Cognos Web Reports

IBM Cognos Software

My Content
- My home
- IBM Cognos contest
- My Inbox

My Actions
- Create workspaces on the web
- Query my data
- Analyze my business
- Author advanced reports

Training Manual
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Cognos & ODS

Banner contains over 1,000 oracle tables from the Student Information System. ODS (Operational Data Store) is a data repository that combines data from Banner tables into many tables called views. Cognos is an “Enterprise Reporting” tool using the views in ODS to create reports that are stored in secured folders for easy access.

Since ODS contains Banner data which is used for Cognos reports, data integrity is critical for accurate reporting of information to the institution, state, and federal agencies.
Login & Logout

Users may log into Cognos via Yavapai College’s portal or using the “Back Door” URL.

YC Portal login

1. Log in to the YC Portal [http://www.yc.edu].
2. Enter your username and password.
3. Click on the login button or press enter key.
4. At the top of the ribbon, locate My Services.
5. Select Cognos Main Menu from the drop down list.
6. Click on My home to access Cognos reports.

Your screen will look different than this image since the contents are customized based on your role & security.
Back Door Login – Not Using the Portal

Access Cognos by opening your Internet Explorer browser and typing the following URL address: http://reagan.yc.edu and click on the Cognos Reporting System link.

1. Enter your user id and password.
2. Click the OK button.
Need help with login credentials?

Contact YC Help Desk

Email
- helpdesk@yc.edu

Internet
- Navigate directly to the Help Desk/ITS webpage to submit the form

Logoff from Cognos

Due to security issues, it is very important to properly end your Cognos session and close the browser window.

Always use the Log Off menu option at the top menu bar.
Browsers

Internet Explorer 11 (IE)

- YC’s portal link will open and load Cognos into a new window
- IE is the default browser for YC’s home page, portal and Cognos
- Cognos will timeout after long periods of inactivity, which results in having to log back into Cognos
- If you are a heavy Cognos user, it is recommended accessing Cognos via the direct connection or through the “back door”
- Cognos is an IBM product that only supports the IE browser

Sometimes Internet explorer requires you to hold down the CTRL key when running reports formatted for Excel to allow your report to display in a pop-up window
Add YC as Trusted Sites
Cognos reports require pop-ups and therefore requires YC sites to be trusted.

- Preferred Method – Turn pop-ups on and add YC to trusted sites
- Can control pop-ups through the Tools Menu
- Can create a list of allowed sites that IE will allow pop-ups. This will prevent pop-ups from other web sites

1. Click on the Tools Menu Gear icon
2. Select Internet options
3. Click on the Security tab
4. Select Trusted sites
5. Click on the “Sites” button
6. In “Add this website to the zone” field, type https://*yc.edu
7. Uncheck “Require server verification (https) for all sites in this zone
8. Click Add
9. Click Close
10. Click OK
11. Click on the Privacy tab
12. Check Turn on Pop-up Blocker
13. Click on the “Settings” button
14. In “Address of website to allow:” field, type https://*yc.edu
15. Check “Show notification bar when a pop-up is blocked.
16. Click Close
17. Click OK
Cognos Connection

Two Tabs

- **Public Folders**
  Contain YC’s reports organized by departments into folders and subfolders

- **My Folders**
  Contain your customized folders, shortcuts to reports and report view links to reports

You will not see all the folders displayed here on this screen, since your folders & reports are filtered based on your security settings.
Cognos Navigation

Next Page – Navigate to next page of Cognos reports or folders.

Previous Page – Navigate to previous page of Cognos reports or folders.

My Preferences – Allows you to define personalized page settings.

Search – Search Cognos directory of reports.

Detail Reports – Includes report comments or descriptions.

List Reports – List of reports without comments.

Folder – Folder or subfolder containing Cognos reports.

Cognos Report types icons -

Excel – report format will be in excel 2007 format

HTML – report format will be displayed in browser (html format)

Report View – the report is run from a master report in a different folder location

PDF – report will be in a pdf format

CSV – report will be in a csv format

XML – report will be in an xml format
Set My Preferences

- Allows you to change number of viewable entries in list view page
- Select style preference for line separators (suggest alternate backgrounds)
- Click OK to save changes
- Ignore other settings
**Run & View Reports**

- Navigate to the folder where a report is stored.
- Click on the report title to run the report.

As you click on subfolders you leave a trail of “bread crumbs” (folder names — Public Folders > Student > Class Schedule Reports). You can click on any folder name in the “bread crumb trail” to jump to the contents of that folder.

Most reports include prompt options in a drop down list. This particular report prompts for an academic period.

**Cancelled Courses**

- Fall 2009
- Fall 2010
- Fall 2011
- Fall 2012
- Fall 2013
- Fall 2014
- Fall 2015
- Fall 2016
- Fall 2017
- Spring 2010
- Spring 2011

Select all  Deselect all

Once an academic period is selected the Finish button is highlighted and available to run the report.
Sample Report

Cancelled Courses Report in HTML ("web page") format

- Reports typically contain a Report Header and a footer with date and time
- Reports can contain multiple pages and even multiple reports

### Cancelled Courses

<table>
<thead>
<tr>
<th>COURSE_IDENTIFICATION</th>
<th>COURSE_REFERENCE_NUMBER</th>
<th>TITLE SHORT DESC</th>
<th>CAMPUS DESC</th>
<th>STATUS</th>
<th>LECTURE_CONTACT_HOURS</th>
<th>LAB_CONTACT_HOURS</th>
<th>TOTAL_CONTACT_HOURS</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCT221</td>
<td>39127</td>
<td>Principles of Accounting II</td>
<td>Prescott</td>
<td>Cancelled</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>ACCT261</td>
<td>39128</td>
<td>Quant Accnt &amp; Quantwrs</td>
<td>Prescott</td>
<td>Cancelled</td>
<td>15</td>
<td>48</td>
<td>64</td>
</tr>
<tr>
<td>AGEL222</td>
<td>39179</td>
<td>Prin of Equine Nutrition</td>
<td>China Valley Agriculture</td>
<td>Cancelled</td>
<td>8</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>AGEL225</td>
<td>39117</td>
<td>Equine Behavior and Psychology</td>
<td>China Valley Agriculture</td>
<td>Cancelled</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>AGEL225</td>
<td>39118</td>
<td>Equine Behavior and Psychology</td>
<td>Yankton Valley</td>
<td>Cancelled</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>AGEL291</td>
<td>39163</td>
<td>Ground Skills/Training Tech</td>
<td>China Valley Agriculture</td>
<td>Cancelled</td>
<td>6</td>
<td>6</td>
<td>12</td>
</tr>
<tr>
<td>AGEL297</td>
<td>39164</td>
<td>Community Supported Agric</td>
<td>China Valley Agriculture</td>
<td>Cancelled</td>
<td>12</td>
<td>18</td>
<td>30</td>
</tr>
<tr>
<td>AGEL297</td>
<td>39165</td>
<td>Community Supported Agric</td>
<td>Yankton Valley</td>
<td>Cancelled</td>
<td>8</td>
<td>24</td>
<td>32</td>
</tr>
<tr>
<td>AGEL298</td>
<td>40381</td>
<td>Horticulture Science I</td>
<td>Yankton Valley</td>
<td>Cancelled</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>AGEL294</td>
<td>40401</td>
<td>Horticulture Science I</td>
<td>Yankton Valley</td>
<td>Cancelled</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>AGIL221</td>
<td>39800</td>
<td>Medical Terminol for Patient Care</td>
<td>Prescott</td>
<td>Cancelled</td>
<td>12</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>AGIL221</td>
<td>39800</td>
<td>Medical Terminol for Patient Care</td>
<td>Prescott</td>
<td>Cancelled</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ART1100</td>
<td>39153</td>
<td>Drawing I</td>
<td>Prescott</td>
<td>Cancelled</td>
<td>6</td>
<td>30</td>
<td>36</td>
</tr>
<tr>
<td>ART1100</td>
<td>39155</td>
<td>Drawing I</td>
<td>Prescott</td>
<td>Cancelled</td>
<td>7</td>
<td>35</td>
<td>42</td>
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<tr>
<td>ART1100</td>
<td>39156</td>
<td>Drawing I</td>
<td>Prescott</td>
<td>Cancelled</td>
<td>8</td>
<td>12</td>
<td>20</td>
</tr>
<tr>
<td>ART1100</td>
<td>39157</td>
<td>Drawing I</td>
<td>Prescott</td>
<td>Cancelled</td>
<td>4</td>
<td>6</td>
<td>10</td>
</tr>
</tbody>
</table>

Student Rights and Privacy of Records – Cognos reports are not to be shared with third parties.
Closing a Report

After reviewing your report, click on the return icon to close the report and return to the Cognos directory. **Do not** click on the “X” in the browser window to close a report.

Report Search

- Navigate to the top level of Public Folders
- In the Search Text Box, type “dashboard home page” and click the search icon or press Enter key

A list of possible reports or folders containing the report will be displayed. You can see the breadcrumb path of the report by hovering over the ...> icon. You can run the report from the search results screen by clicking on the report title.
The Enrollment Dashboard

A Dashboard report is a special link of Cognos report used for summarizing and analyzing data. It is created by combining several detail and summary reports. It is one of the most complex report types we have created at YC. The Enrollment Dashboard Home Page report compares enrollment statistics for the current term to the same term last year. The data is displayed in an easy to use and read interface and contains drill down capabilities. Each drill thru report opens in a new window, so you must close the window in order to exit that report. Only the main page has the return link to exit the report.

Yavapai College Enrollment Statistics

<table>
<thead>
<tr>
<th>Links To Breakouts</th>
<th>Spring 2015</th>
<th>Spring 2016</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>District</td>
<td>8,071</td>
<td>7,555</td>
<td>-516</td>
<td>-6.4%</td>
</tr>
<tr>
<td>Campus</td>
<td>56,880</td>
<td>52,264</td>
<td>-4,616</td>
<td>-8.1%</td>
</tr>
<tr>
<td>Avg. Carrying Load</td>
<td>7.0</td>
<td>6.9</td>
<td>-0.1</td>
<td>-1.8%</td>
</tr>
<tr>
<td>Student FTSE</td>
<td>3,792</td>
<td>3,484</td>
<td>-308</td>
<td>-8.1%</td>
</tr>
</tbody>
</table>

Change in FTSE Due to Change in Headcount

-242
-6.4%

Change in FTSE Due to Change in Carrying Load

-65
-1.7%

Total Semester Credits By Division

<table>
<thead>
<tr>
<th>Semester</th>
<th>201510</th>
<th>201610</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Humanities</td>
<td>7,248</td>
<td>6,596</td>
</tr>
<tr>
<td>Business, Ed. &amp; Social Science</td>
<td>14,613</td>
<td>15,011</td>
</tr>
<tr>
<td>Career &amp; Technical Education</td>
<td>3,630</td>
<td>3,978</td>
</tr>
<tr>
<td>Comp Tech &amp; Instruct Support</td>
<td>2,924</td>
<td>2,436</td>
</tr>
<tr>
<td>Foundation Studies</td>
<td>2,856</td>
<td>3,180</td>
</tr>
<tr>
<td>Science, Health, Public Safety</td>
<td>13,072</td>
<td>14,611</td>
</tr>
</tbody>
</table>

Report View of Enrollment Dashboard Home Page
Run Report with Options

Another method to running reports allows user to select delivery options and output format. Navigate to the folder Public Folders > TRAINING > 1. Cognos Basic Trng > Enrollment Reports. Click on the run with options icon under the Actions column for report “Report View of Universal Roster – V2”.

In the format menu, select Excel 2007 to display the report in an Excel spreadsheet. You can try other formats: (HTML (webpage), PDF, etc.

You can select several delivery options for receiving the report

- Click on the radio button next to send me the report by email
- Click the run button to run the report with your custom options
After entering the values on the prompt page, the report will run in the background. The report will show up in your mail box as an attachment to an email, with the report title in the subject line.
My Folders

My Folders can be used for creating report links to your favorite reports for quick and easy access. Report links are links or pointers to an existing entry report. If the source entry report is modified, your report link will contain the report changes.

If the source entry report is moved to another directory path or the report is deleted, your report link will be broken. Thus your report view will not run.

Creating a Report View in My Folders

1. Navigate to the source report’s location (in Public Folders>...)
2. Click the Report View icon under the actions column
3. Click on “Select My Folders” link
4. Click on Finish button
Creating a Shortcut in My Folders

1. Navigate to the source report’s location (in Public Folders>...)
2. Under the Actions column, click more... icon More...
3. The Action menu will appear. Select “Create a shortcut to this entry...”
4. Click on “Select My Folders” link
5. Click on Finish button

Report View versus Shortcut

Changes to report options cannot be made using a shortcut. If you wish to keep the existing options, use the shortcut. If you want to change the format, language, or delivery method of a report link or want to setup a schedule for running you report use a Report View.
Scheduling a Report

You can schedule your report view links to automatically run and email the report.

1. Navigate to report view link of Universal Roster – V2 you just created in My Folders
2. Click on the calendar icon under the Actions column
3. In the Schedule menu, configure your report to run on a recurring basis, at regularly scheduled days and times. Define the schedule in the Frequency section of the Schedule menu. Select “By Week”, day(s) of week, start Date and Time.
Continued

4. Click Override the default values in the Prompt Values section
5. Click Set... to bring up the pop-up prompt window to define and save prompt values
6. Click Finish (you will return to the Schedule menu)
7. Check “Send a link to the report by email”
8. Click Edit the options... to bring up the “Set the email options menu”
9. Type in email addresses in To: or CC: fields

10. Check the “Attach the Report” box

11. Click OK button to save the email delivery options and you will be returned to the Schedule menu page

12. After verifying your settings, click the OK button on the Schedule menu page

The report will run in the background, according to the scheduled day and time. The email subject line will contain: “Report: <report title>”. The report will be an email attachment.
Organizing My Folders

If you accumulate many reports over time in My Folders, you may want to consider organizing your reports into subfolders. For example, you may want to organize your reports by: reports run on schedule versus reports that are run manually.

Create a Subfolder

1. From the My Folders tab, click on the subfolders icon.

2. Enter a Name “Scheduled Reports” in the Name box:

3. Click Finish
Moving Reports to Subfolders

1. Navigate to the report to be moved to a subfolder
2. Click on the more… icon
3. Click on the Move… link
4. Select the radio button location subfolder where you wish to move your report
5. Click OK

Only move reports located from “My Folders” directory to your subfolders.
Renaming Reports

You may want to remove the report view prefix by renaming report. To do so:

1. Navigate to the report to be moved to a subfolder
2. Click on the set properties icon
3. Change the Name: box entry of Report View of Universal Roster – V2 to Universal Roster – V2
4. Click the OK button

Only rename reports located in your “My Folders” directory.