

# Cognos Analytics

**A GUIDE FOR REPORT USERS**

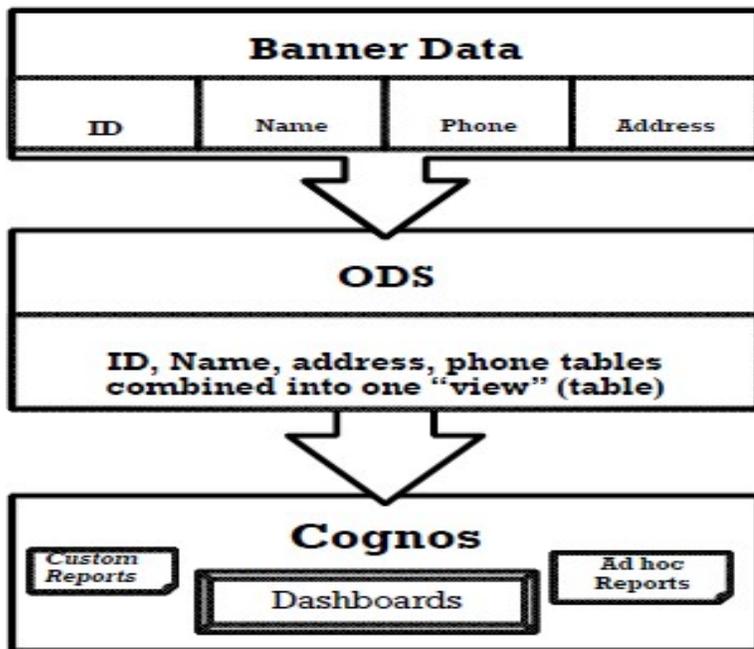
LEO DERKS

YAVAPAI COLLEGE

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## Cognos, Banner & 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.

- Cognos reports extracted from Banner tables contain real-time data
- Cognos reports extracted from ODS contain data current as of the close of business the day before
- Cognos Analytics is a web-based reporting solution that allows data consumers to create and run reports
- Cognos Analytics can work with any of the following browsers (see below for detailed chart):
  - ❖ Internet Explorer
  - ❖ Firefox
  - ❖ Chrome
  - ❖ Safari
- Microsoft Edge is NOT a supported web browser

Supported Software	Version	Prerequisite Minimum
Apple Safari	9 and future fix packs	9
Apple Safari on iOS	10.x and future fix packs	10.x
Google Chrome	(latest release) and future fix packs	(latest release)
Microsoft Internet Explorer	11 and future fix packs	11
Mozilla Firefox ESR	52 and future fix packs	52

## Introduction

Yavapai College has recently upgraded to the latest release of IBM's Cognos BI tool, (Cognos 11), which offers a completely redesigned user interface.

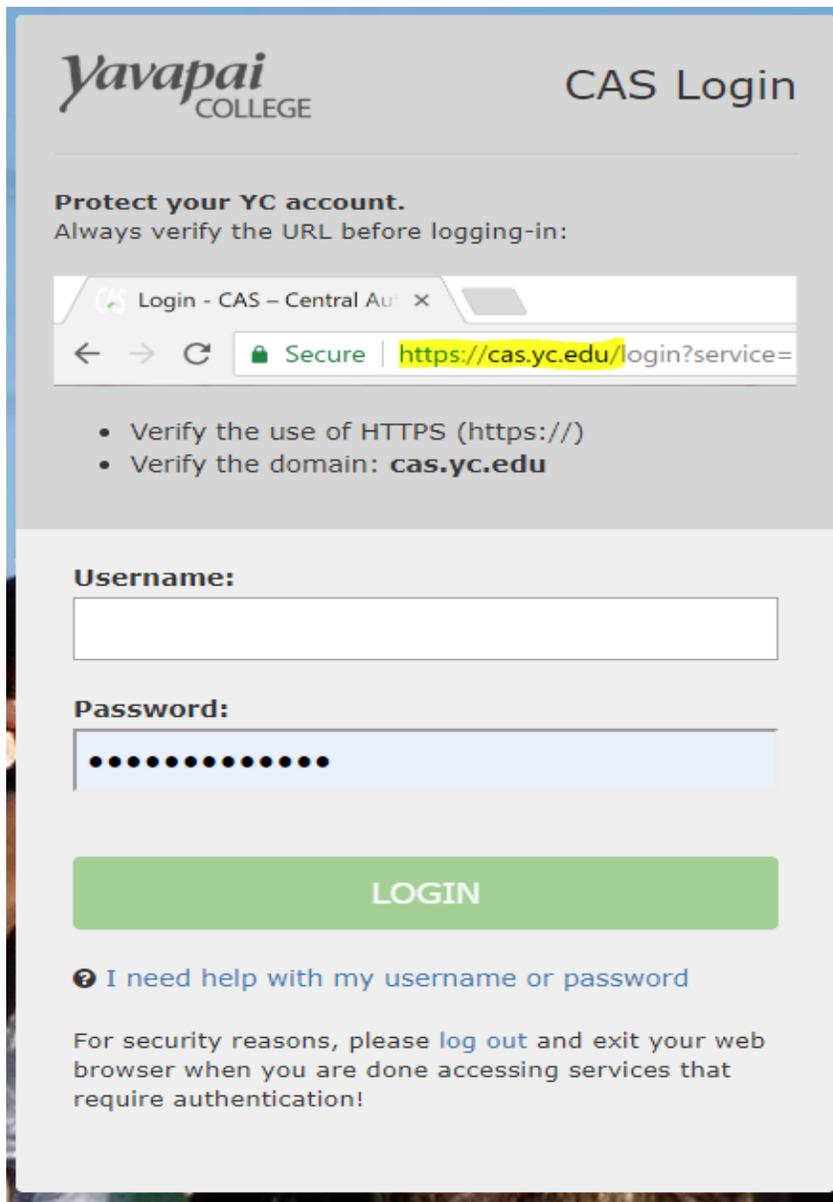
## Changes to the User Interface

- The new interface replaces Cognos Connection, Report Studio, Query Studio, and Workspace Advanced
- My Folders and Public Folders have been renamed to My content and Team content respectively
- Improved search functionality
- Many of the action icons in the previous versions of Cognos have been replaced with the actions button ...

# Yavapai College Website & Login

The url to Yavapai College is <https://www.yc.edu/>

To log into Cognos enter your userid and password.



## Need help with login credentials?

Contact YC Help Desk

Phone

Prescott Campus            928.776.2168  
Verde Valley Campus       928.649.5558

Email

[helpdesk@yc.edu](mailto:helpdesk@yc.edu)

# Add Cognos Reports to your shortcut

**Yavapai COLLEGE** Good Morning  
Tuesday, January 14, 2020 Search Website / myYC...

**Leo Derks**  
[You have 0 account notices](#)

Y#: [Show](#)  
Balance Due: [Show](#)  
Flexicash: [Show](#)  
Dark Mode: [Off](#)

Roughrider Scheduler	Register for Classes	Payment Center	My Email
Canvas	Cognos Reports	IER Dashboard	My Pay Information
My Timesheet	Summer Course Request	Mobile Registration	Access Management

[+ Add/Remove Shortcut](#)



My Courses	My Account	Office 365 / Drives	Students
Academics	Employees	Applications	Library
Need Help	V.E.T. Services		

## Additional Way to Enter Cognos

In addition to logging in via the YC website, users may access Cognos using the following url: <https://prodjs.yc.edu>. Click on the Cognos Reporting System link and enter your same login credentials as he YC website.



# Production Environment

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## Admin Pages (Banner 9)

[Admin Pages](#)

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## Self-Service Banner (SSB)

[SSB](#)  
[SSB - ITS](#)

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[General Financial Aid](#)  
[Campus Directory](#)  
[Alumni and Friends](#)

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## Degree Works

[myDegreeWorks](#)  
[DegreeWorks - Admin](#)

## Miscellaneous Production Environment Tools

[APEX Development](#)  
[APEX Administration](#)  
[Automic](#)

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## Miscellaneous Links

[Cognos Reporting System](#)  
[YCHS AppDev Change Request](#)  
[ODS Metadata](#)  
[ODS Schedule](#)  
[Test Environment Launch Page](#)  
[Ellucian Support Center](#)  
[Ellucian eCommunities](#)

# The Welcome Page

With the new release comes a new Welcome Page. From this page users can navigate to reports, run reports, searching for content, view content, open dashboards, stories and other items, upload files, check your notifications, set your preferences and home page, and review your subscriptions. The welcome page also displays the most recent reports the user has opened.

The screenshot shows the IBM Cognos Analytics interface. The top navigation bar includes the IBM Cognos Analytics logo, a 'Welcome' dropdown, and a 'More Button' (three dots) which is annotated with a box. To the right of the 'More Button' are icons for Notifications, Personal Menu, and Cognos Help, each also annotated with a box. The left sidebar contains navigation options: Home, Search, My content, Team content, Recent, Manage, and New, with 'New' annotated with a box. The main content area features a 'Welcome to IBM Cognos Analytics' message and a 'Recent' section displaying six report cards. The first report card, 'Declared Student Date & Advisor', has a 'More Options' button annotated with a box. Below the reports is a dashed box icon with the text 'Drag and drop files, open Quick launch or Browse'. On the right, a 'Quick reference' section lists 'Get started', 'Overview', 'Get started videos', 'Sample data', and 'Support'.

## Recent

The recent section of the welcome page shows the recent reports you have viewed. If you wish to see more recently used objects than what is listed, click the **Show More** link. Clicking the **More** Button allows you to take additional actions.

### Recent

 [Show more...](#)

 REPORT

Declared Studen...Date & Advisor

1/14/2020, 9:46 AM  ...

 REPORT

Enrollment Persi...y Drill Through

1/14/2020, 9:35 AM ...

 REPORT

Enrollment Das...ard Home Page

12/19/2019, 12:03 PM ...

 REPORT

High School Non-Passing Grades

12/12/2019, 1:31 PM ...

 REPORT

Financial Aid Award Detail Report

12/12/2019, 11:41 AM ...

 REPORT

Admitted Students by Term

12/12/2019, 11:39 AM ...

## My Content & Team Content

As mentioned earlier My Content has replaced My Folders and Team Content has replaced Public Folders.

The screenshot shows a navigation menu on the left with four options: Home (house icon), Search (magnifying glass icon), My content (person icon), Team content (two people icon), and Recent (checkmark icon). The 'Team content' option is highlighted with a blue bar and a red circle. To the right, the breadcrumb path is 'Team content > Student'. Below this, there is a list of folders with their names and creation dates: Admissions (12/14/2018 1:39 PM), Advising (7/10/2017 1:58 PM), Allied Health (9/7/2017 10:39 AM), Assessment (11/17/2015 3:09 PM), Athletics (10/2/2018 11:10 AM), and Class Schedule Reports (8/8/2019 4:26 PM). At the top right of the folder list, there are icons for adding (+), filtering (funnel), and sorting (up/down arrows).

	<p><b>My content</b> provides direct access to any content you have saved. It cannot be accessed by anyone else. Once reports have been saved to this area, you can modify and personalize them. You also have the ability to create additional folders to the directory. You have the ability to copy reports from Team Content folders and save them (or report views) to your My Content folders.</p>
	<p><b>Team Content</b> contains production Cognos reports which you have access to. You cannot modify or personalize reports in these folders.</p>
	<p>Folders store your Cognos reports just as the previous version of Cognos.</p>

## Recent Items

The Recent Items area on the Left Navigation menu shows recently used content up to the last 20 items. Click on a report name to run it or click on the **More** button ... to perform an action.

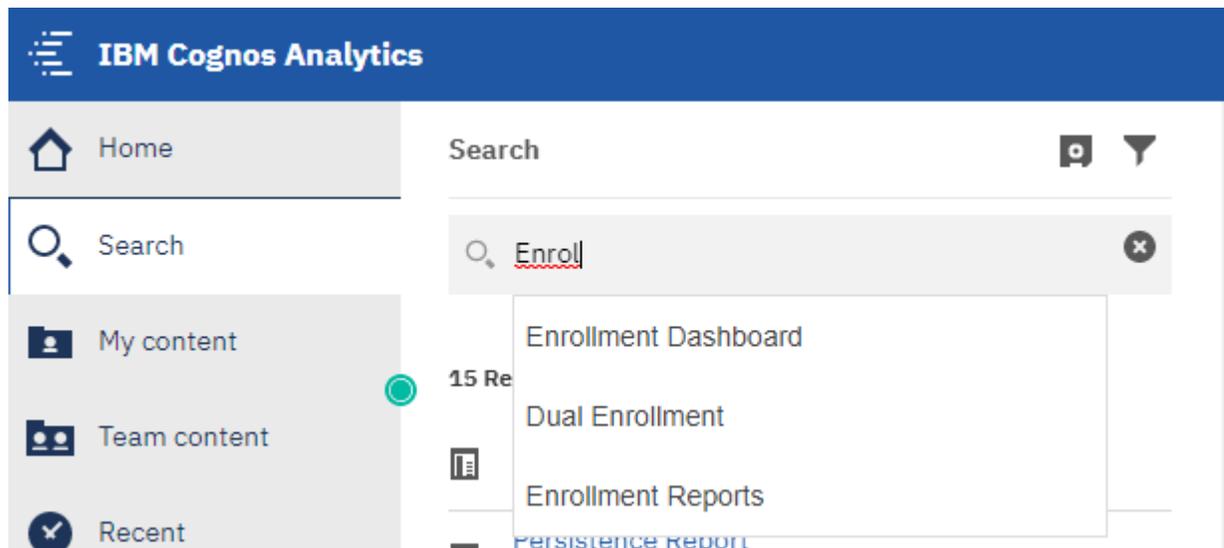
The screenshot shows the 'Recent Items' section of a software interface. On the left, a navigation menu includes 'Home', 'Search', 'My content', 'Team content', and 'Recent'. The 'Recent' section is active, displaying a list of reports under the heading 'Recently viewed'. The first report, 'Declared Students ... Grad Date & Advisor', is highlighted. A red arrow points to the 'More' button (three dots) next to it, which has opened a context menu with options: Run as, Edit report, Create report view, View versions, Create a new job, Share, Copy or move, Create shortcut, Remove from recent, Delete, and Properties.

Report Name	Path	More Button
Declared Students ... Grad Date & Advisor	Team content > Student > Advising	...
Enrollment Persistence - ... Drill Through	Team content > Student > Registration	
Enrollment Dashboard Home Page	Team content > Student > Enrollment Dashboard	
High School Non-Passing Grades	Team content > Student > Dual/JTED	
Financial Aid Award Detail Report	Team content > Financial Aid	
Admitted Students by Term	Team content > Student > Registration	
Grades Analysis By Subject	Team content > Student ... Reports and Analysis	
ADE Students	Team content > Student > Dual/JTED	
Hold Report - List of Students V2	My content	
Dual Enrolled follow-up	Team content > Student > Dual/JTED	

## Search

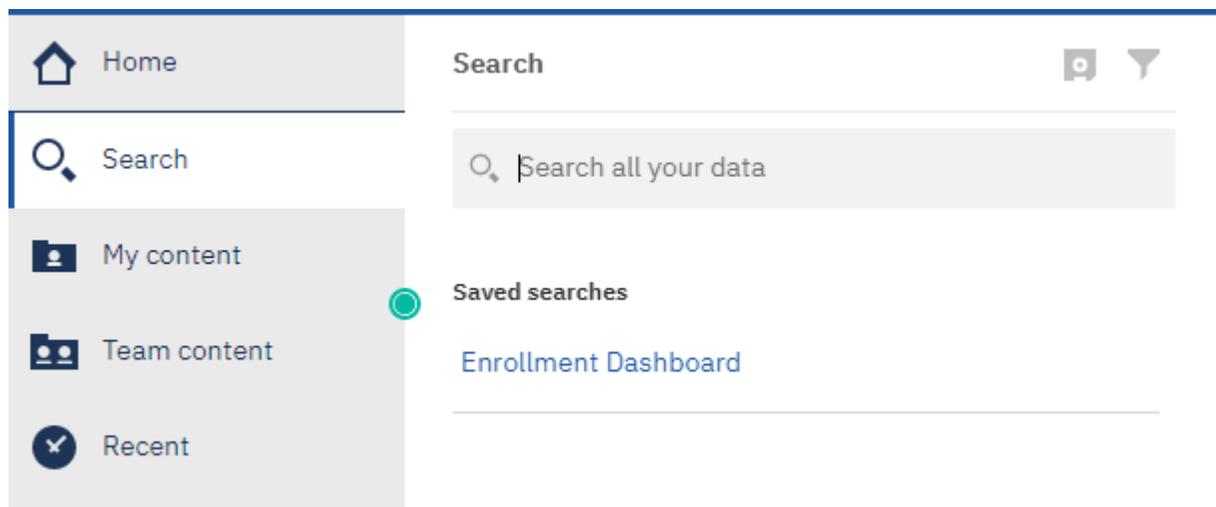
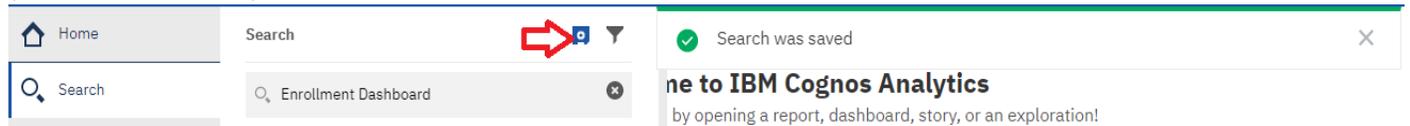
The **Search** tab allows users a quick and easy way to find reports.

To find reports, click the search tab and start typing the report name. The search uses intellisense to list objects with the typed information.



### Save Your Search

After you search and the results are listed, you can **Save** your search for future use. If filter options were included in your search, these options are also saved and listed under **Saved Searches**.



## Welcome Dropdown

### Welcome Dropdown Menu (Page Switcher)

The Cognos Analytics Welcome Portal is the default Home page. Clicking the drop-down on the Welcome Menu/Page Switcher and selecting **Welcome** will always return you to this landing page. However, you may select a report you frequently run as your “home page”.



## Welcome to IBM Cognos Analytics

Get started by opening a report, dashboard, story, or an exploration!

### More/Set as Home

Depending on where you are in navigation, capabilities behind the More button could change. You may make other content (like reports or dashboards) your Home Page. Click the **More** button on the application toolbar and select **Set as home**.



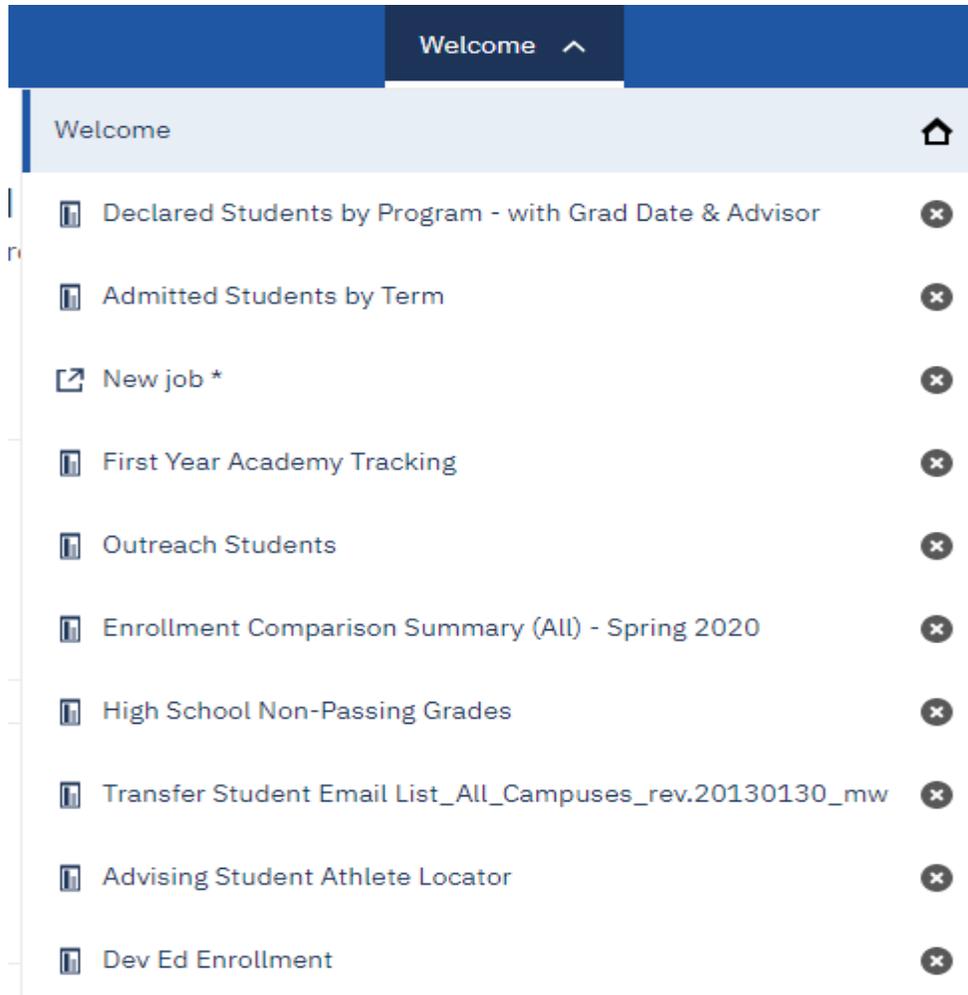
### Home Button

The Home button will return you to your home screen in a single click. This is a more direct route to your home page than using the switcher if you have chosen a new home page.

## Multi-Tasking

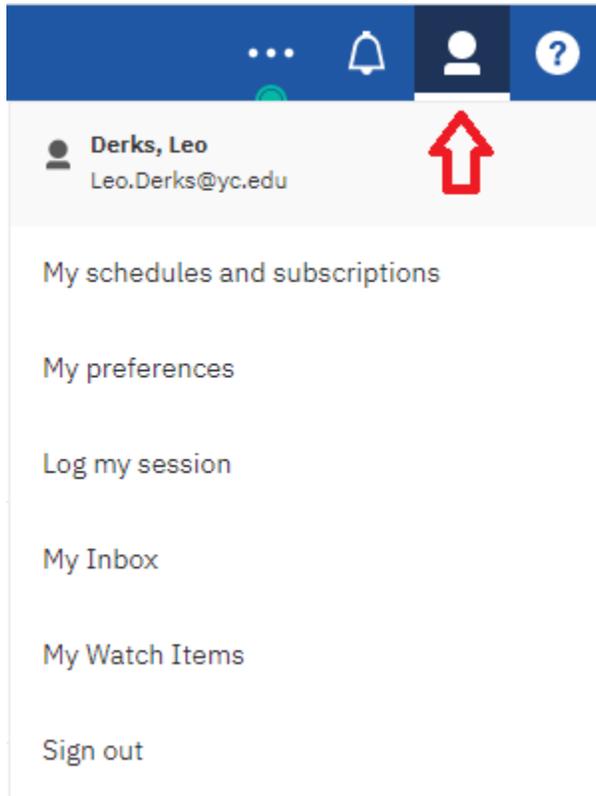
Cognos Analytics offers the ability to have multiple objects open or running at the same time. This allows a user to quickly switch between them. Once a report has been run, it will remain open in the tray.

You can close objects that are open in the tray by clicking the  to the right of the object name.



## Personal Menu

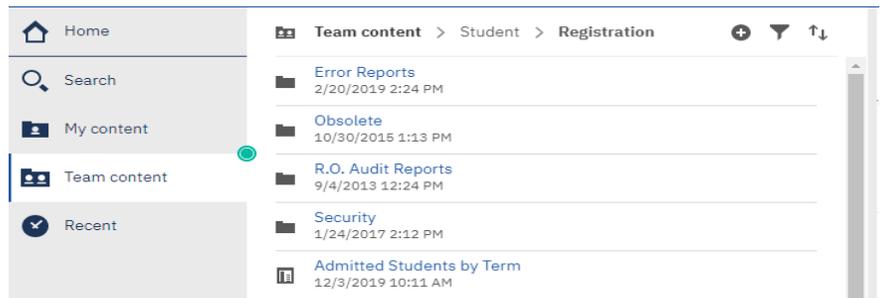
Use this area to adjust settings related to you as the user, to change preference settings, to easily make any modifications to your schedule and to logout.



# How to Run a Report

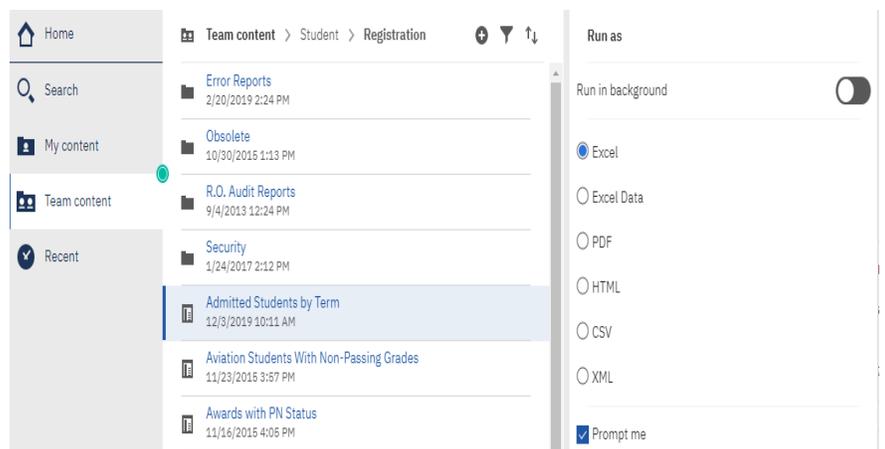
## Navigate to Report Location

Navigate to the desired report from **My Content** or **Team Content** on the Left Navigation menu and click directly on the report name.



## Use the Run As option

From this same navigation, hover over the desired report and click the **More** button to the right of the report. Choose **Run as** and select a method to run the report to a specific output type.



## Run from the Welcome Page

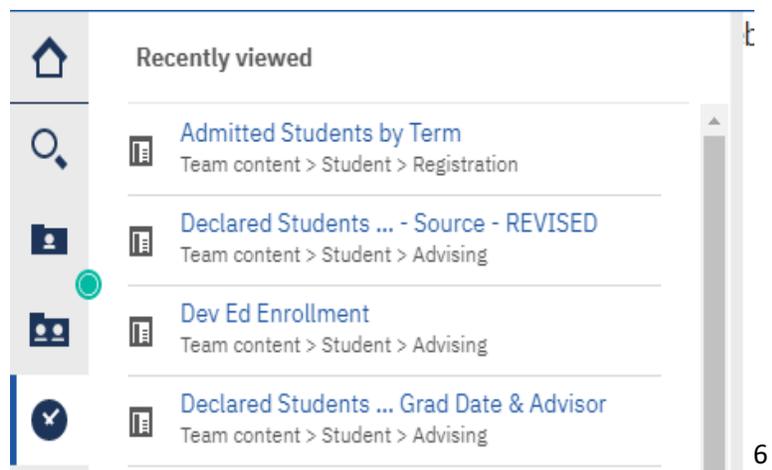
If you'd like to run a report that you've recently worked with, click the report title on the Welcome Portal.

### Recent



## Run from the Recent Tab

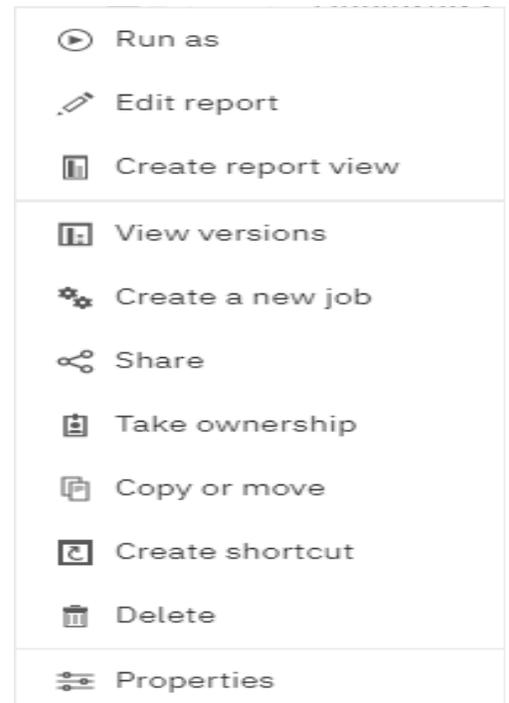
Navigate a previous viewed report from the Recent tab on the Welcome Page, then click on the report link.



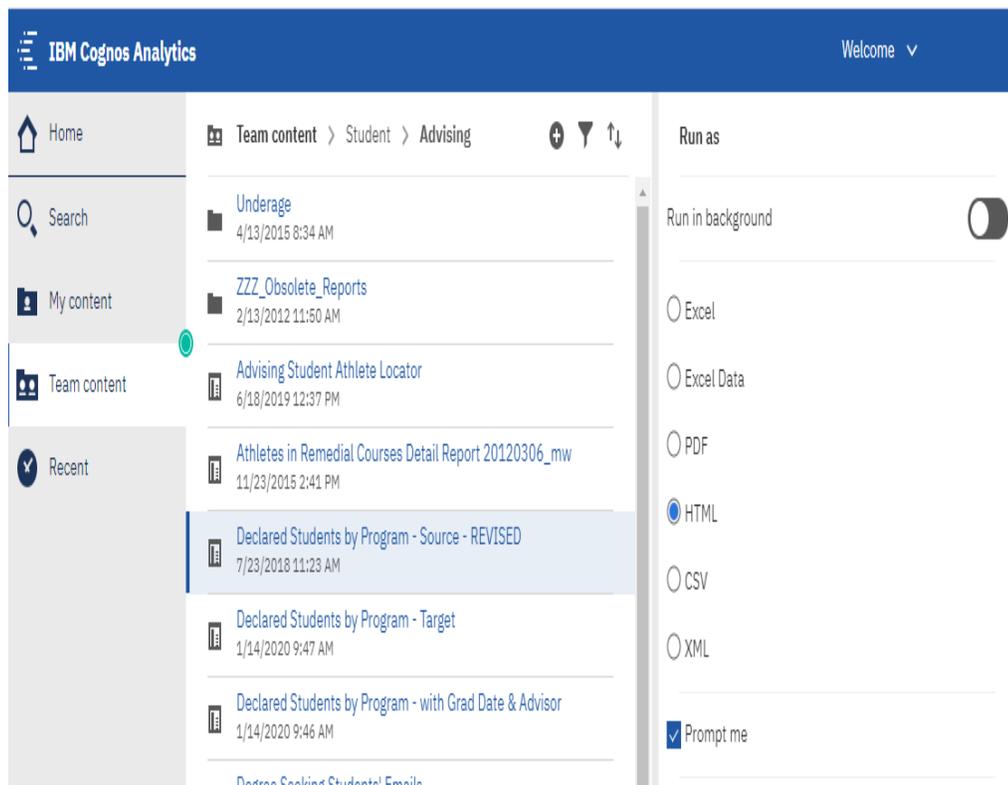
## The Action Menu

By right-clicking a report or by clicking the **More** button to the right of the report name, an **Action Menu** will appear.

Depending on your security access, you may not see everything in this menu.



**Run as:** Allows you to choose from a list of desired output and to run directly to it. Also allows for the option to *Run in background*.



	<b>HTML</b>	<ul style="list-style-type: none"> <li>• Default output</li> <li>• Web based and designed for viewing report output on-screen</li> <li>• All pages are displayed and accessible for any report containing tabbed layouts</li> </ul>
	<b>PDF</b>	<ul style="list-style-type: none"> <li>• Used for printing and distributing output in Adobe Acrobat Reader</li> <li>• Each page in a tabbed layout report will render its own page</li> </ul>
	<b>EXCEL</b>	<ul style="list-style-type: none"> <li>• Previously named Excel 2007 Format</li> <li>• Supports lists, crosstabs, icons, titles, subtotals, totals, and charts</li> <li>• Each page of a tabbed layout will render as its own worksheet</li> </ul>
	<b>EXCEL DATA</b>	<ul style="list-style-type: none"> <li>• Contains raw data of report</li> <li>• Report formatting (titles, charts, icons, subtotals, totals, etc.) are dropped and data is returned in spreadsheet format</li> <li>• Only the first page of tabbed layouts will appear</li> </ul>
	<b>CSV</b>	<ul style="list-style-type: none"> <li>• Exported data which is tab-delimited and can be imported to (or read by other software)</li> <li>• Strings are not enclosed in quotation marks</li> <li>• CSV exports show only the results of the report query</li> <li>• Page layout items, such as titles, images, totals, and subtotals do not appear</li> </ul>

	<p><b>XML</b></p>	<ul style="list-style-type: none"> <li>• Files that contain the .xml file extension are structured text files that contain custom tags that allow the transmission of files across applications</li> <li>• Running reports to XML will reveal code</li> </ul>
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**Edit report:** Allows Report Authors to open report in authoring tool to make changes to the original report.

**Create report view:** Creates a report view of the report in your My Content. This allows the user to schedule a report run.

**New versions:** Displays any previously saved report output.

**Properties:** Displays the report owner, shows when the report was created and last modified, and reveals the report description, if applicable.

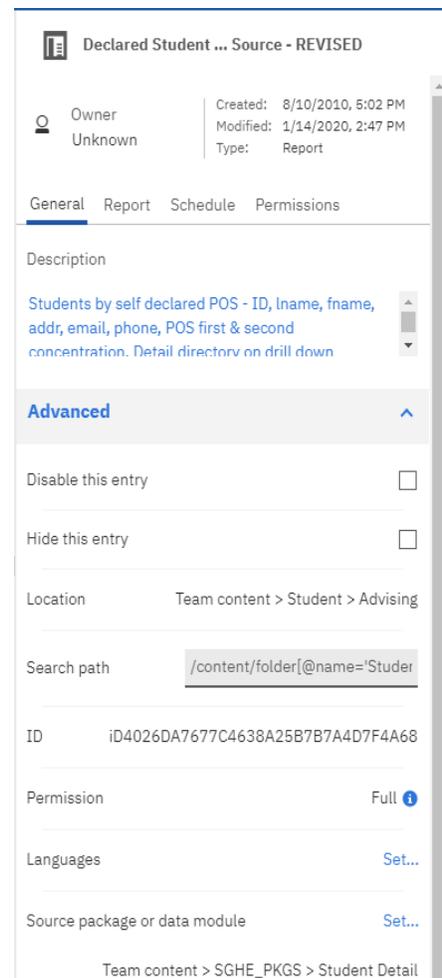
**Copy or move:** Copy or move a report to another destination within Cognos. The user must have write access to the other destination. A user can copy anything to their My Content area.

**Create shortcut:** Used to create a shortcut of the report in My Content.

**Share:** Copy link to share content with other users.

**Properties:** Contains 4 tabs of detail report information.

**General:** Provides detail report information such as author, report description and report modification.



The screenshot shows the 'General' tab of a report's properties in Cognos. The report title is 'Declared Student ... Source - REVISED'. The owner is listed as 'Unknown', with creation and modification dates of 8/10/2010 and 1/14/2020 respectively. The report type is 'Report'. Below this, there are tabs for 'General', 'Report', 'Schedule', and 'Permissions'. The 'Description' field contains the text: 'Students by self declared POS - ID, lname, fname, addr, email, phone, POS first & second concentration. Detail directory on drill down'. An 'Advanced' section is expanded, showing options to 'Disable this entry' and 'Hide this entry', both with unchecked checkboxes. The 'Location' is 'Team content > Student > Advising'. The 'Search path' is '/content/folder[@name='Studer'. The 'ID' is 'iD4026DA7677C4638A25B7B7A4D7F4A68'. The 'Permission' is set to 'Full'. There are links for 'Languages' and 'Source package or data module', both labeled 'Set...'. The breadcrumb at the bottom reads 'Team content > SGHE\_PKGS > Student Detail'.

**Report:** Prompt information as well as set values, and default report format options.

The screenshot shows the 'Report' tab of a configuration page for 'Declared Student ... Source - REVISED'. The page has tabs for 'General', 'Report', 'Schedule', and 'Permissions'. The 'Report' tab is active. It includes a 'Source' field set to 'Student Detail'. Under 'Prompt values', there is a checked checkbox for 'Prompt for values' and a 'Set values' link. The 'Report options' section includes a 'Format' dropdown set to 'HTML', a 'Set' link for 'PDF options', an 'Enable accessibility support' dropdown set to 'False', and a 'Language' dropdown set to 'English (United States)'. An 'Advanced' section is collapsed at the bottom.

**Schedule:** Add a schedule to run the report or update an existing schedule. This is where the date and time is set, run frequency, report format, report delivery (email, print, etc.) and setting default prompt values.

A schedule can only be created from the original Cognos report unless a report view is created from the original. Report views allows many unique schedules to be created. **Only the report owner can create the schedule.**

The screenshot shows the 'Create schedule' dialog box. It has a 'Back' button and a title 'Create schedule'. The 'Schedule' dropdown is set to 'Weekly'. The 'Period' section includes 'Start' (2020-01-15) and 'End' (2020-04-15) date pickers, both set to 9:17 AM, and an unchecked 'No end date' checkbox. The 'Run every' field is set to '1 week(s)'. The 'On day(s)' field shows a calendar grid with 'W' (Wednesday) selected. There is an unchecked 'Daily time interval' checkbox. The 'Options' section includes 'Format' (HTML), 'Delivery' (Save), 'Prompts' (Set values), and 'Languages' (English (United States)). A 'PDF' section has a 'Select' link. A 'Classic View' link is at the bottom left. 'Create' and 'Cancel' buttons are at the bottom right.

**Permissions:** Report permissions such as read, write, run or full by user type.

### Declared Student ... Source - REVISED

Owner: Unknown | Created: 8/10/2010, 5:02 PM | Modified: 1/14/2020, 2:47 PM | Type: Report

General Report Schedule **Permissions**

Override parent permissions

Name	Permission
Analysis Users Cognos	Run
Authors Cognos	Write
Consumers Cognos	Run
Information Distribution Cognos	Read
Modelers Cognos	Write
PowerPlay ... inistrators Cognos	Full

# Password Protecting PDF Documents

To preventing altering of a PDF document, you can password protect them.

1. Navigate to the **Properties** of the report you'd like to set this up for.
2. From the **Report** tab, click drop-down arrow to expand **Report options**.
3. Then click **Set next to PDF Options**.
4. Check the box next to **Requires a password to open the report**.
5. Set and confirm the password.

PDF options

Orientation Default ▾

Paper size Default ▾

Requires a password to open the report

Password:

Confirm Password:

Requires a password to access options

Password:

Confirm Password:

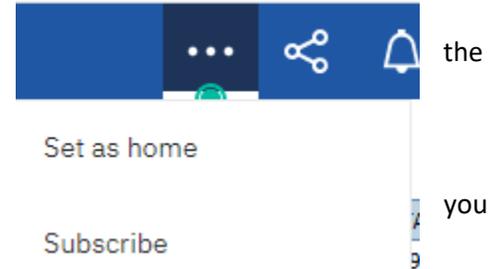
## Drill Through Reports

A drill through report allows users to see more specific details of a general report by opening an additional (or child) report.

Drill throughs are indicated by a blue hyperlink. When a hyperlink is clicked, the browser window opens for the drill through (or child) report.

## Subscriptions

Subscriptions is a new feature in Cognos Analytics to allow users to create a schedule through a report view. The **Subscribe** feature can only be used once a report has been run and is then found under the **More** button. Creating subscriptions automatically creates a Report View in your My Content. The reports you subscribe to will be delivered (to you only) with your custom prompt values and options. End-user schedules are now called subscriptions. If you use a report regularly, you might want to subscribe to it.



When you subscribe, you pick the time, date, format, and where you want it to be delivered. After you have subscribed to a report, you are notified each time it is delivered. You will see a numeric alert on the **Notifications** icon. Click to view any messages, which will contain a link to view the report output. If you specify email delivery, it can be sent to you only.

### Subscribe

When do you want to receive this report?

On day(s)

M	T	W	T	F	S	S
---	---	---	---	---	---	---

Time

🕒 11:07 AM

Format

📄 Excel >

Delivery

✉ Email >

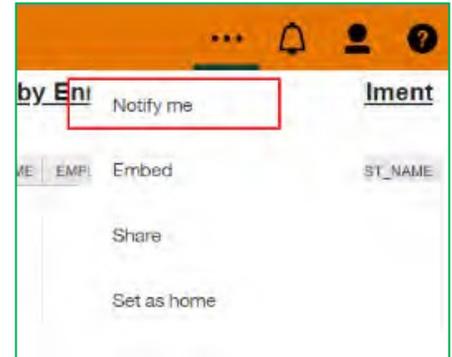
Prompts

6 schedule prompt values >

## Notifications

Notifications can be set up for report alerts. If you subscribe to a report or a report view, you are notified each time your subscription is delivered. If you view *saved output* and you want to know when there's a new version of the report, you can tap the **Notify Me** button.

The **Notify Me** button is available from the More button in the application toolbar only when you view a saved output version of a report. If you request to be notified when someone runs the report, you get a notification with a link to the updated version.

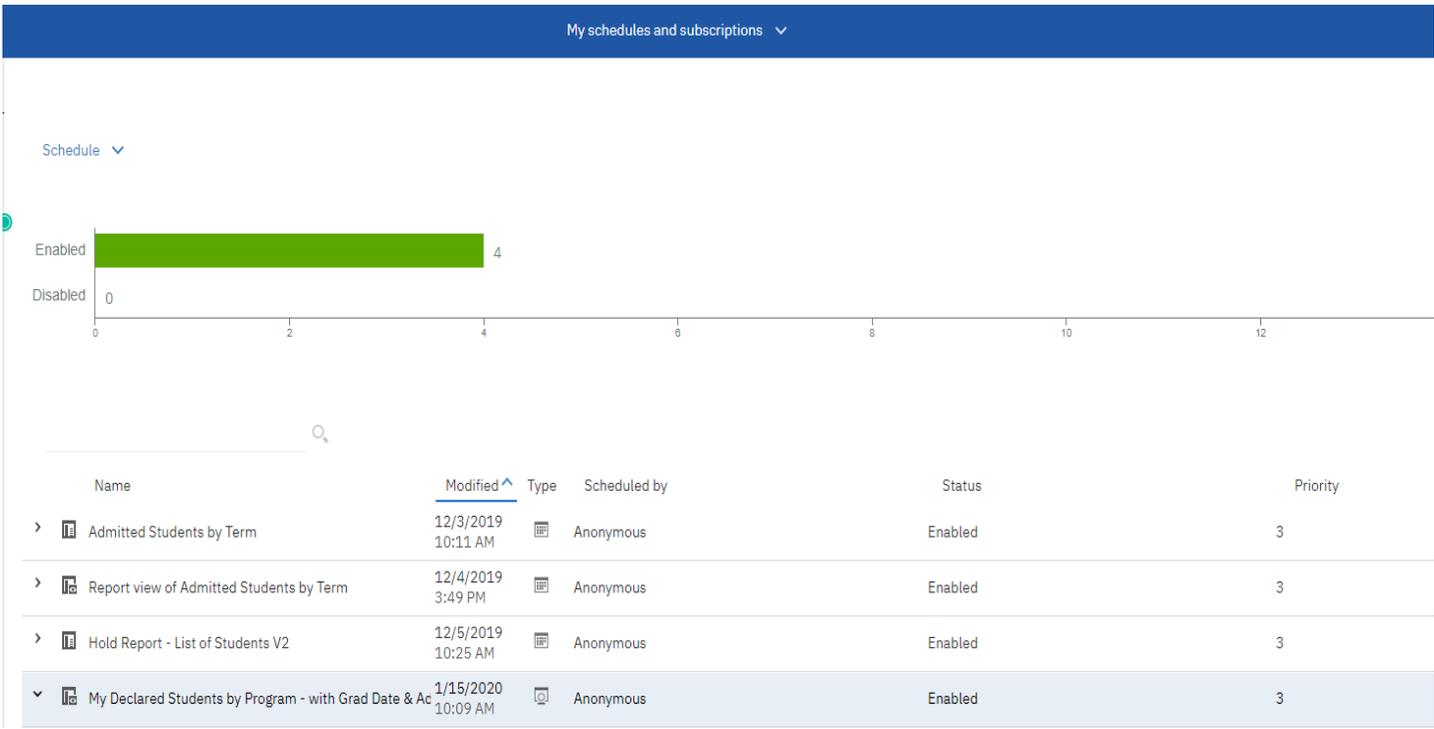
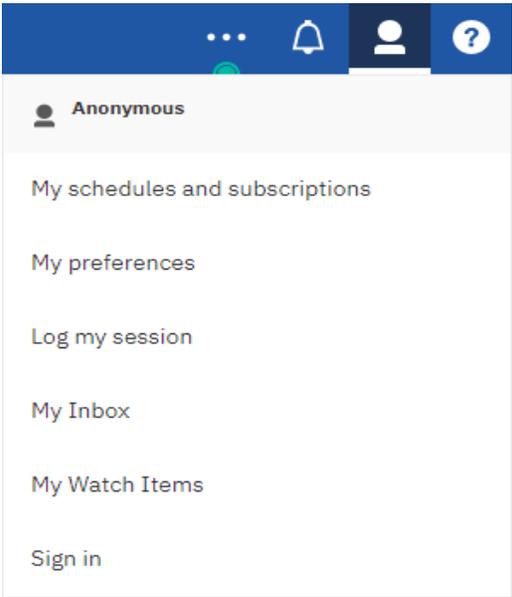


When you subscribe, if you choose the **Save the report on the system** delivery option, you receive a notification with a link to the new report version. To view a list of all your notifications, click the **Notifications** button on the application toolbar.



# Managing Your Schedules and Subscriptions

You can view and manage all of your schedules and subscriptions by launching the on the **My Schedules and Subscriptions** panel from the Personal Menu of the application toolbar. You can enable, disable, modify, or delete entries and view their saved outputs or archived versions. If you view the versions, you can also open the version details panel for information such as the run status, error messages, and run time.



## Create a Report View to My Content

Report Views are a combination of a shortcut and a dynamic copy of the original report. So, if you have a report that you want to run with different prompt values, schedules, delivery methods, run options, or output formats, you would create a Report View. The Report View will always refer to the report from which it was created. Any changes or modifications that are made to the actual report, after creating the Report View, will not be captured in the Report View until you re-runit.

To create a Report View:

1. Click the More button to the right of the report name.
2. From the drop down menu select Create report view.
3. Click the My Content icon and then click the Save button.

## Create a Shortcut to My Content

A shortcut is a pointer to another entry such as a report or report view

To create a Shortcut:

1. Click the More button to the right of the report name.
2. From the drop down menu select Create shortcut.
3. Click the My Content icon and then click the Save button.

## Difference between a Shortcut and Report View

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.