

Cognos Web Reports

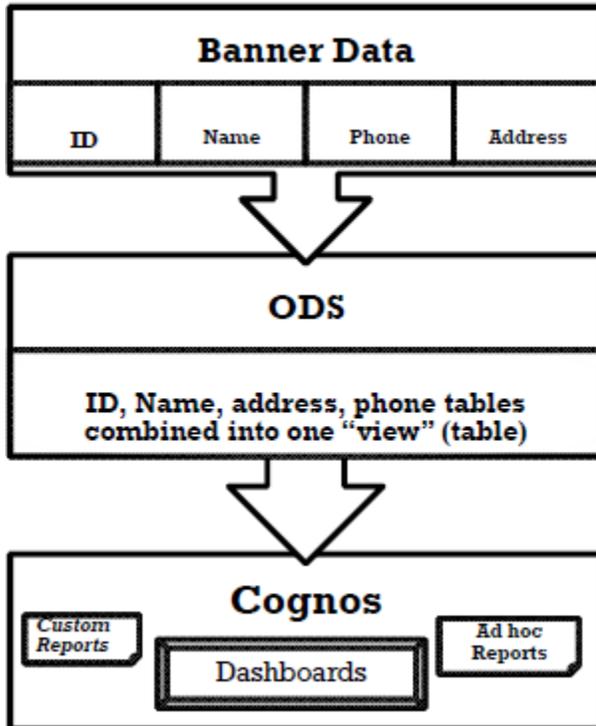


Training Manual

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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.

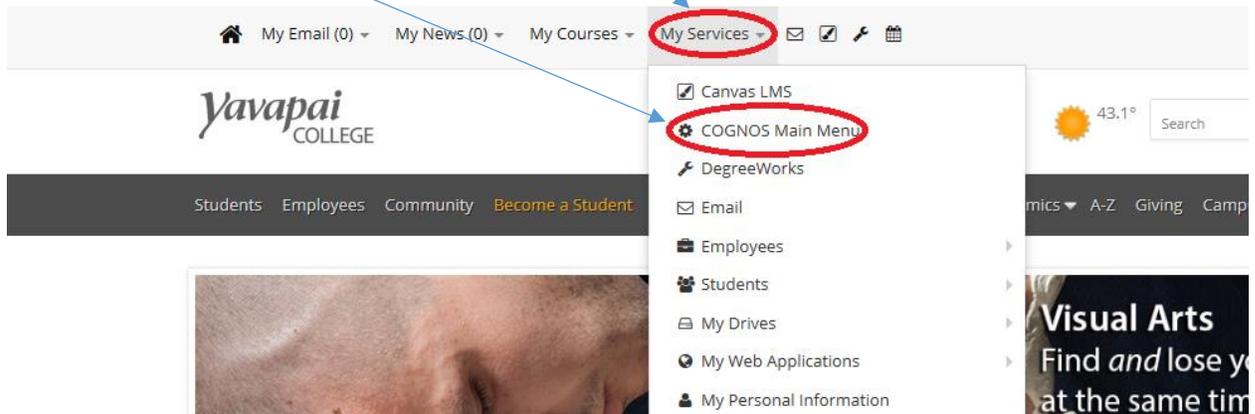
Since ODS contains Banner data which is used for Cognos reports, data integrity is critical for accurate reporting of information to the institution, state, and federal agencies.

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.



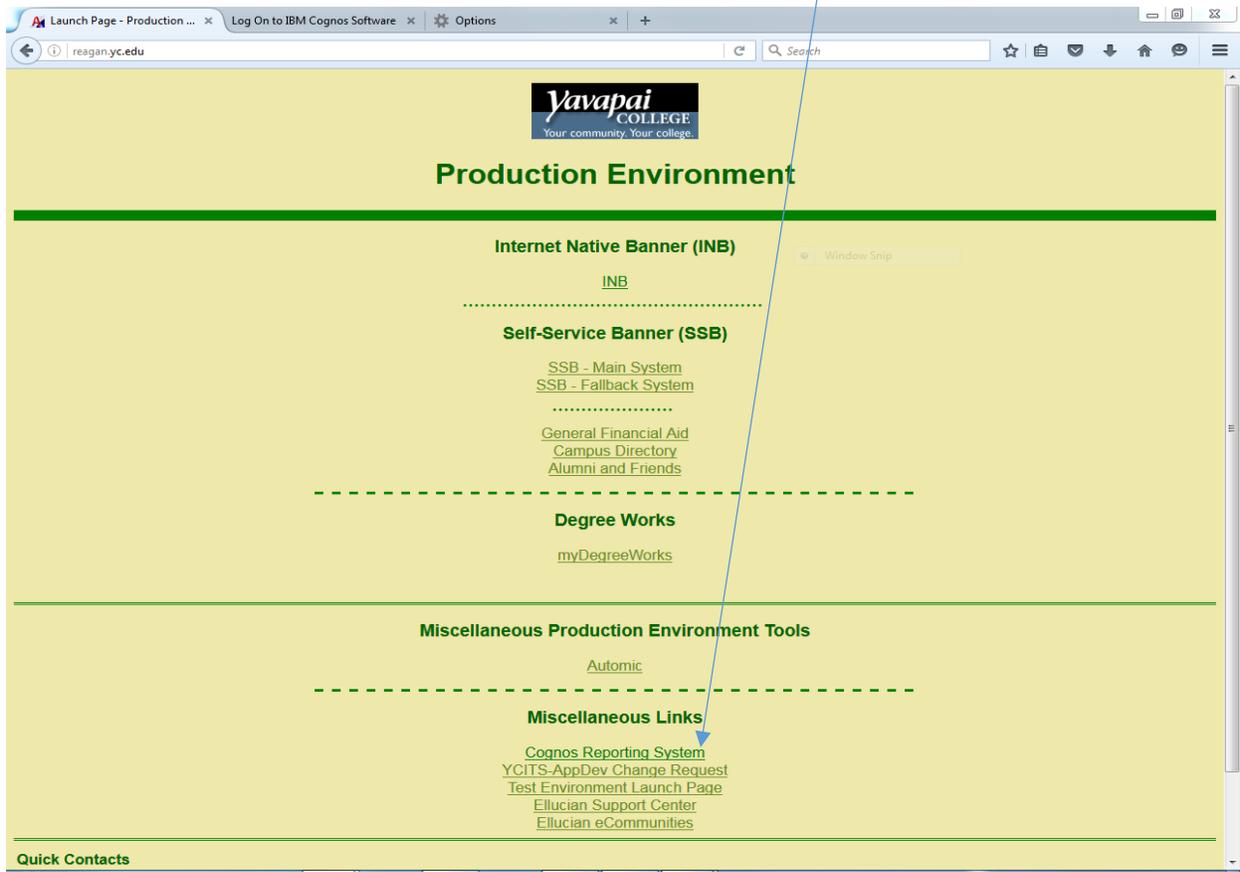
6. Click on My home to access Cognos reports.



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.

Log on [Help](#)

Please type your credentials for authentication.

Namespace:
YC.EDU

User ID:

Password:

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Need help with login credentials?

Contact YC Help Desk

Phone

- Prescott Campus
- Bldg 6
- Ext. 2168
- 928.776.2168

- Verde Valley Campus
- 928.649.5558

Email

- helpdesk@yc.edu

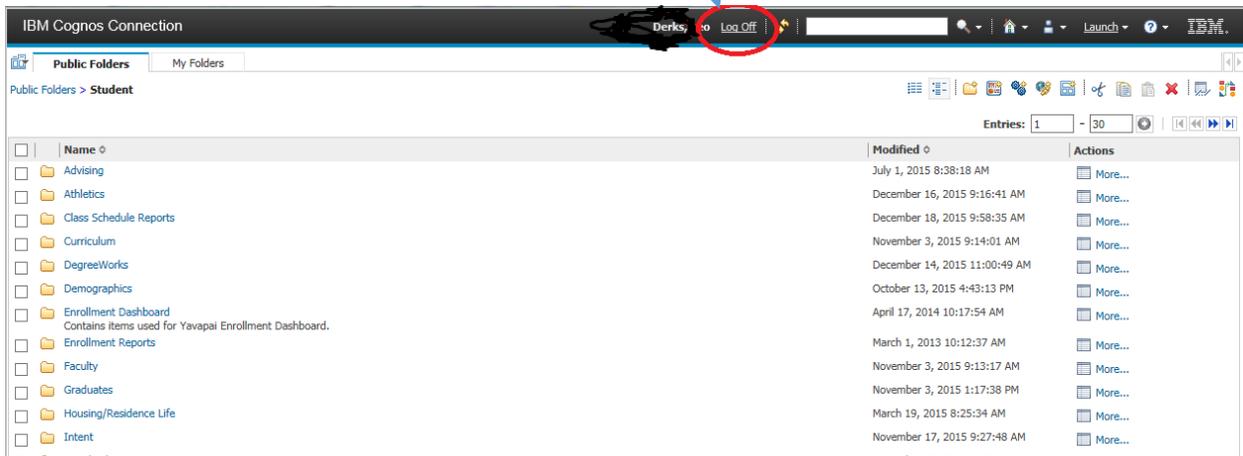
Internet

- 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

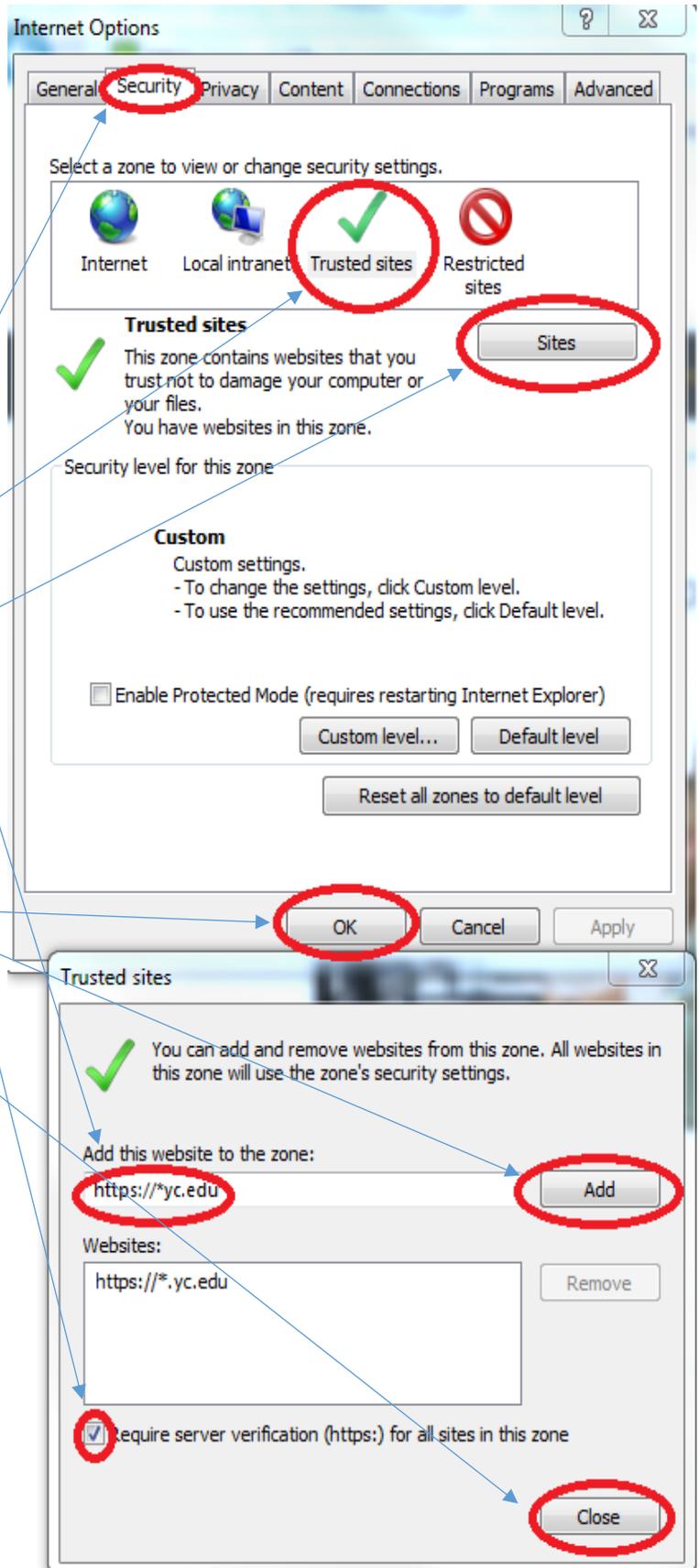
Sometimes Internet explorer requires you to hold down the CTRL key when running reports formatted for Excel to allow your report to display in a pop-up window

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

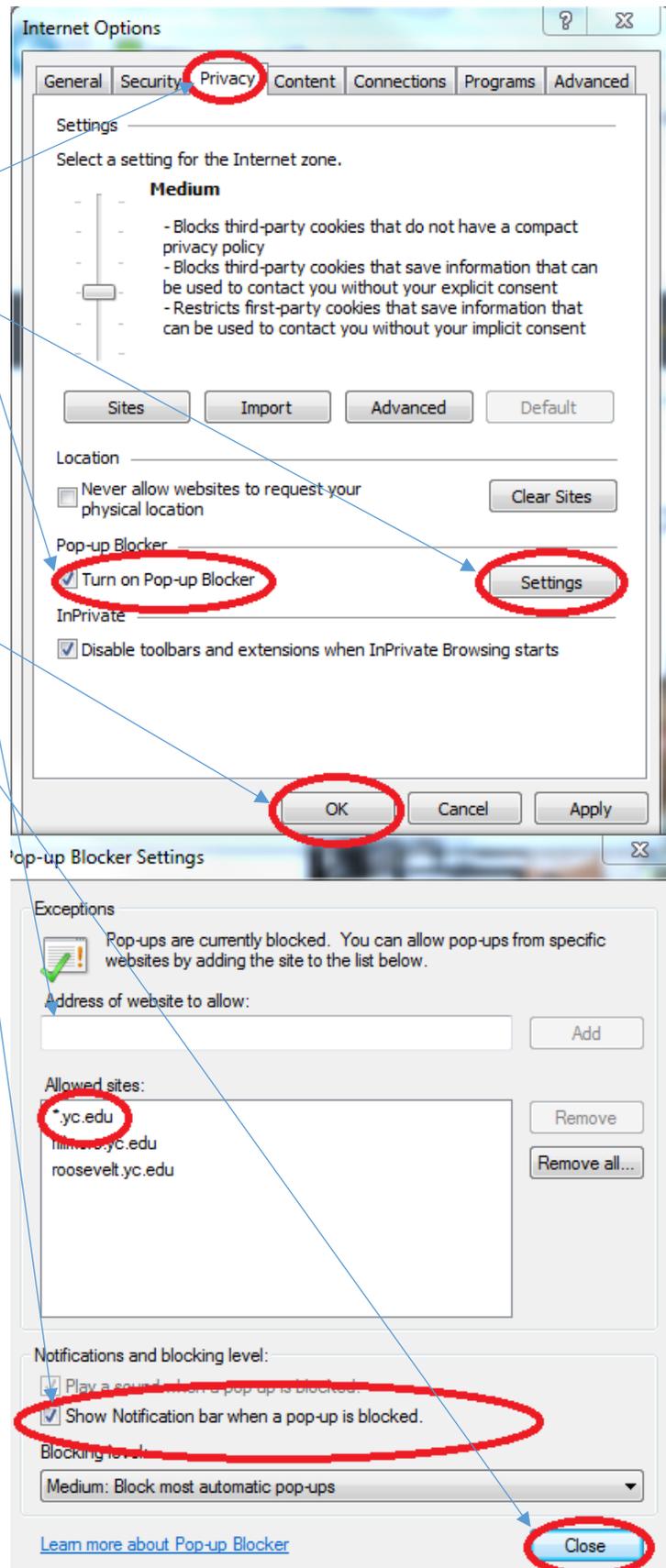
1. Click on the Tools Menu Gear icon
2. Select Internet options
3. Click on the Security tab
4. Select Trusted sites
5. Click on the "Sites" button
6. In "Add this website to the zone" field, type https://*.yc.edu
7. Uncheck "Require server verification (https) for all sites in this zone"
8. Click Add
9. Click Close
10. Click OK



Turn on Pop-up Blocker

Continued

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

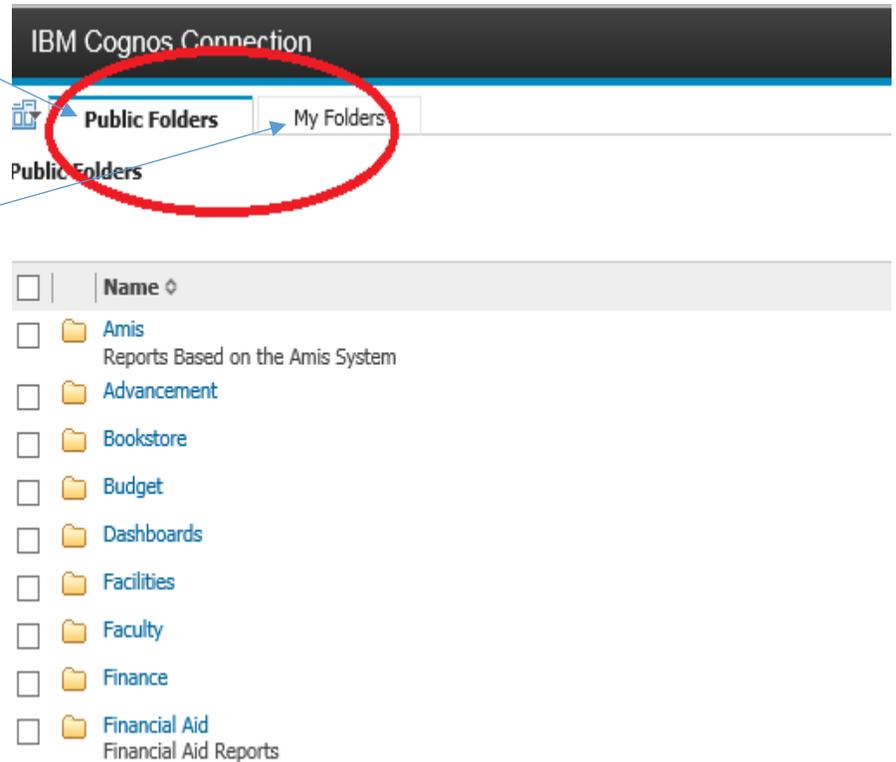
Two Tabs

- Public Folders

Contain YC's reports organized by departments into folders and subfolders

- My Folders

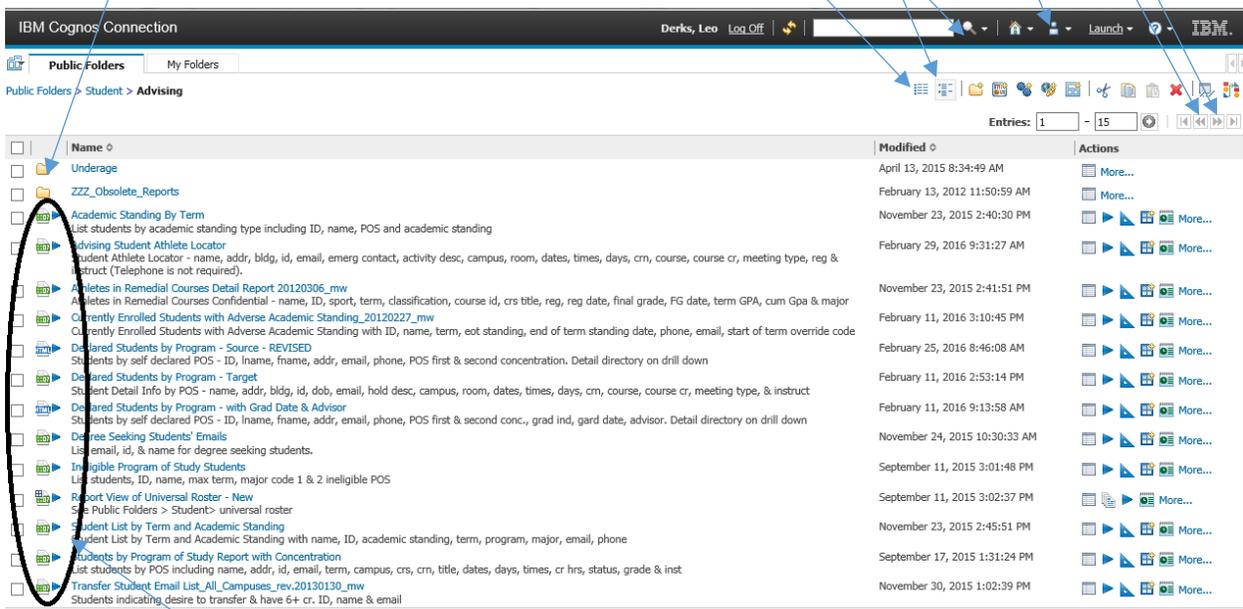
Contain your customized folders, Shortcuts to reports and report view links to reports



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



The screenshot shows the IBM Cognos Connection interface. The top navigation bar includes 'Public Folders' and 'My Folders'. Below it, the breadcrumb path is 'Public Folders > Student > Advising'. The main area is divided into two columns: a folder tree on the left and a list of reports on the right. The folder tree shows a folder named 'Underage' and a subfolder 'ZZZ_Obsolete_Reports'. Below these are several report icons, each with a small icon indicating its format (e.g., Excel, HTML, PDF). A red circle highlights these report icons. The report list on the right shows columns for 'Name', 'Modified', and 'Actions'. The 'Name' column contains various report titles, such as 'Academic Standing By Term' and 'Advising Student Athlete Locator'. The 'Modified' column shows dates and times. The 'Actions' column contains 'More...' links and icons for navigating between 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

Set preferences

General | Personal | Portal Tabs

Specify your settings.

Number of entries in list view:
30

Separators in list view:
No separator

Style:
Corporate [Preview](#)

Show hidden entries

Portal

Default view:
 List
 Details

Regional options

Product language:
 Use the default language
 Use the following language:
English

Time zone:
 Use the default time zone
 Use the following time zone:
(GMT-07:00) America, Phoenix

Enable bidirectional support

Base text direction for content:
Contextual

OK **Cancel**

Run & View Reports

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

Public Folders > Student > Class Schedule Reports

Name	Modified
Obsolete	June 6, 2013 11:27:37 AM
All Sections Open and Closed - With Summary By Discipline List divisions, crse, title, closed/open (crn), campus, PTRM, SCHD, instr, max & act enrl, seats avail, xlist, xl seats, meeting time, last add & fill rate by crse id	March 16, 2016 12:41:20 PM
All Sections Open and Closed-Summary By Discipline-Cross List Tabs List (non cross listed) divisions, crse, title, closed/open (crn), campus, PTRM, SCHD, instr, max & act enrl, seats avail, xlist, xl seats, meeting time, last add & fill rate by crse id	September 21, 2015 10:37:27 AM
Average Class Size and Class Capacity by Subject Class capacity by subject - crse number, crn, percent capacity, max & act enrl, division, 2nd report - summary by subject - # of sections, avg enrl, max & act enrl, percent capacity, & PTRM schedule	September 21, 2015 10:37:57 AM
Cancelled Courses Cancelled courses - Crse ID, crn, title, campus, status, lec hrs, lab hrs, total hrs	January 12, 2016 9:32:42 AM
Class Schedule Report - Excel with All Meeting Dates - No Headings V2 A COPY EXISTS per Jeni (email) to Public Folders > Student > Curriculum using same report name "Class Schedule Report - Excel with All Meeting Dates - No Headings". (2014-09-30) . Version 2 - fixed dual and JTED labels	January 29, 2016 2:13:49 PM
Class Schedule Report - Excel with All Meeting Dates - Revised By subject - crn, crse, title, sec, capacity, delivery, campus, division, min & max crs, min & max lec hrs, min & max lab hrs, days, time, start & end date, bldg, room, instr	March 17, 2016 9:20:04 AM
Course Schedule Workload Report Course Workload - subj, crse, title, low & high lec, low & high lab, schedule & workload	September 21, 2015 10:39:44 AM
Courses With Comments Courses with crs text - subj, crse #, section, title, crn, instr, crse text, text seq	September 21, 2015 10:40:02 AM
Students Email by Yid List Students Email by Yid List - lname & fname	November 23, 2015 2:57:04 PM

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

Academic Period:

- 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

Cancel < Back Next > **Finish**

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

IBM Cognos Viewer Derks, Leo | About IBM.

Cancelled Courses

Fall 2015

COURSE_IDENTIFICATION	COURSE_REFERENCE_NUMBER	TITLE_SHORT_DESC	CAMPUS_DESC	STATUS_DESC	LECTURE_CONTACT_HOURS	LAB_CONTACT_HOURS	TOTAL_CONTACT_HOURS
ACC132	39127	Principles of Accounting II	Prescott	Cancelled	3	0	3
ACC161	39128	Cmptr Acct w/ QuickBooks	Prescott	Cancelled	16	48	64
AGE122	39979	Prin of Equine Nutrition	Chino Valley Agribusiness	Cancelled	8	0	8
AGE125	39017	Equine Behavior and Psychology	Chino Valley Agribusiness	Cancelled	3	0	3
AGE125	39018	Equine Behavior and Psychology	Verde Valley	Cancelled	3	0	3
AGE260	39783	Ground Skills/Training Tech	Chino Valley Agribusiness	Cancelled	6	6	12
AGS157	39784	Community Supported Agric	Chino Valley Agribusiness	Cancelled	12	18	30
AGS157	39785	Community Supported Agric	Verde Valley	Cancelled			
AGS250	40281	Horticulture Science I	Verde Valley	Cancelled	8	24	32
AGS250	40422	Horticulture Science I	Verde Valley	Cancelled			
AHS130	39800	Medical Term for Patient Care	Prescott	Cancelled			
AHS296	39821	Internship: Medical Coding	Prescott	Cancelled			
AHS296	39822	Internship: Phlebotomy	Prescott	Cancelled	0	0	3
AHS296	39824	Internship: Phlebotomy	Prescott	Cancelled			
AJS240	40132	The Correction Function	Prescott	Cancelled	12	0	12
ART110	39573	Drawing I	Prescott	Cancelled	6	30	36
ART110	39575	Drawing I	Prescott	Cancelled	7	35	42
ART111	40361	Drawing II	Prescott	Cancelled			
ART137	39147	Adobe Photoshop I	Prescott	Cancelled	8	12	20
ART137	40282	Adobe Photoshop I	Verde Valley	Cancelled	4	6	10

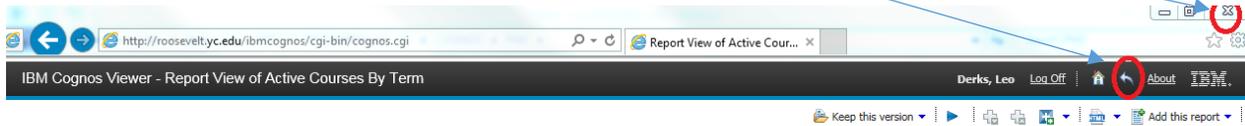
Mar 21, 2016 1 3:31:21 PM

Top Page up Page down Bottom

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.



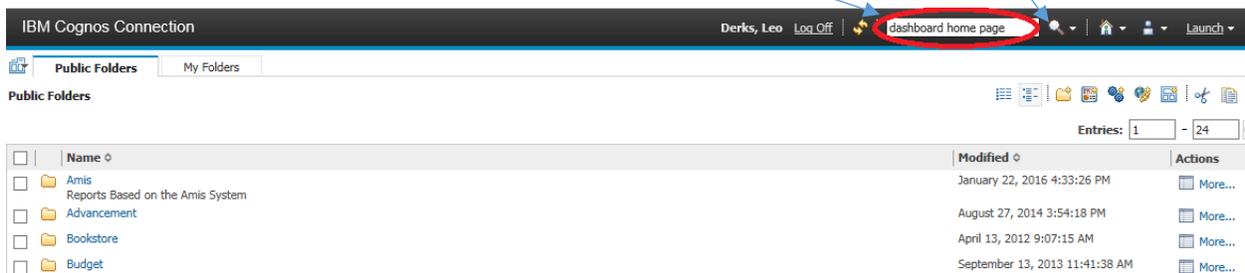
Active Courses by Effective Term

Eff Term Code: 201610 - Spring 2016

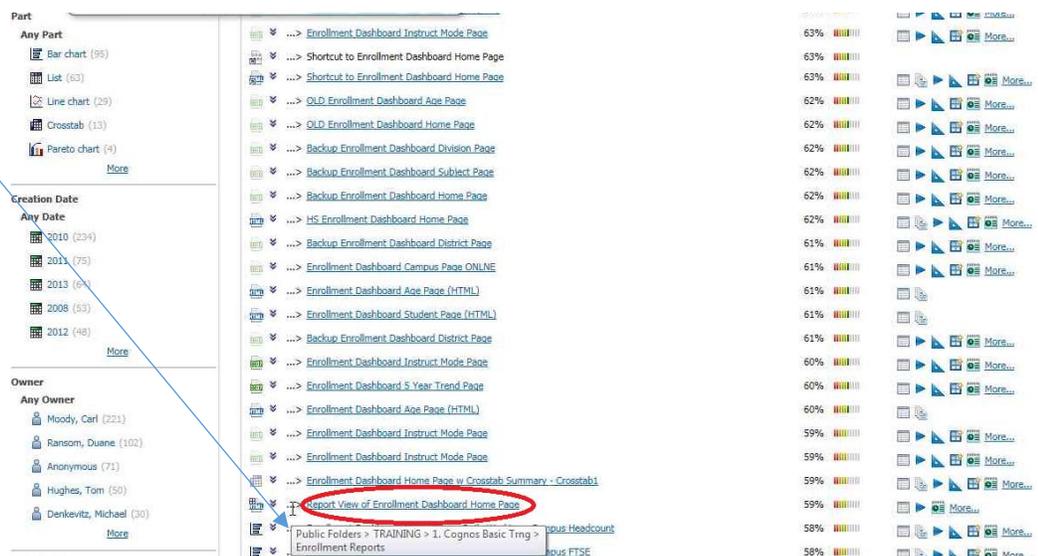
Subject	Course Number	SUN#	Course Title	Effective Term	Divs Code	Credits Low	Credits High	Attribute	Lec High	Lec Low	Lab High	Lab Low	Rep Code	Rep Limit	Max Rep Units	Divs Code	SCBCRSE_CONT_HR_LOW
ACC	115		Basic Tax Planning	201530	BESS	3.0	3.0				3.0	0.0				BESS	3

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

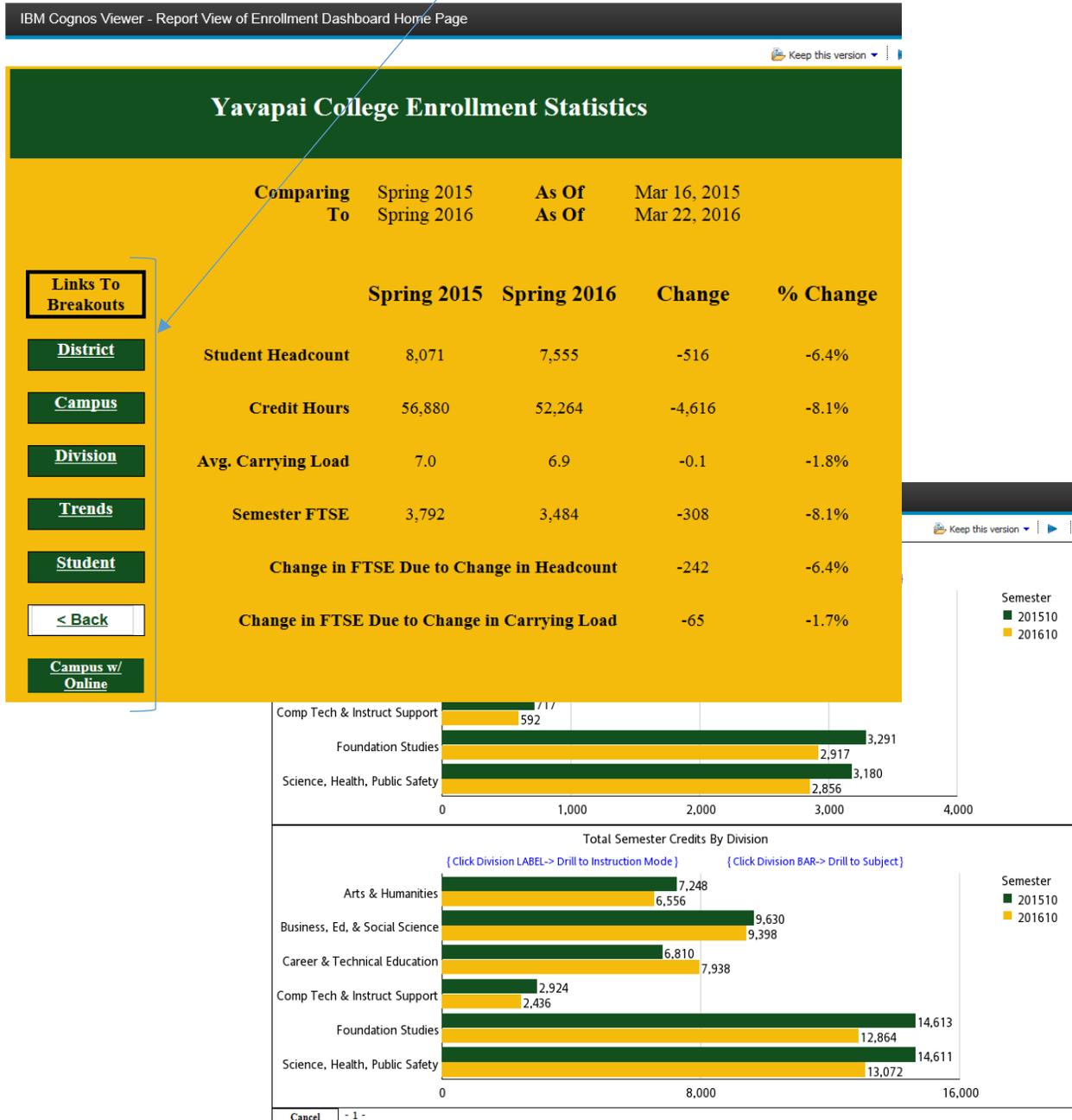


A list of possible reports or folders containing the report will be displayed. You can see the breadcrumb path of the report by hovering over the ...> icon. You can run the report from the search results screen by clicking on the report title.



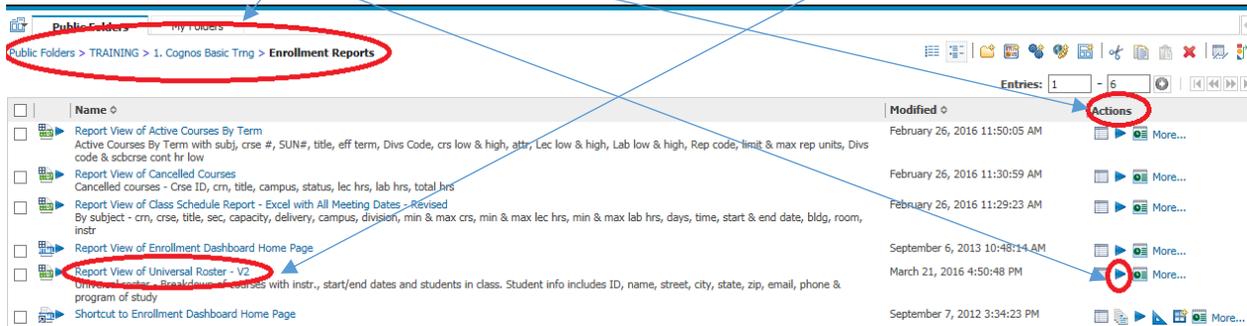
The Enrollment Dashboard

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.

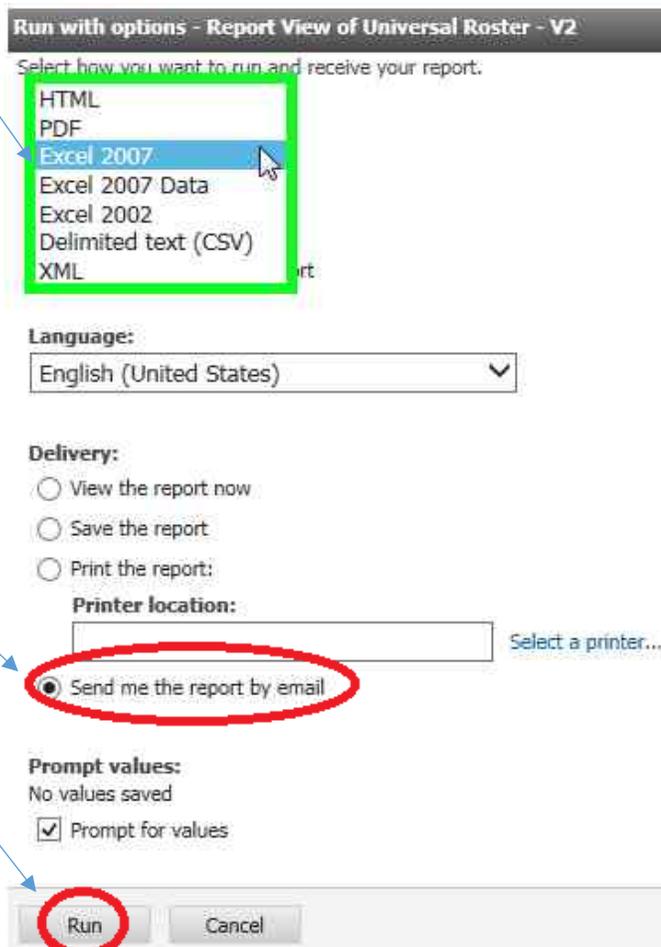


Run Report with Options

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.



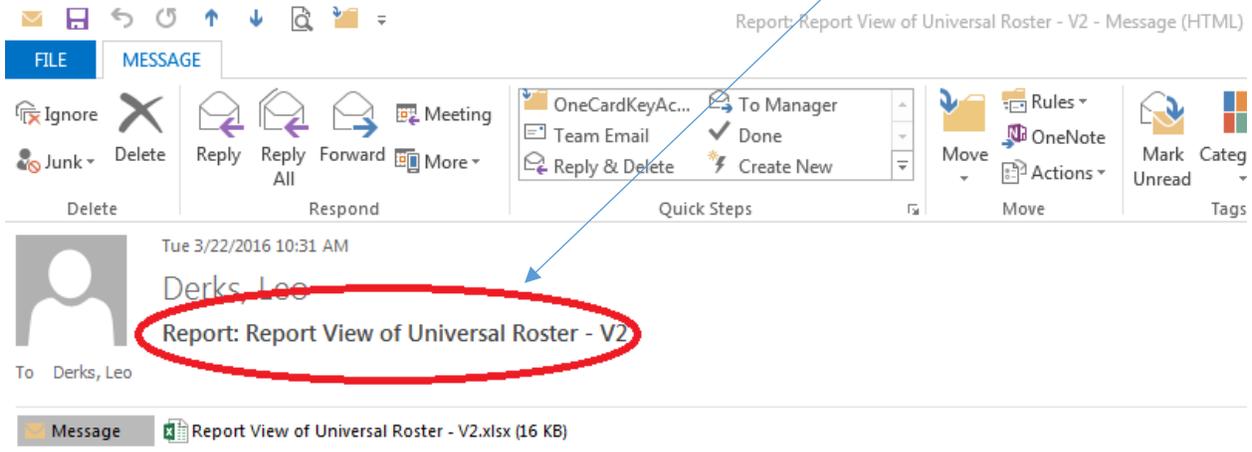
You can select several delivery options for receiving the report

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

Continued

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, you 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

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:
Report View of Universal Roster - V2

Description:
Universal roster - Breakdown of courses with instr., start/end dates and students in class. Student info includes ID, name, street, city, state, zip, email, phone & program of study

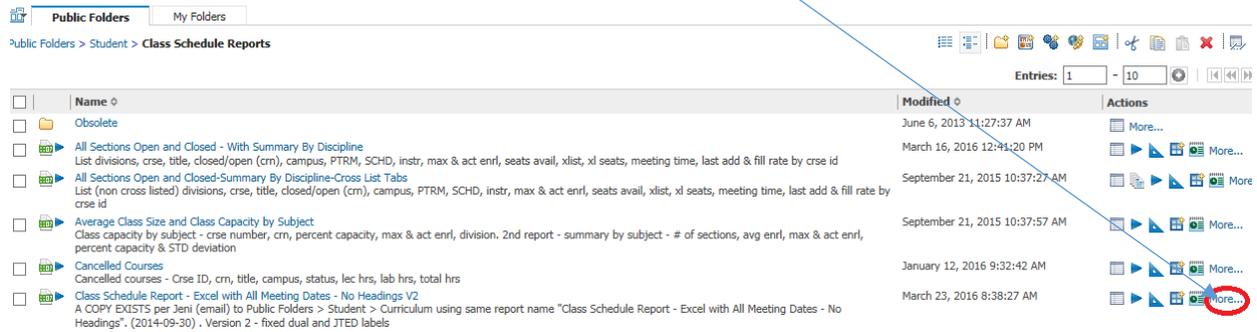
Screen tip:
[Empty text box]

Location:
Public Folders > Student > Universal Roster
Select another location... [select My Folders](#)

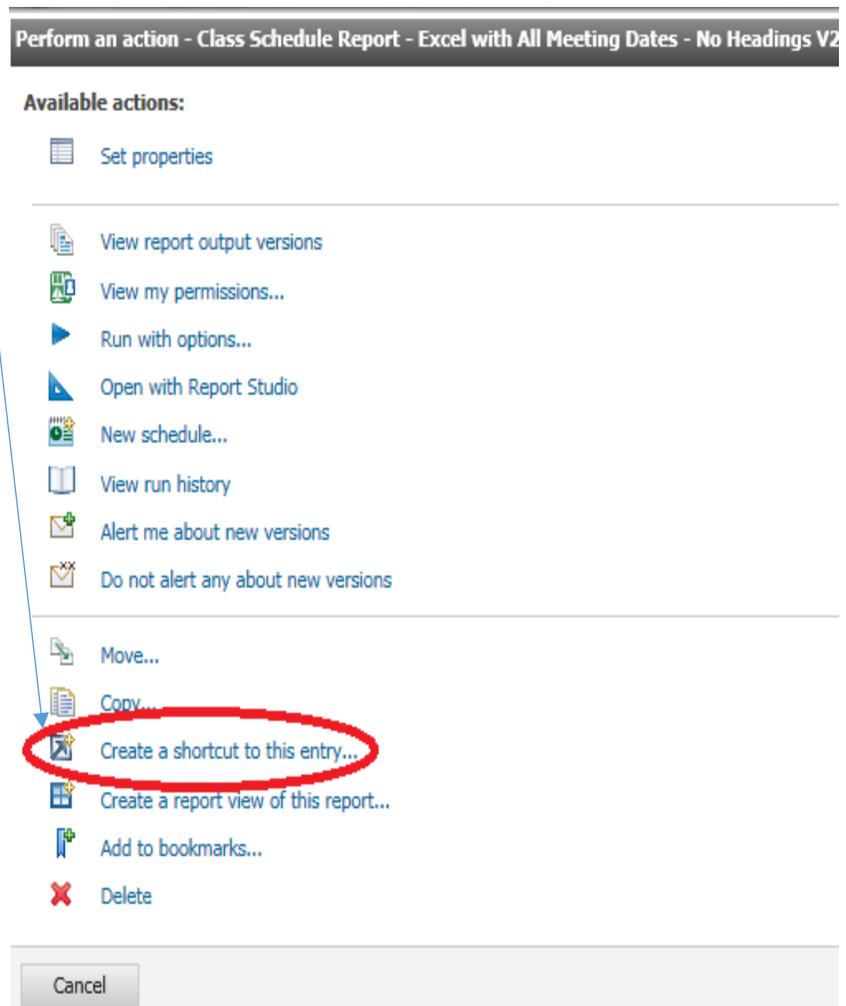
Cancel < Back Next > **Finish**

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..."



Continued

4. Click on “Select My Folders” link
5. Click on Finish button

Specify a name and description - New Shortcut wizard
Specify a name and location for this entry. You can also specify a description and screen tip.

Name:
Shortcut to Class Schedule Report - Excel with All Meeting Dates - No

Description:

Screen tip:

Location:
Public Folders > Student > Class Schedule Reports
Select another location... **Select My Folders**

Cancel < Back Next > **Finish**

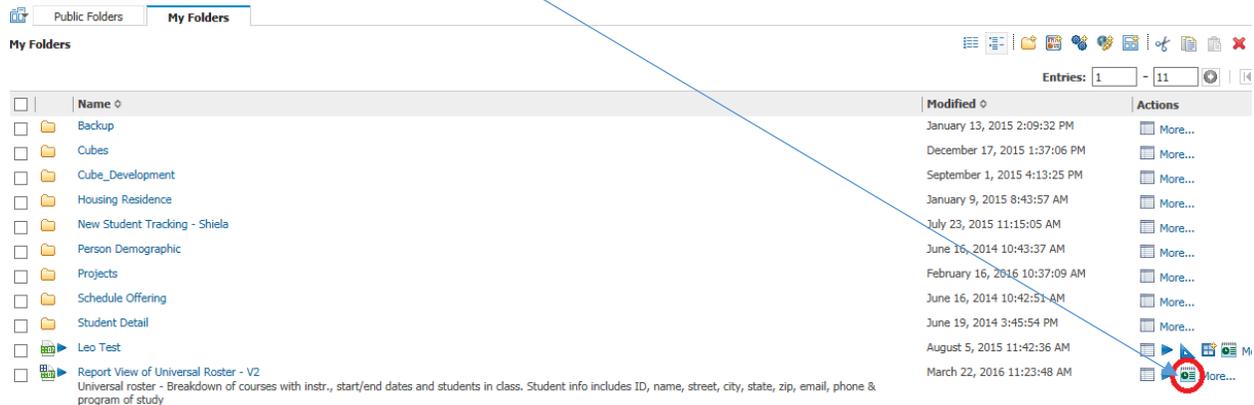
Report View versus Shortcut

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.

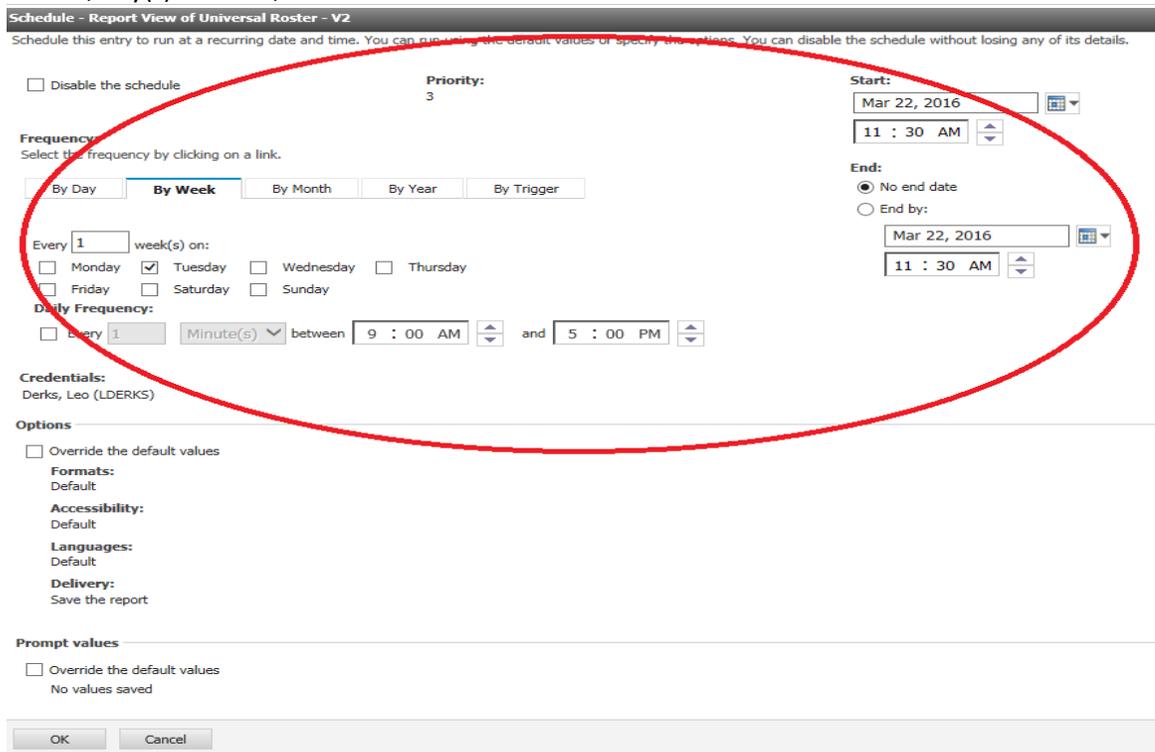
Scheduling a Report

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.



The screenshot shows the 'Schedule - Report View of Universal Roster - V2' dialog box. A red oval highlights the 'Frequency' section, which is configured for a weekly schedule on Tuesdays at 11:30 AM. The 'Start' date is set to Mar 22, 2016, and the 'End' date is set to Mar 22, 2016. The 'Priority' is set to 3. The 'Options' section is also visible, with 'Override the default values' checked.

Schedule - Report View of Universal Roster - V2
Schedule this entry to run at a recurring date and time. You can run using the default values or specify the options. You can disable the schedule without losing any of its details.

Disable the schedule

Priority: 3

Start: Mar 22, 2016
11 : 30 AM

End: No end date
 End by: Mar 22, 2016
11 : 30 AM

Frequency:
Select the frequency by clicking on a link.

By Day **By Week** By Month By Year By Trigger

Every 1 week(s) on:
 Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Daily Frequency:
 Every 1 Minute(s) between 9 : 00 AM and 5 : 00 PM

Credentials:
Derks, Leo (LDERKS)

Options

Override the default values

Formats:
Default

Accessibility:
Default

Languages:
Default

Delivery:
Save the report

Prompt values

Override the default values
No values saved

OK Cancel

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)

Frequency:
Select the frequency by clicking on a link.

By Day **By Week** By Month By Year By Trigger

Every week(s) on:

Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Daily Frequency:
 Every Minute(s) between and

Credentials:
Derks, Leo (LDERKS)

Options

Override the default values

Formats:
 HTML
Number of rows per Web page:
 Enable selection-based interactivity
 PDF
No options saved
Set...
 Excel 2007
 Excel 2007 Data
 Excel 2002
 Delimited text (CSV)
 XML

Accessibility:
 Enable accessibility support

Languages:
English (United States) [Select the languages...](#)

Prompt values

Override the default values
No values saved
Set...

Delivery:
Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.
 Save the report
 Print the report
Printer location: [Select a printer...](#)
 Send a link to the report by email
Derks, Leo (LDERKS) [Edit the options...](#)

OK Cancel

7. Check "Send a link to the report by email"
8. Click Edit the options... to bring up the "Set the email options menu"

Continued

9. Type in email addresses in To: or CC: fields

Set the email options - Report View of Universal Roster - V2 Help

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To:

CC:

[Select the recipients...](#) [Show Bcc](#)

Subject:

Body: [Change to plain text >>](#)

Include a link to the report

Attach the report

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

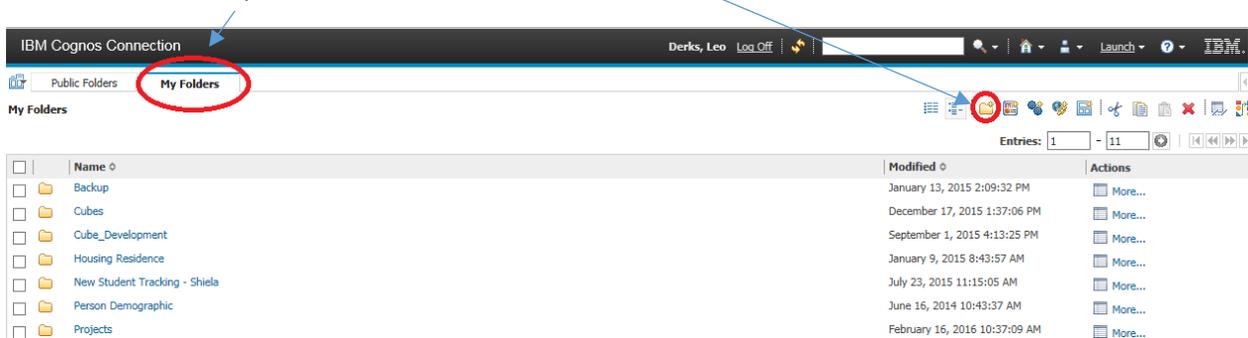
The report will run in the background, according to the scheduled day and time. The email subject line will contain: “Report: **<report title>**”. The report will be an email attachment.

Organizing My Folders

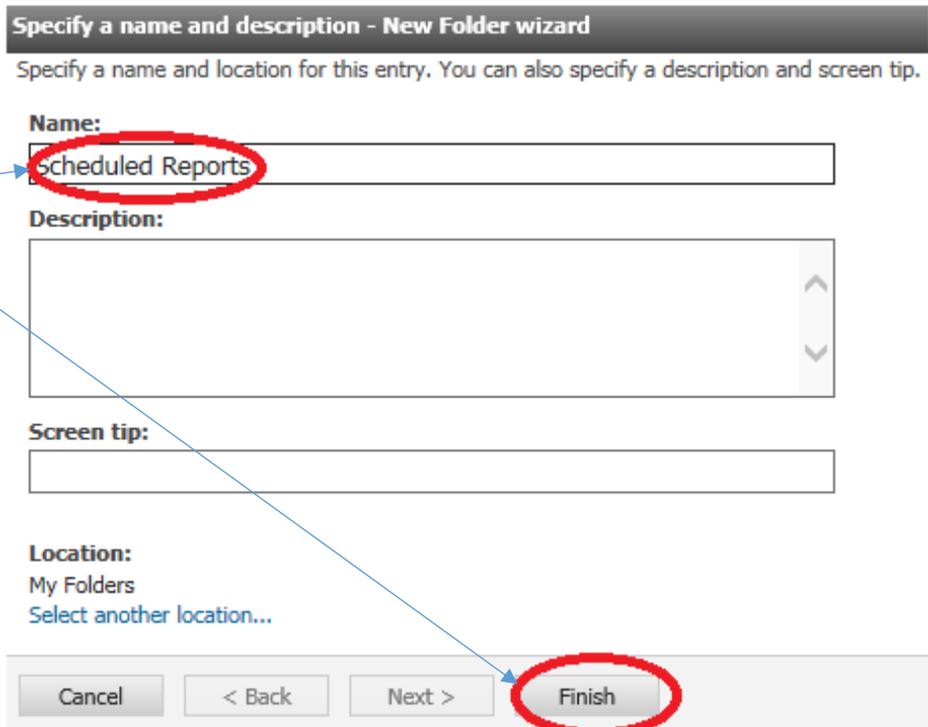
If you accumulate many reports over time in My Folders, you may want to consider organizing your reports into subfolders. For example, you may want to organize your reports by: reports run on schedule versus reports that are run manually.

Create a Subfolder

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



2. Enter a Name "Scheduled Reports" in the Name box:



The screenshot shows the 'Specify a name and description - New Folder wizard' dialog box. The 'Name' field contains 'Scheduled Reports' and is circled in red. A blue arrow points from the instruction 'Enter a Name "Scheduled Reports" in the Name box:' to this field. The 'Description' field is empty. The 'Screen tip' field is empty. The 'Location' is set to 'My Folders'. The 'Finish' button is circled in red. A blue arrow points from the instruction 'Click Finish' to this button.

Specify a name and description - New Folder wizard
Specify a name and location for this entry. You can also specify a description and screen tip.

Name:
Scheduled Reports

Description:

Screen tip:

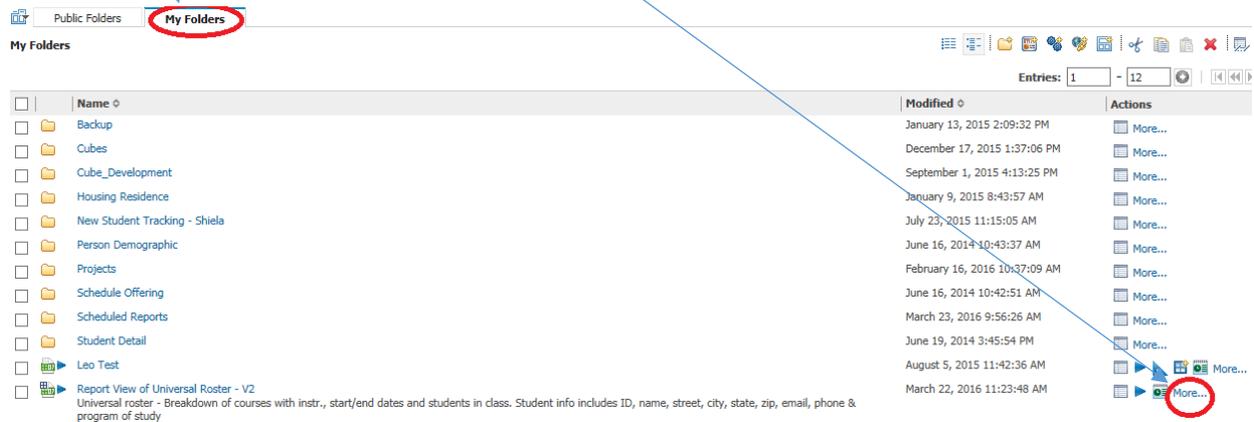
Location:
My Folders
[Select another location...](#)

Cancel < Back Next > Finish

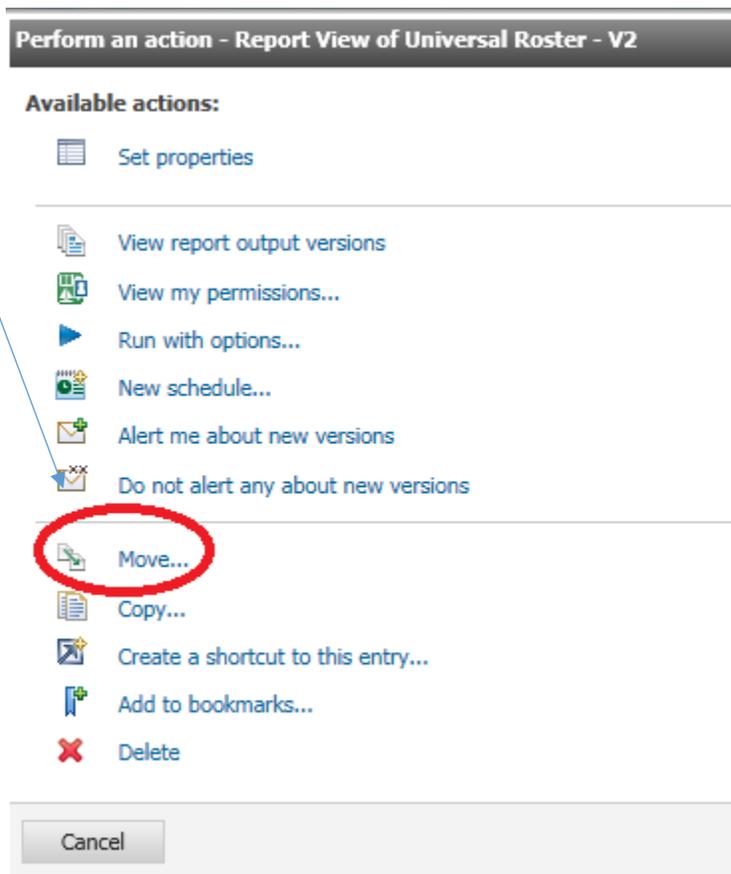
3. Click Finish

Moving Reports to Subfolders

1. Navigate to the report to be moved to a subfolder
2. Click on the more... icon [More...](#)

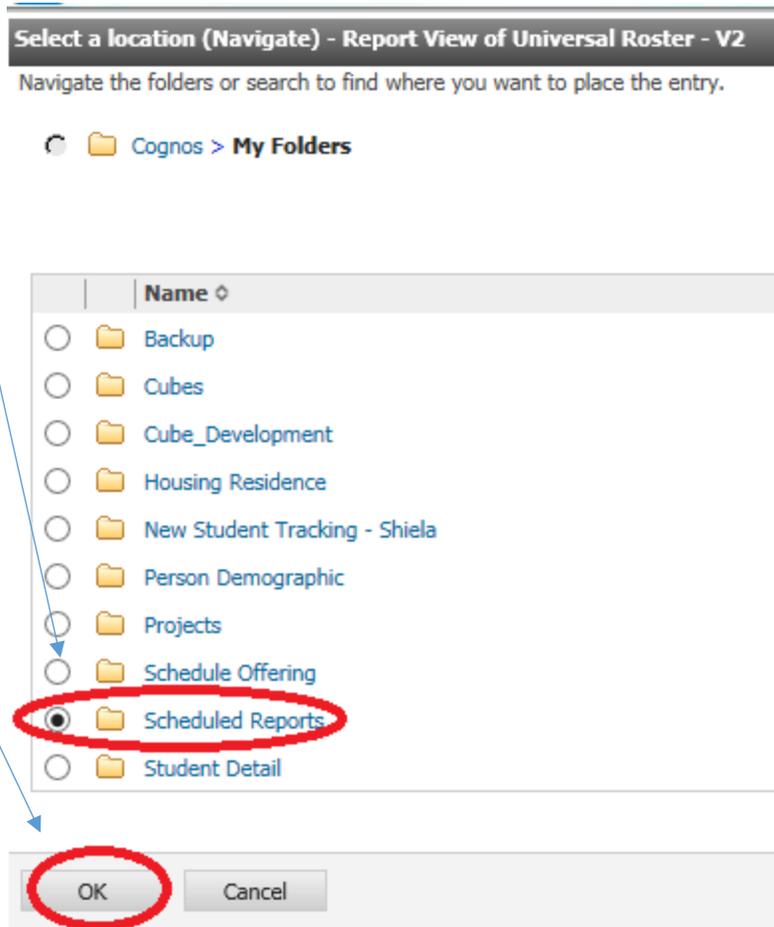


3. Click on the Move... link



Continued

4. Select the radio button location subfolder where you wish to move your report
5. Click OK

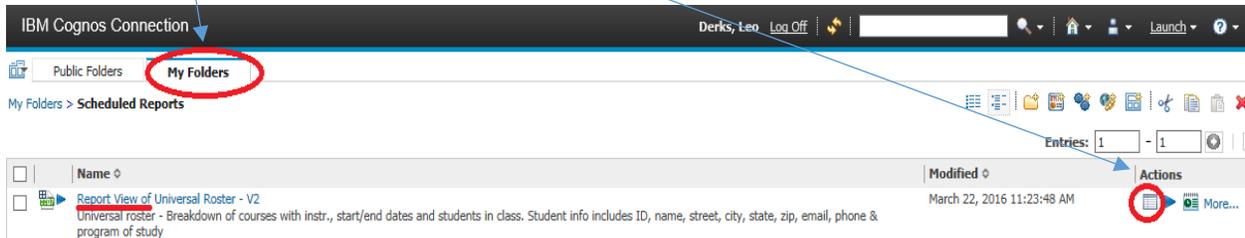


Only move reports located from "My Folders" directory to your subfolders.

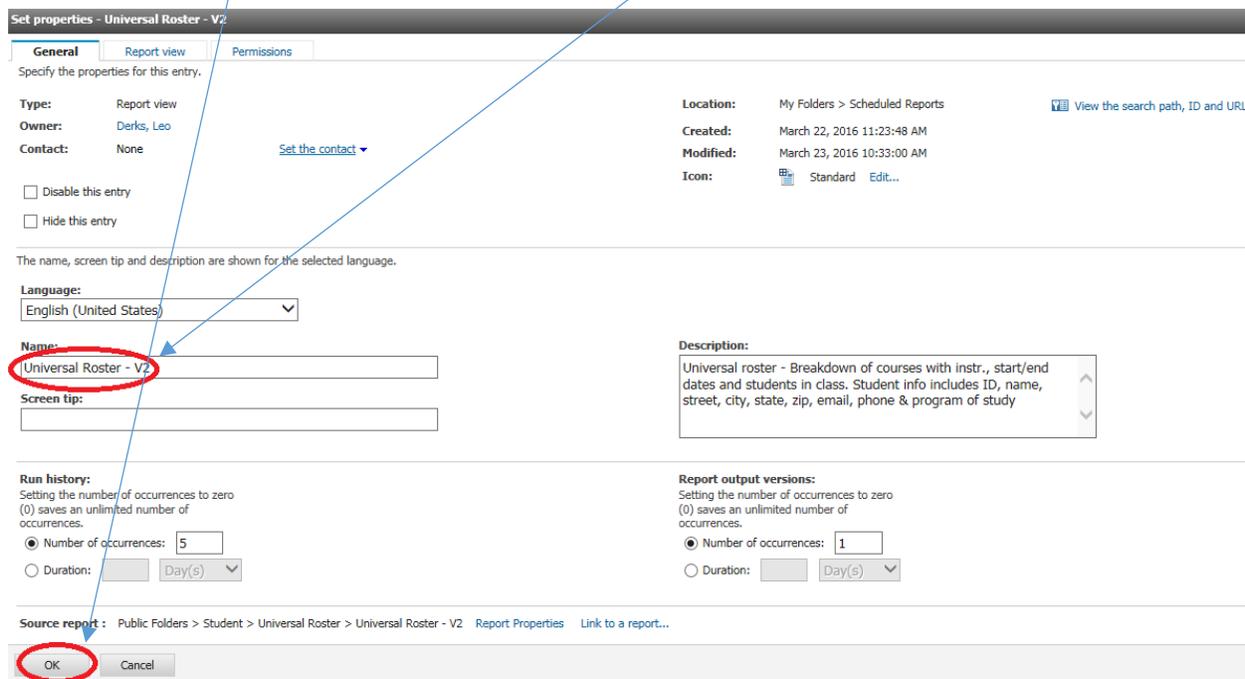
Renaming Reports

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.