location:
My Folders
[Select another location...](#)

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

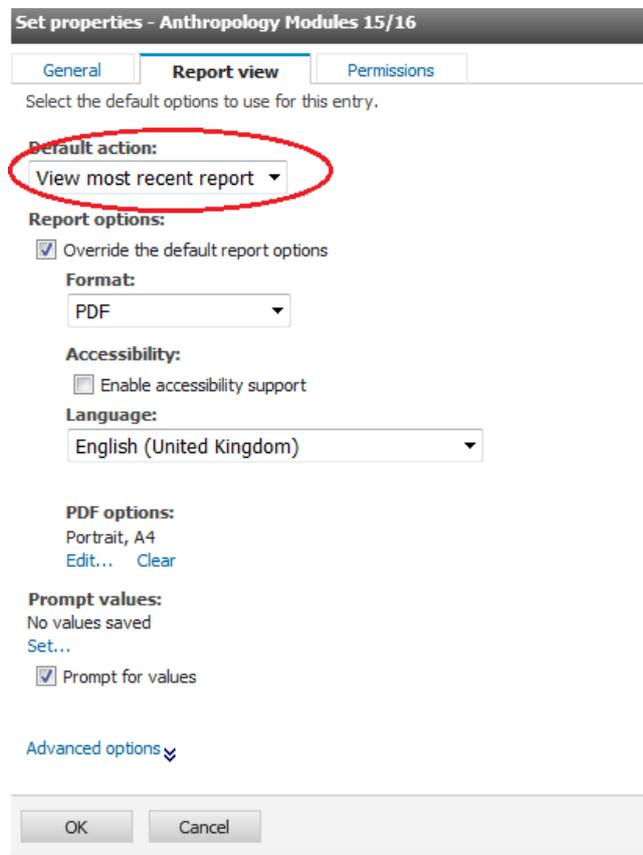
- i. Change the default action on the report (report can either run against the database or simply return the last saved run of the report)
- ii. Report output – set the report output to Excel instead of the default PDF
- iii. Preset prompts – define the prompt values to use when the report runs
- iv. 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 

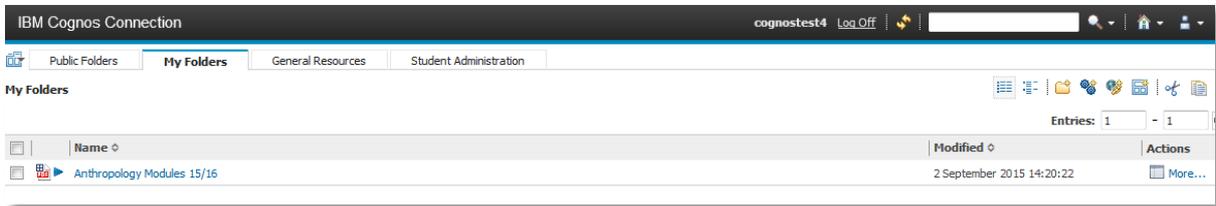


Step 2 - In the set properties page click on the 'report' tab and then select from the drop down options to change the default action and save by clicking OK.

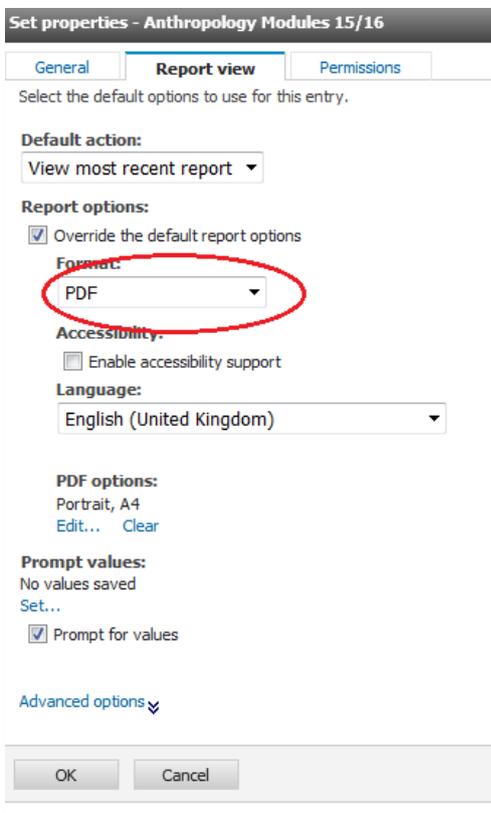


B. CHANGE REPORT FORMAT

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



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).



C. PRESET PROMPT SELECTIONS

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

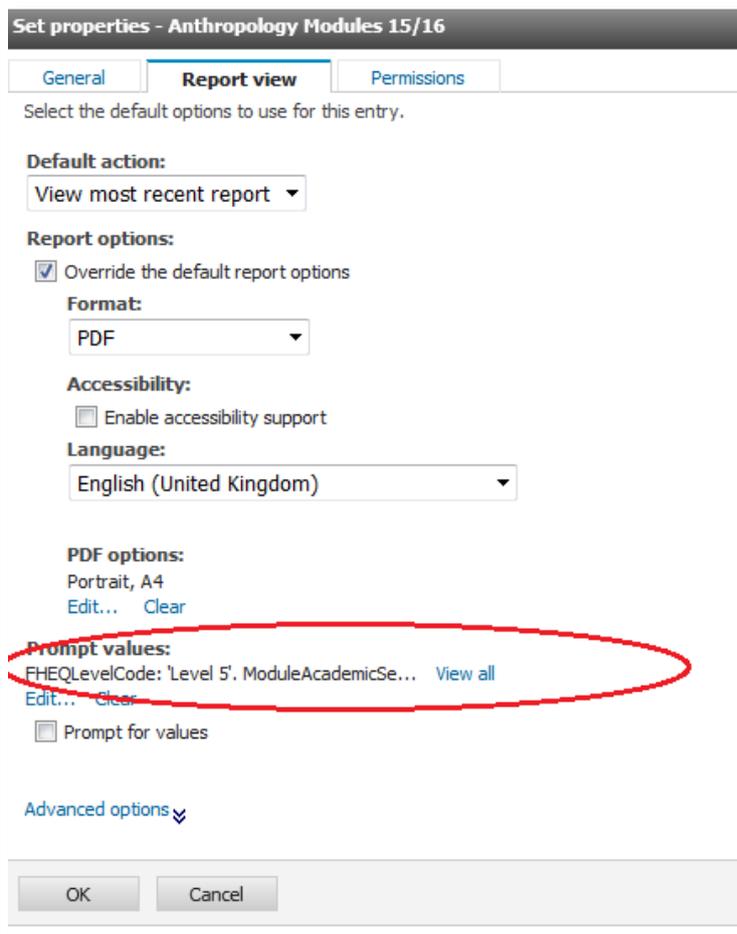


Step 2 - In the set properties page click on the 'report' tab and then click on the 'set' hyperlink below the 'Prompt Values:' heading.

The screenshot shows a dialog box titled "Set properties - Anthropology Modules 15/16" with three tabs: "General", "Report view" (selected), and "Permissions". Below the tabs, it says "Select the default options to use for this entry." The "Default action:" is set to "View most recent report". Under "Report options:", the "Override the default report options" checkbox is checked. The "Format:" is set to "PDF". The "Accessibility:" checkbox "Enable accessibility support" is unchecked. The "Language:" is set to "English (United Kingdom)". Under "PDF options:", it shows "Portrait, A4" and links for "Edit..." and "Clear". The "Prompt values:" section is circled in red and shows "No values saved" and a "Set..." link. Below this is a checked checkbox for "Prompt for values". At the bottom, there are "OK" and "Cancel" buttons.

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.



4. Troubleshooting

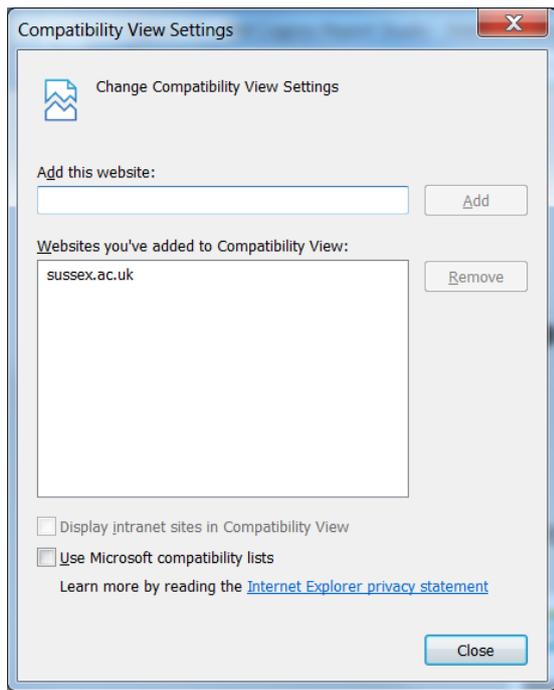
A. BROWSER COMPATIBILITY

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:



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.