WAYNE STATE UNIVERSITY

Cognos Analytics Consumer User Guide –
An Introduction to Navigation in Cognos Analytics 11.0.9

COGNOS

Analytics

February 2018

For additional information regarding Cognos, policies and access, or modifications to the ODS, please create a TS ticket at ts.wayne.edu.

For technical assistance, contact the Help Desk at helpdesk@wayne.edu or (313) 577-HELP.

[Type here]

Contents

➢ INTRODUCTION

The purpose of this training guide is to familiarize you with the basic features of Cognos Analytics.

For some people, this will be the only Cognos instruction you will need; however, Cognos Consumer training is a pre-requisite for The Operational Data Store and Utilizing Metadata, and Report Authoring training.

❖ *What is Cognos?*

- Cognos is a business intelligence and performance management software suite sold by IBM. The software suite was designed to enable non-technical personnel in large enterprises to extract corporate data, analyze them and then produce reports that would help the business make informed decisions.

- Cognos is a Web-based, integrated business intelligence suite that provides a powerful toolset for mining, analyzing, scorecarding and monitoring of events, data and metrics. It allows a business to become top performing and analytics driven, giving it the capacity to actually predict or find market trends and then react to them with informed decisions.

➢ COGNOS OVERVIEW

High Level look at Cognos Analytics Interface Components

❖ **Welcome Portal** is the Web portal for IBM Cognos BI.

It is the Starting Point for all functions provided in the suite. Where you can:

• Run reports, search for content, view **My content**, **Team content**, and **Recent** lists, open dashboards, open stories and other items, upload files, check your notifications, set your preferences and home page, and review your subscriptions.

• Delete, copy, move, edit, run as, set properties, set permissions and more, depending on the type of entry in the content list (and your Cognos security).

❖ **Reporting Portal** is the interface for IBM Cognos BI where you can:

• Create and edit a wide range of professional reports.

• Use templates or customize your reports with prompts, bursting, advanced charts and visualizations.

A Brief Introduction to Cognos Roles

These are the Cognos roles used here at the University:

- **Consumer** - A user who is able to logon to Cognos and run reports that have been prepared by another author.
- **Report Studio User Class** - A user who is able to create and run complex reports in the Reporting Portal. Most of the reports you will be running as a Consumer were created in the Report Portal

There are a variety of user profiles for Cognos based on your University functions, department functions and needed folder security, here are just a few:

- c_fin_vrep_scr – for Finance folders and standard certified reports
- c_hr_vrep_scr – for Human Resources folders and standard certified reports
- c_stu_vrep_scr – for Student folders and standard certified reports
- There are many other profiles that are specific to departments, internal and external folders. Permissions to some folders are controlled by the unit or department.

A Bit about Cognos Data Sources

- Cognos utilizes data primarily from the Operational Data Store (ODS).

- The ODS receives its data from Banner and other University sub systems, external vendor sources such as Black Board, Coeus (Researchers Dashboard), Online Hiring System. Data in the ODS is refreshed nightly.

- There are exceptions where live data is available for time sensitive processes. Changes made in Banner are usually not reflected in the ODS until the next day.

❖ ACCESSING COGNOS

There are 3 methods to access Cognos
- The first two methods involve accessing Cognos **via links in Academica**

  - Business Intelligence Reporting Portal
  - Advanced Cognos Users

- The third method is to enter the **Cognos URL in a web browser**

Via Academica (no need to log in directly to Cognos as the authentication to Academic allows automatic login to Cognos)

Logon to **Academica**; select Employee Resources **> Administrative Systems >**

RESOURCES

⌄ **Employee Resources**

    ⌄ **Administrative Systems**

        Admissions / ALeRT
        Advance
        Advanced Cognos Users
        Advisor Training Academy
        Banner
        Banner Documentation
        Begin OSFA Student Award Authorization
        Business Intelligence Reporting Portal
        Effort Certification
        Electronic Personnel Action Forms
        Employee Separation / Off-Boarding
        Labor Redistribution

❖ 1. Select the **Business Intelligence Reporting Portal** link
  o An easy to navigate WSU MAIN PORTAL is displayed**:**
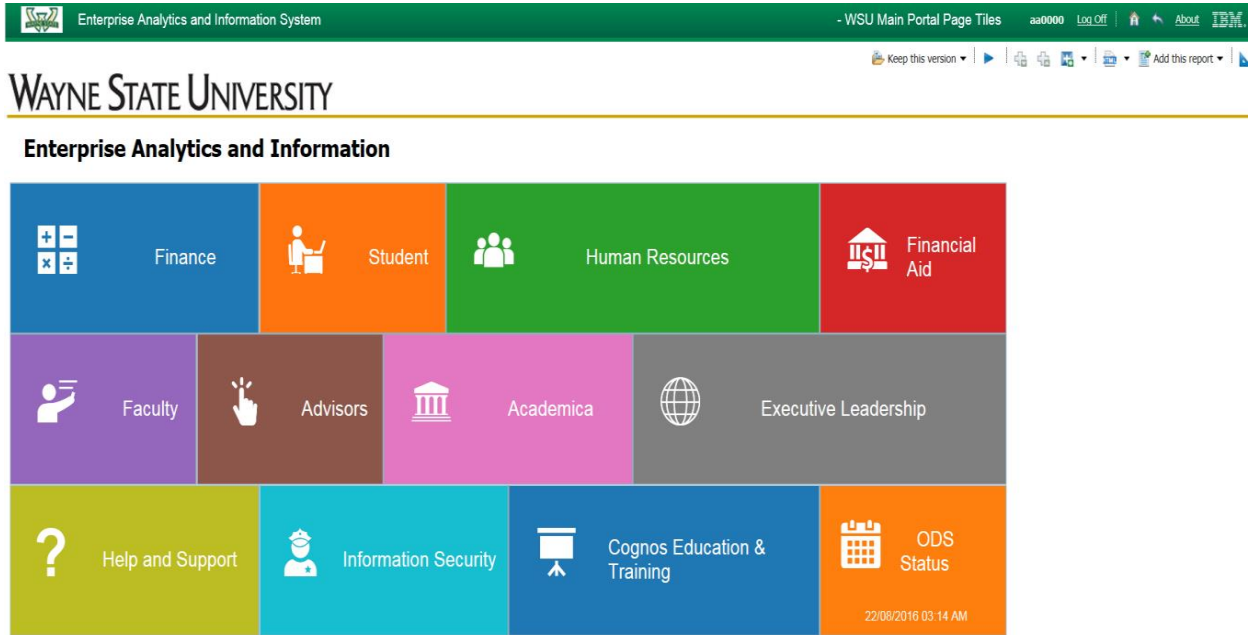
Or

❖ 2. Select the **Advanced Cognos Users** link**:**
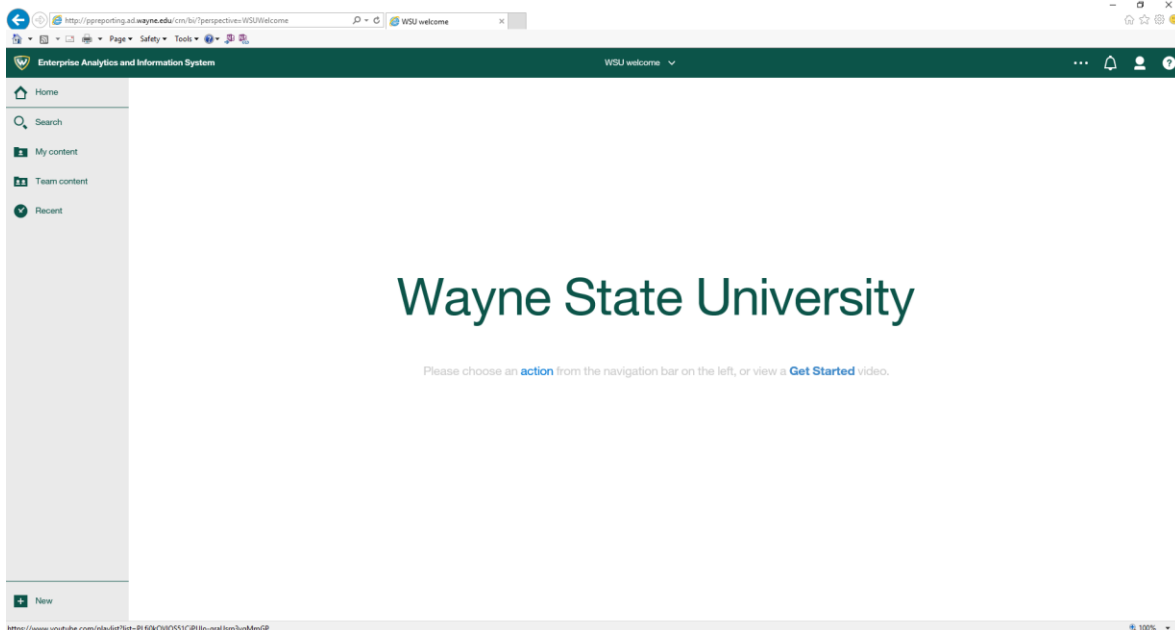 o The Cognos **Welcome Portal** is presented:
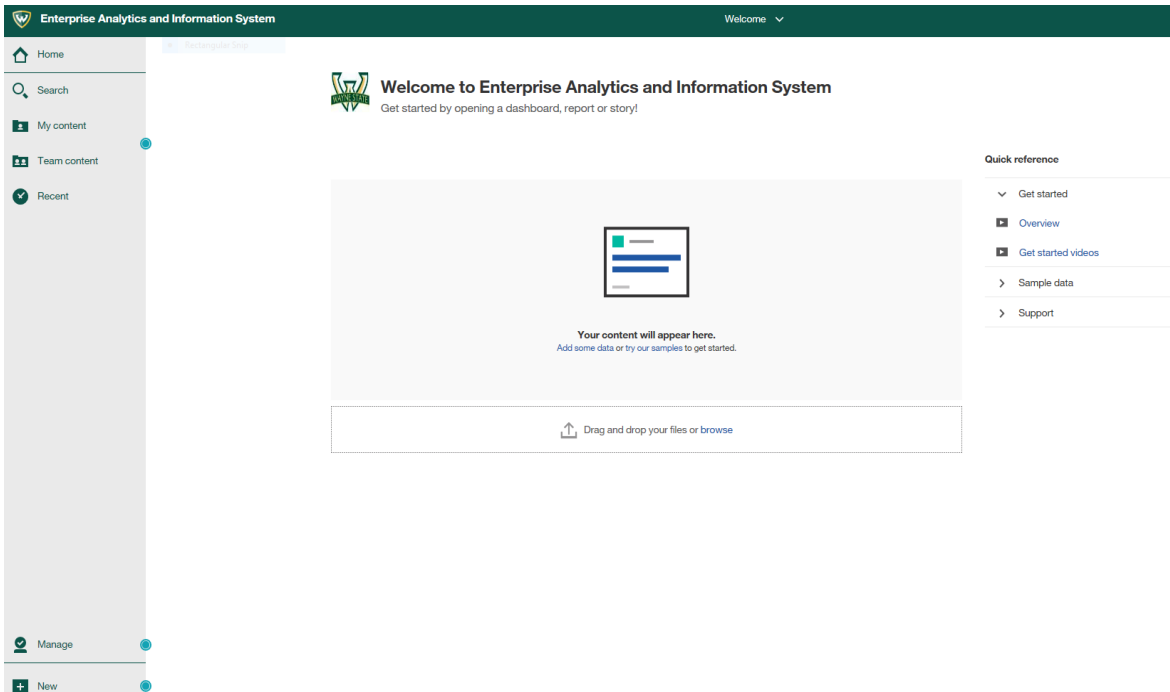
3. Access directly via the URL https://bireporting.wayne.edu
    You will be presented with the official University logon page for Cognos.
    You will need to log in to Cognos using your accessed and LDAP password.
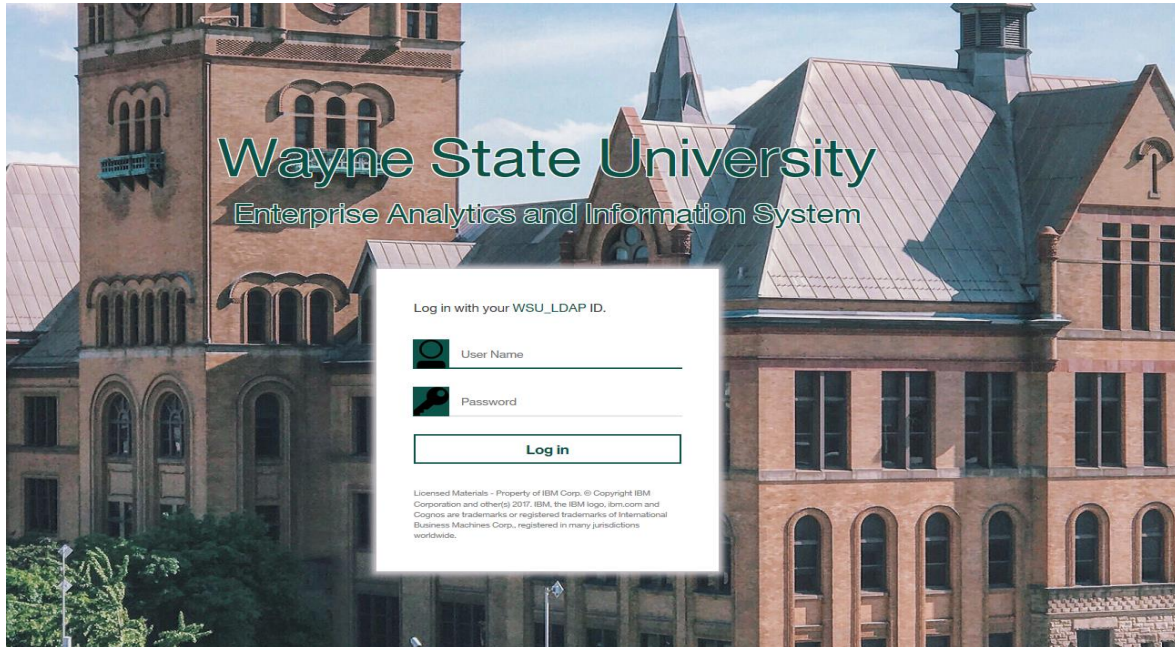
After successful authentication into Cognos, the Cognos **Welcome Portal** is presented.

❖ A DEEPER DIVE INTO THE COGNOS WELCOME PORTAL

*The **Cognos Welcome Portal** is your default home page in Cognos – but you can set that to a Report or Dashboard*

*You can access you Home page by the click the **Home** icon*

  ➢ The Home screen can be set using the three dots (ellipses) the top of the page – from anywhere in Cognos

This portal features a sliding panel on the left serves as the "content explorer"

On this panel, you will find numerous icons:
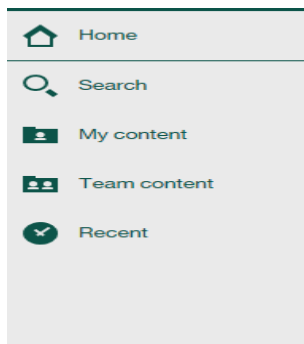
The **Search** icon allows you to search for content and does so as you type

The **Team Content, My Content**, as well as **Recent**ly accessed content are accessible from this page.

In addition, you can access **Analysis Studio, Event Studio, Query Studio** and **Workspace** (if access granted) from this page by clicking on the **New** icon
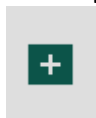
  and then the **Other** icon

➢ GETTING TO YOUR REPORTS

Through the **Welcome Portal** you can access the reports that have been previously created and saved. You will access reports in Cognos by selecting the folder that contains your report.

This is done in the **Welcome Portal** and these reports will be housed either in the **Team Content** (WSU content) or **My Content** (personal content) area.

➢ SEARCH

- To search for reports
- Click on the **search** icon
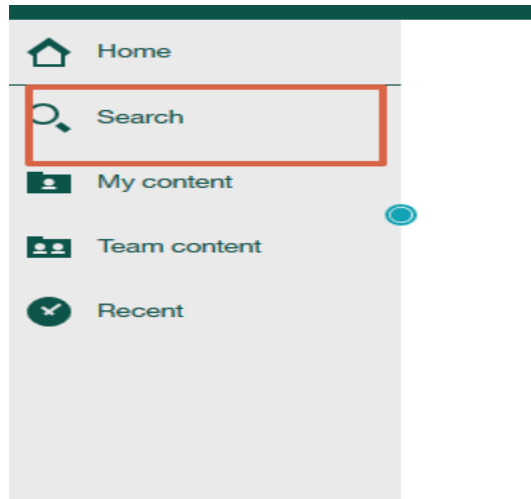
- Begin typing the report name that you want to search for in the search box. The new search engine returns results as you type, similar to the Google search page
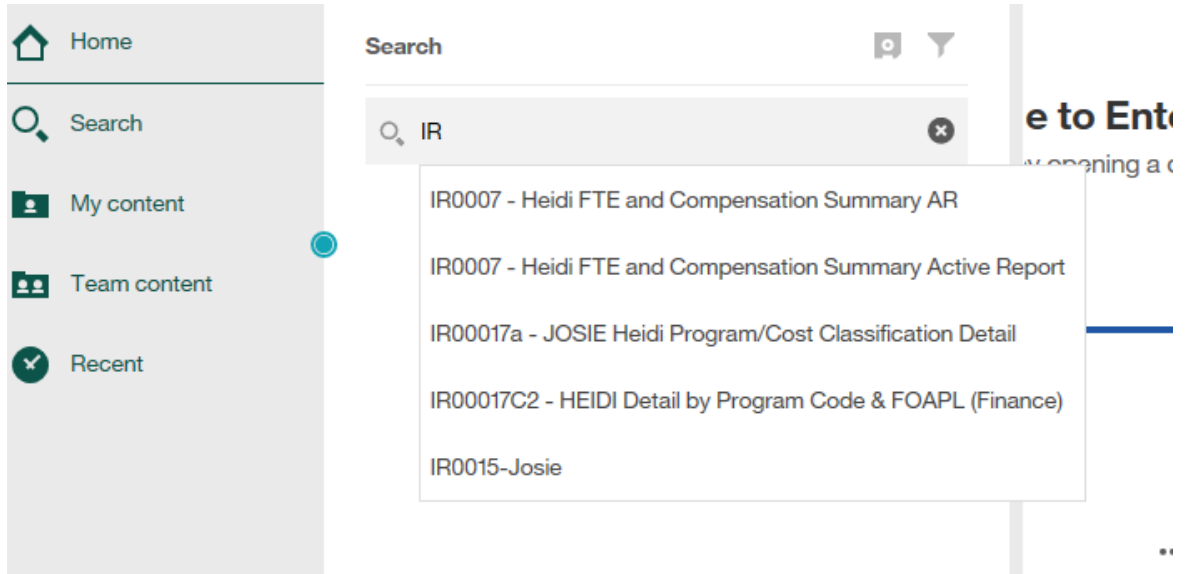
- After you type your search criteria (and press the Enter key or select search criteria from the dropdown), a list of results will appear below.
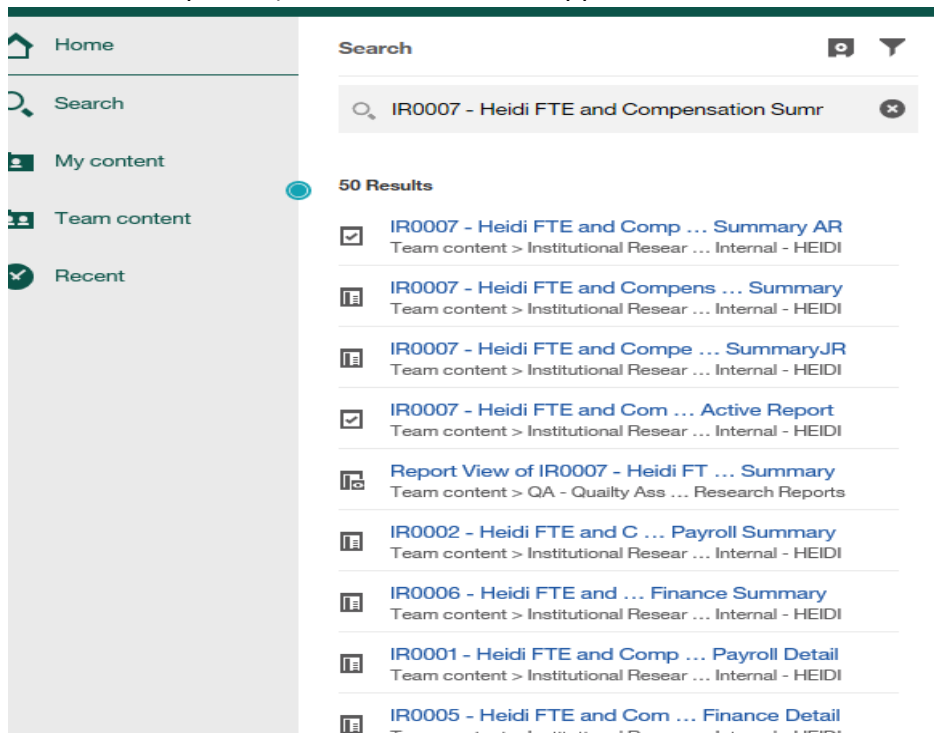
- Select the **funnel** icon to Narrow your search
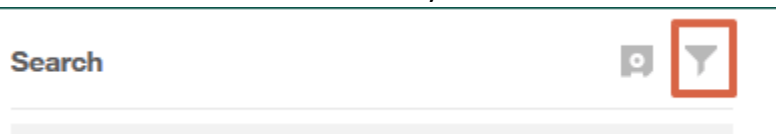
- You can narrow by type (reports, dashboards, data, folders) or by last modified (all, today, yesterday, past week, past month)

Note: there is an icon in the front of the object name that when moused over tells you what type of object this is (report, report view, dashboard)
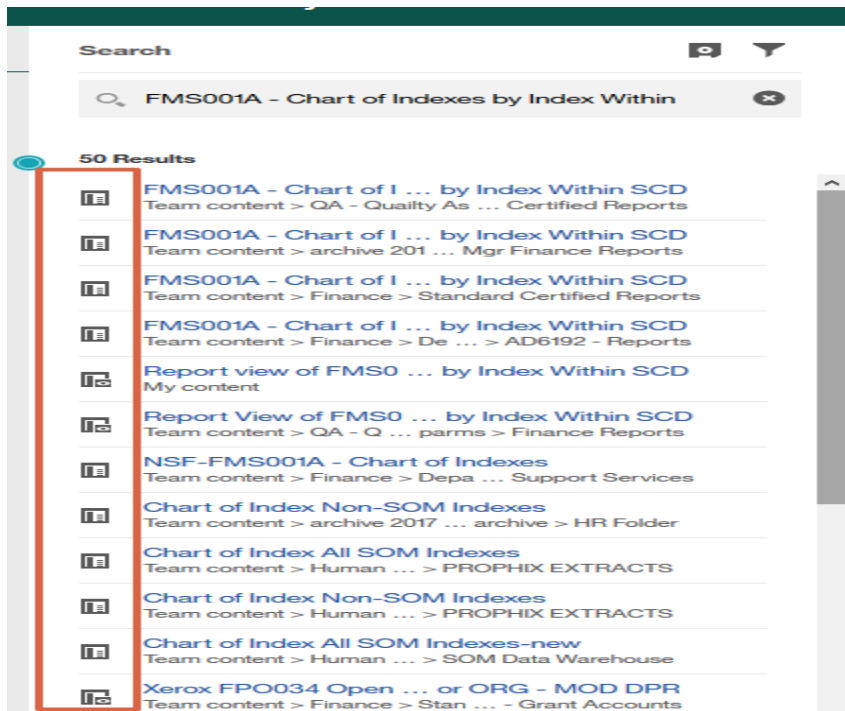
The **ellipses** by each entry allow for quick actions to be taken on the individual object
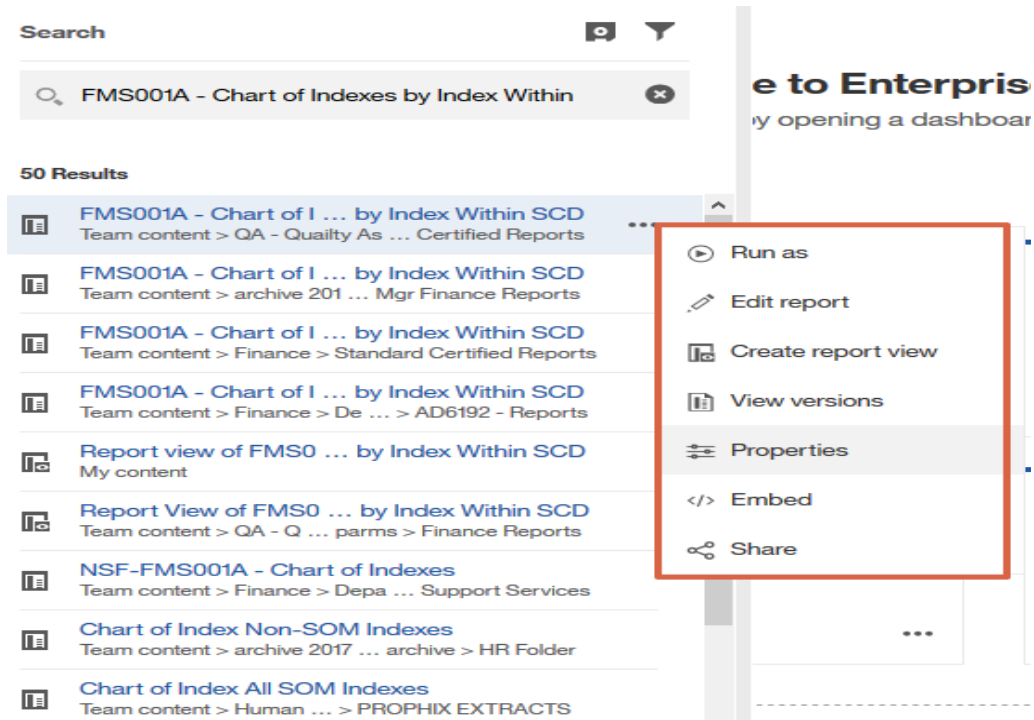
➢ TEAM CONTENT
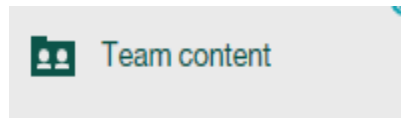
Clicking on the **Team Content** icon will expand the team content area. This is the area that contains WSU's content.

This is where you find reports, packages, dashboards, stories, models, and more. Items in Team content are organized in folders, so searching with keywords is an easy way to find what you're looking for.
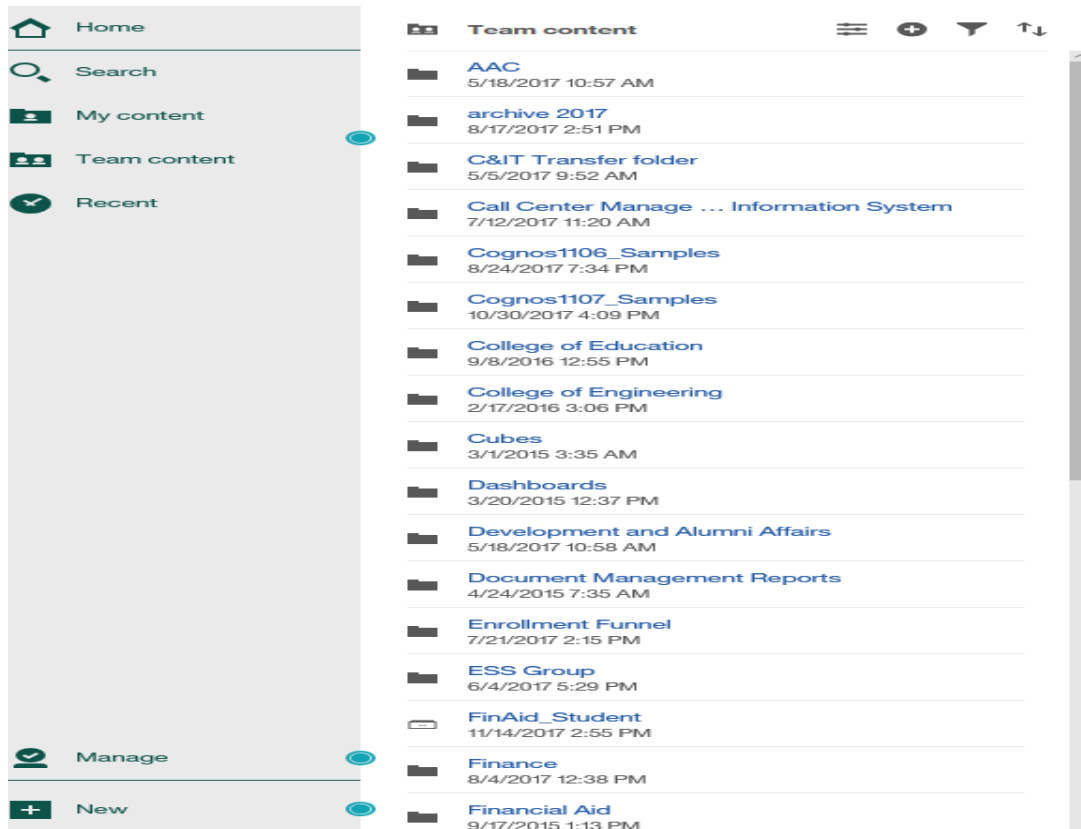
It is here that you will find "public team content" that are primarily the 'Standard Certified' reports. These are generally grouped by business area or function such as:

Development and Alumni Affairs
Finance
Human Resources
Student

Note: This will look different for everyone as it is your role and access that will dicate which Team folders you can see and access.

➢ MY CONTENT

Clicking on the **My Content** icon will expand the my content area
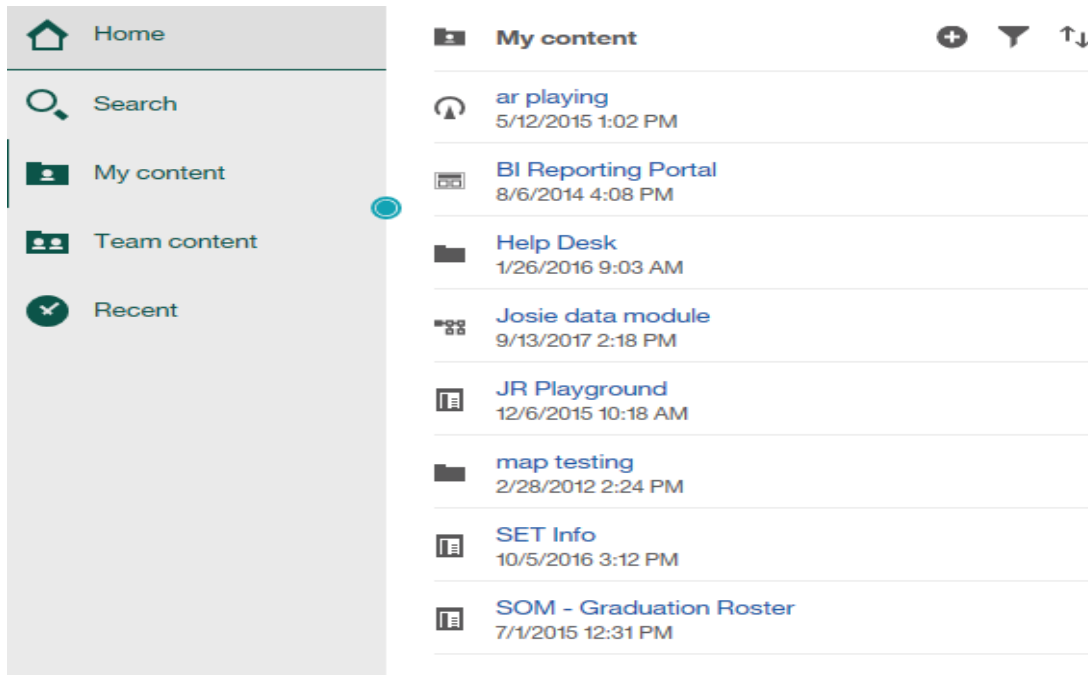
It is here that you will find your personalized reports.

The folders here allow you to customize, organize and save reports specific to you.

Think of this area as your "playground" – for reports specific to your needs and accessible by only you.

By clicking on the + icon at the top of the page, you can also add new folders to further organize your reports.

Note: This will look different for everyone as this is your own personal work area.

➢ RECENT REPORTS
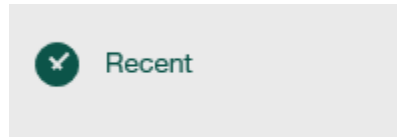
The **Recent icon** can be clicked which will present a slide out pane that will show the most recently accessed or viewed object list.

Notice the ellipses that show when you mouse over the objects. These provide a shortcut for you to perform various functions directly on the objects in the list.

You can Run the report, edit it, create a report view, see the various versions of the report, modify the properties, copy or move the report, copy the code to embed the report in another object, copy the link to share the content with other users, or remove the object from the recent list.
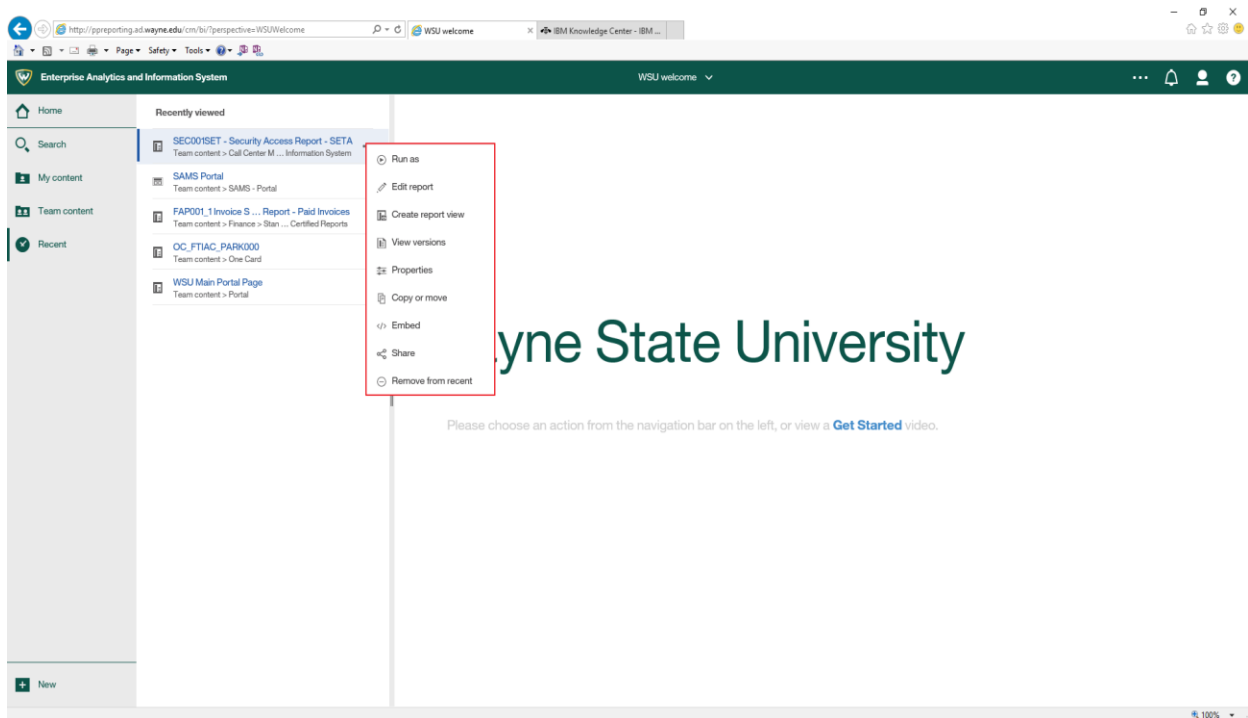
➢ RUNNING REPORTS

You can run reports in Cognos using various methods. Below are some of the ways.

- Either click on the report name in the list. This is a hyperlink that will automatically run your report.
- Or right click on the report name and options will be presented for you to **Run as**
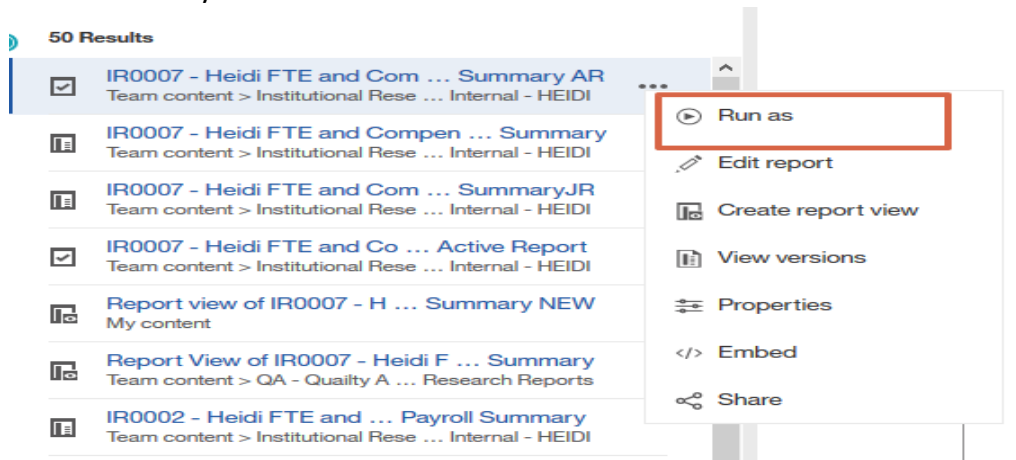
- Or use the **ellipses** and select the **Run as** option which will present you with options to **Run in background**, select the output format, and allow for prompting before actually running the selected report
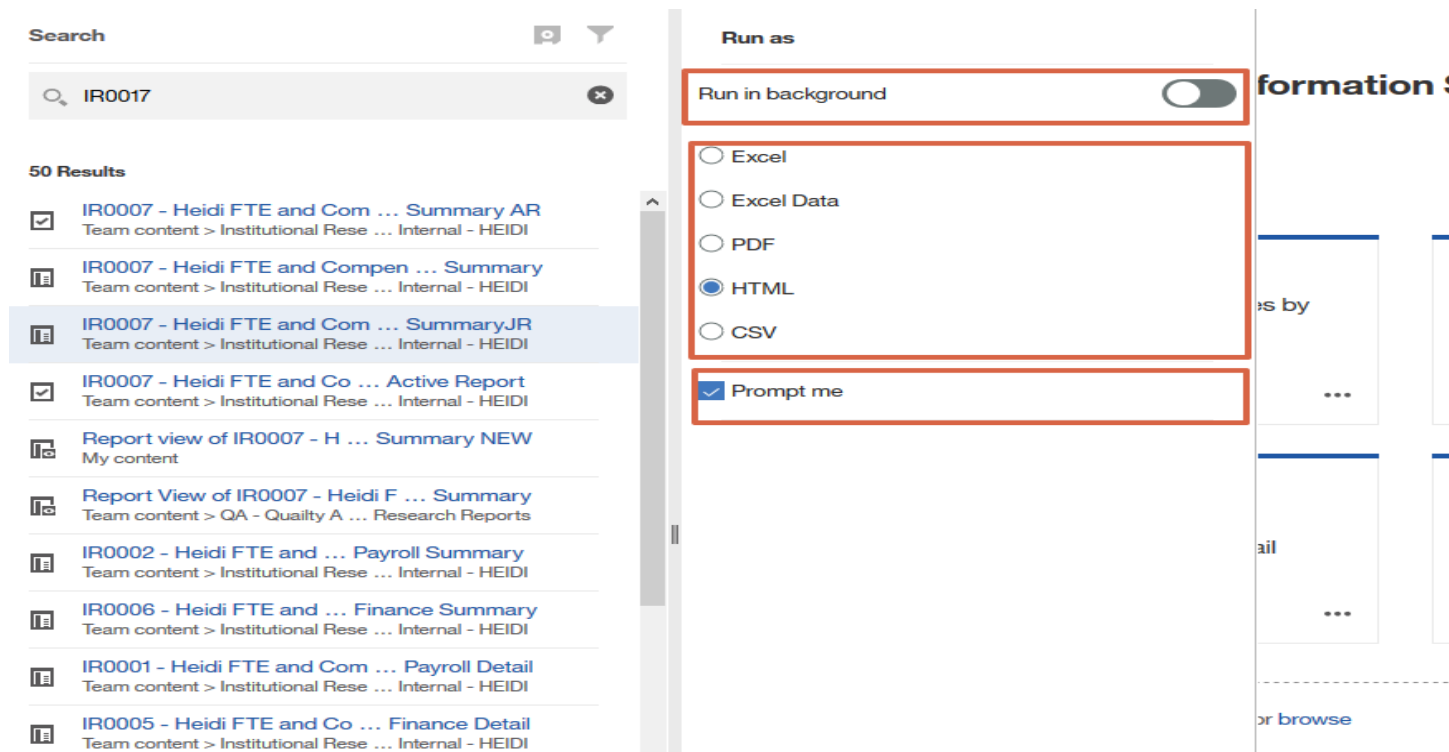
If your report has prompts that prompt page will be presented where you can choose the parameters you require to generate the report.

Required prompts will be flagged with a red asterisk and the finish button will be inaccessible until a selection is made
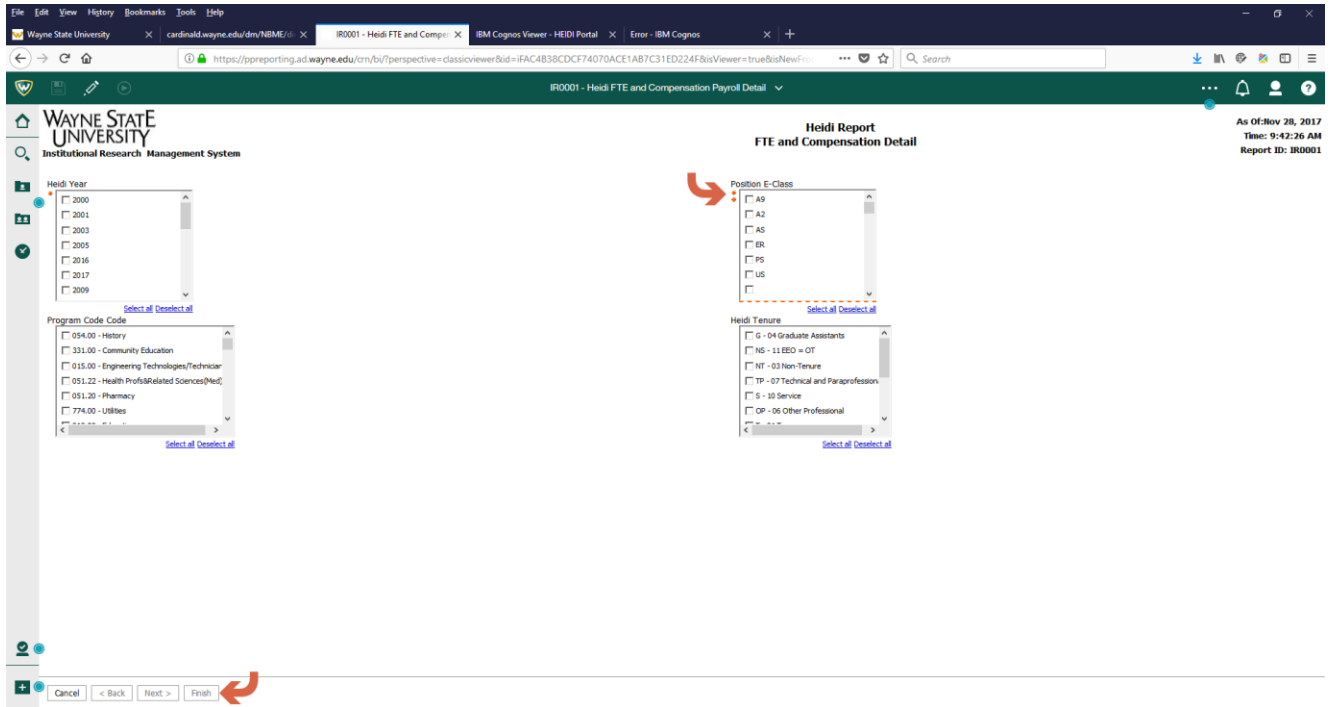
Once the prompts are selected, you can run the report by clicking the **finish** button
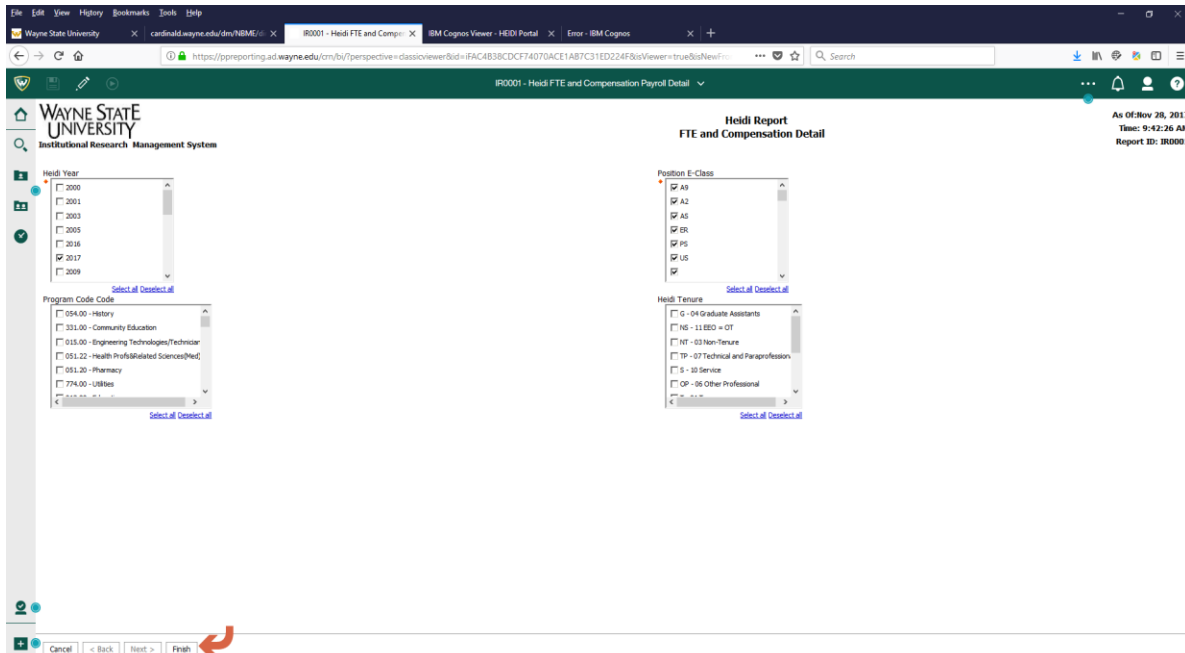
The report will be generated and displayed if html format is selected.

- ***A FEW HELPFUL HINTS:***
    Re-Run - you don't have to close out of your report to re-run it.

    Select the **Run As** icon and then choosing the "Reset prompts and run" link. You will be taken back to the prompt page where you can select new values. (Note: The previously selected prompts are retained).

Change Format link - After you run your report, you can view it in different formats including Excel and PDF.

This is done by clicking the **Run As** icon and then choosing from the various output options in the list.
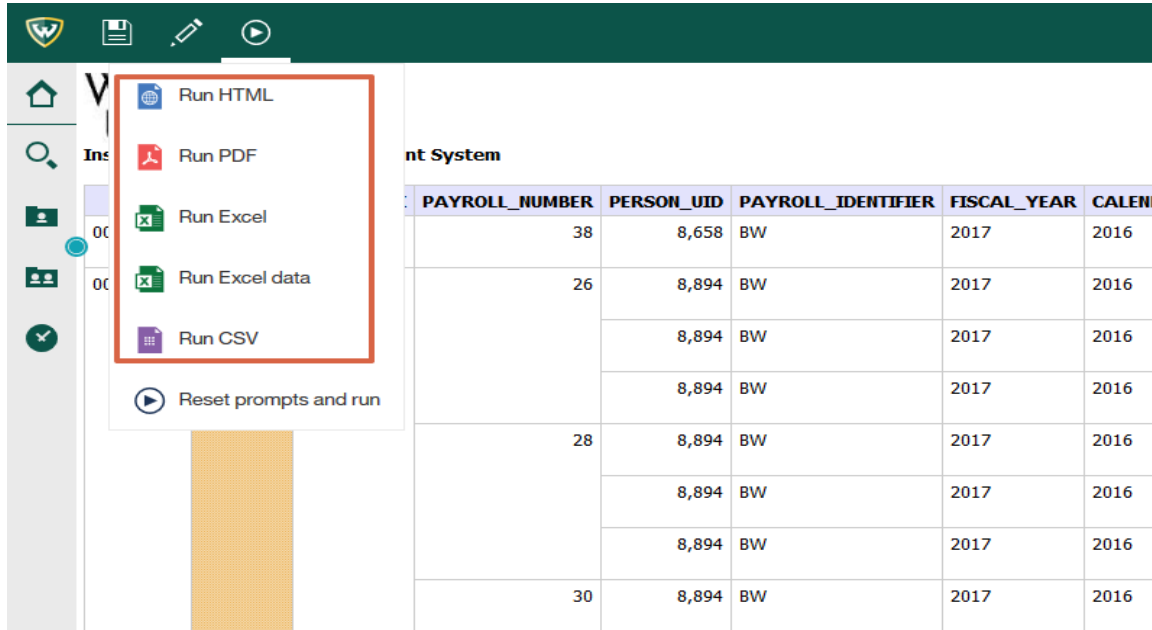
➢ CREATE REPORT VIEWS

You can create a report view, which uses the same report specification as the source report, but could have different properties such as prompt values, schedules, delivery methods, run options, languages, and output formats.

Creating a report view does *not* change the original report. You can determine the source report for a report view by viewing its properties. The report view properties also provide a link to the properties of the source report.

If the source report is moved to another location, the report view link is not broken. If the source report is deleted, the report view icon changes to indicate a broken link, and the properties link to the source report is removed.

Creating a report view enables you to easily locate a report or save entered parameters.

Report views are saved to your personal space in the **My Content** area.

To create a report view:

- Select the report you wish to create the view on by right clicking the report name or click the **ellipses**. Select the **Create report view** option from the list.

The Report View "Save As" screen will be presented.
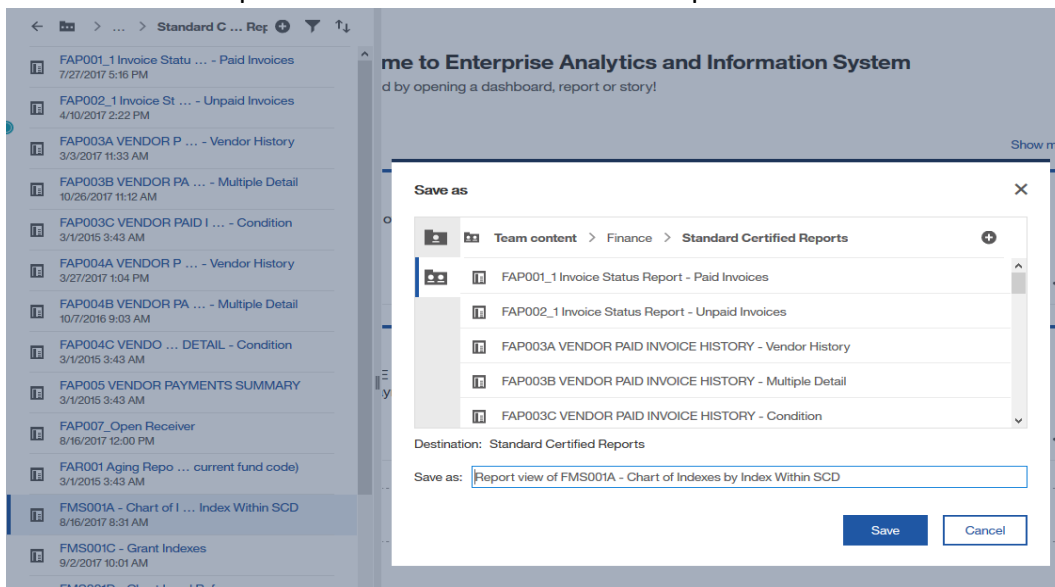
- Enter a name for your report view. We recommend that you maintain the report ID and name but add the additional information that would personalize the report.

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- Select **My Content** for the location to save the report. You do this by clicking on the **My Content** icon.
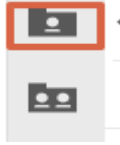
- Select Save.
- The report view will can now be found under your "My Content" area:
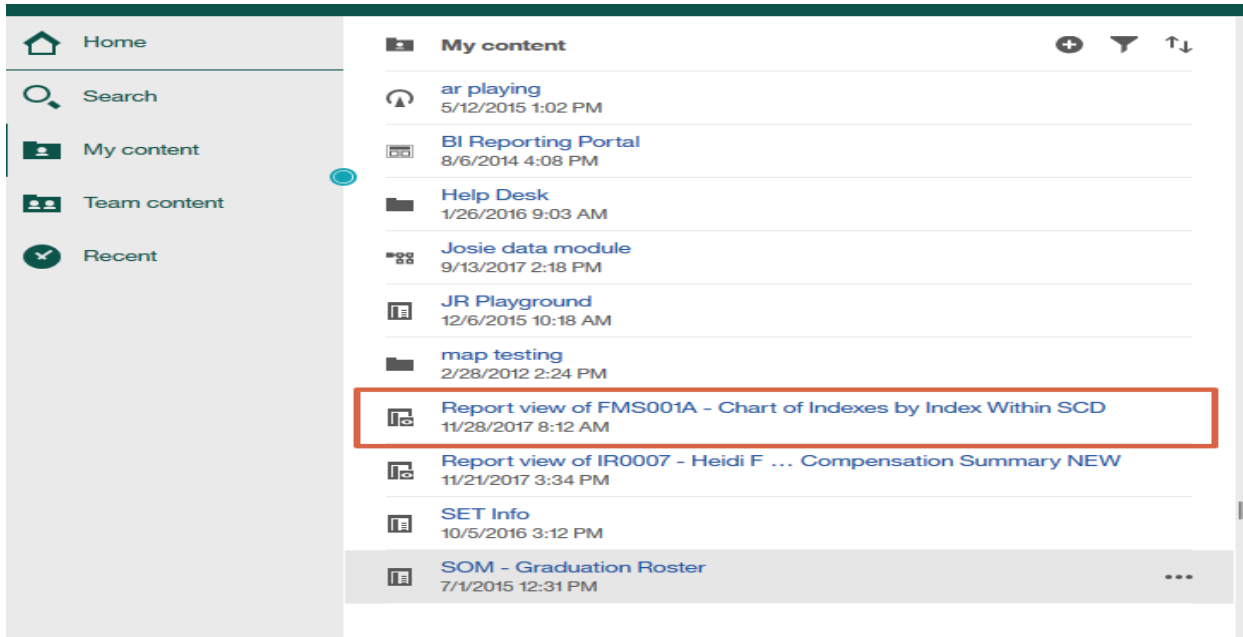
The report can be customized by saving your specific parameters.

- Right click on the report view or use the ellipses to see the option list.
- Select the **Properties** option
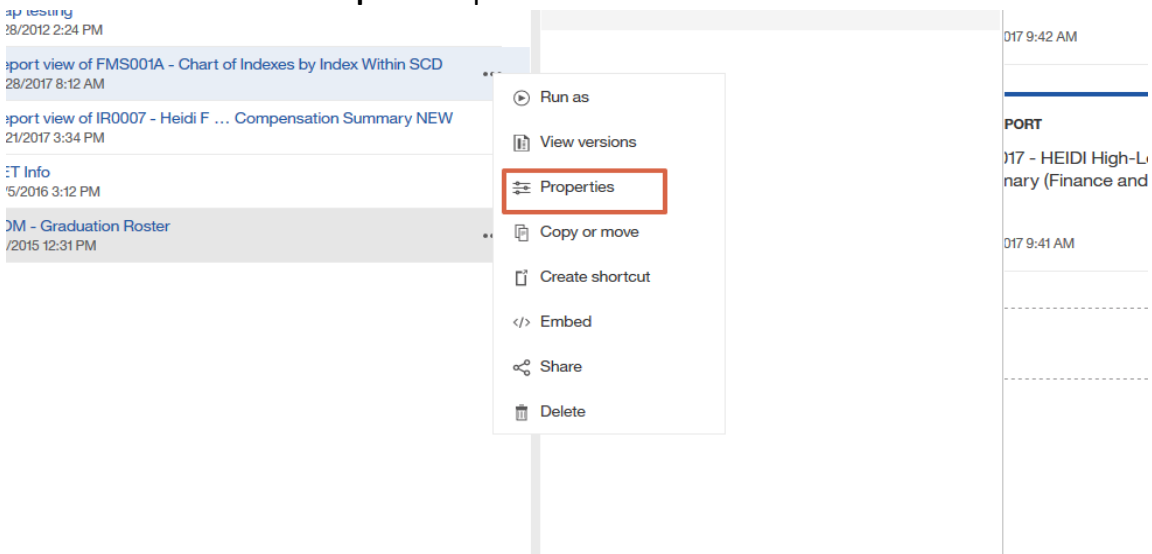
- Then click on the **Report** tab
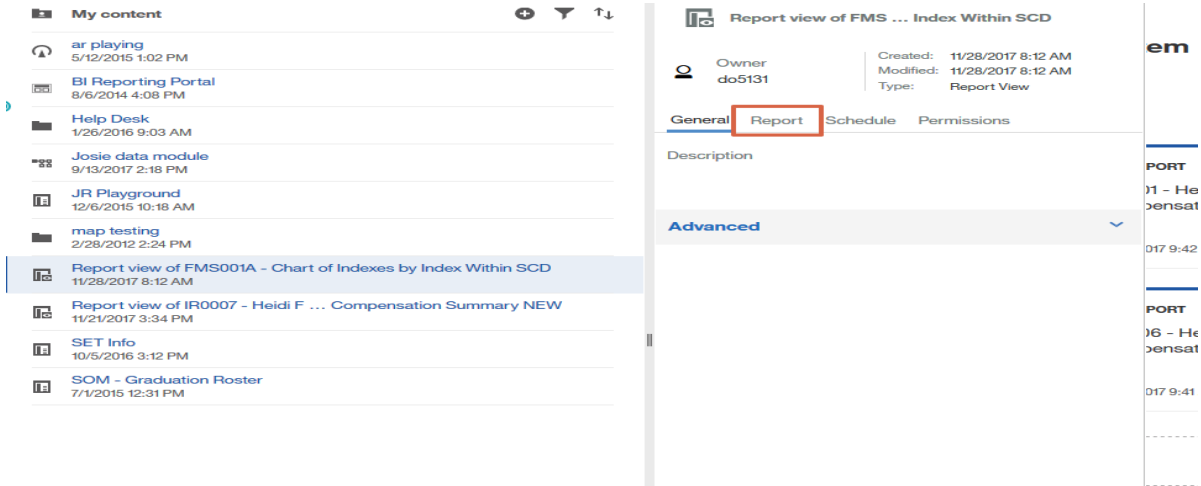
- Click on the drop down arrow under **Report options**
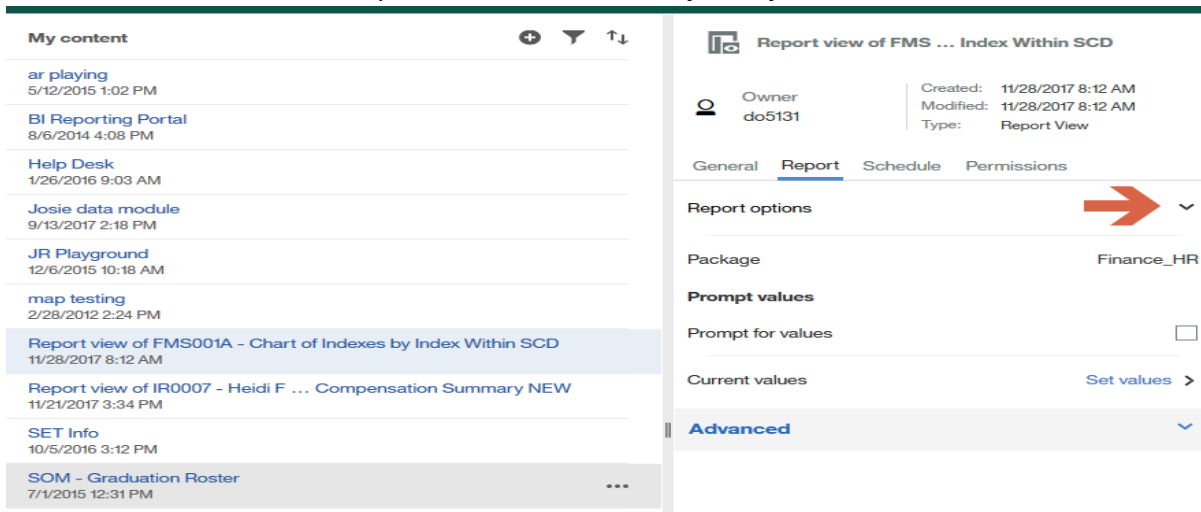
- Under Report options select the format you would like
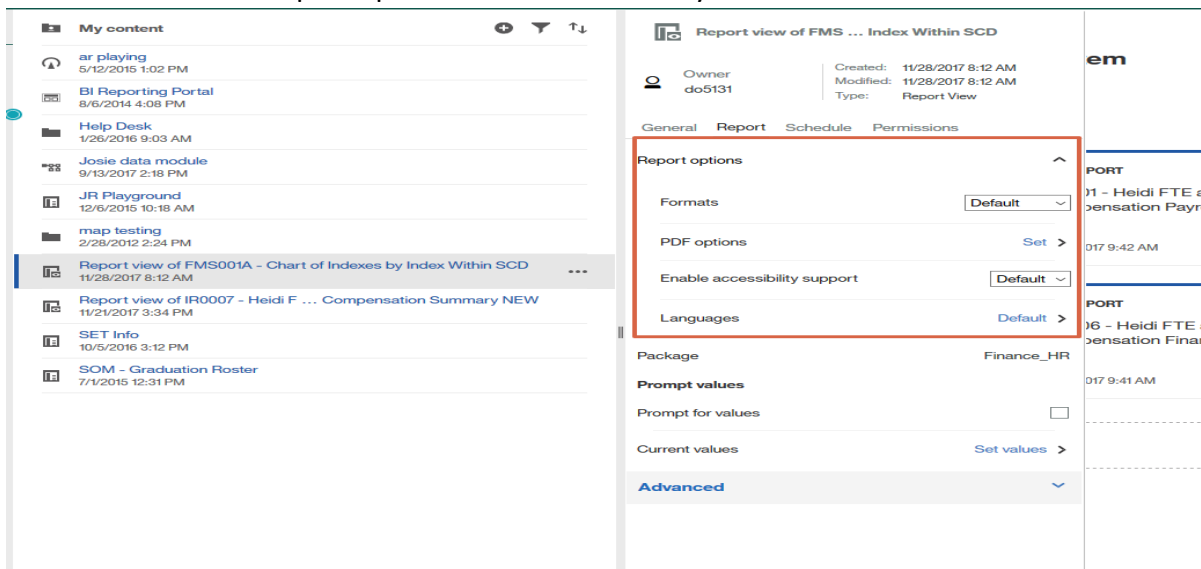
- Under **Prompt** values select **Set Values** to set the parameter prompts and leave the **Prompt for values** checkbox unchecked

- Then choose the **Set** option to set the **Current Values**

- You will be presented with the report's parameter page. Select the **Parameters** and hit **Finish**

- Note the prompt values you selected are now displayed.

- When you run the report now, the parameters you chose are saved and will be used and you will not be prompted to change them. Here you see the report generated using the prompt criteria:

- If you want to run the report using different parameters select the **run with options** icon .
- You can change the **Format** if you choose to and uncheck the **Prompt for values** check box. You can then perform a single run using the different parameters. Your preset prompts are still set.

➤ SUBSCRIBING (SCHEDULING) REPORTS

Cognos allows users to schedule reports to run on recurring dates and times. This process allows you to automate the generation of and sending out of reports. **The scheduling of reports is called creating subscriptions.**

This means the user can generate a routine report without manually processing it each time through IBM Cognos Portal.

☐ You can subscribe a report without creating a reporting view.
- After you run a report and are presented with the report output view, you can use the ellipses at the top right bar and select subscribe

- Select the day, time, format, delivery and the prompts previously used are saved
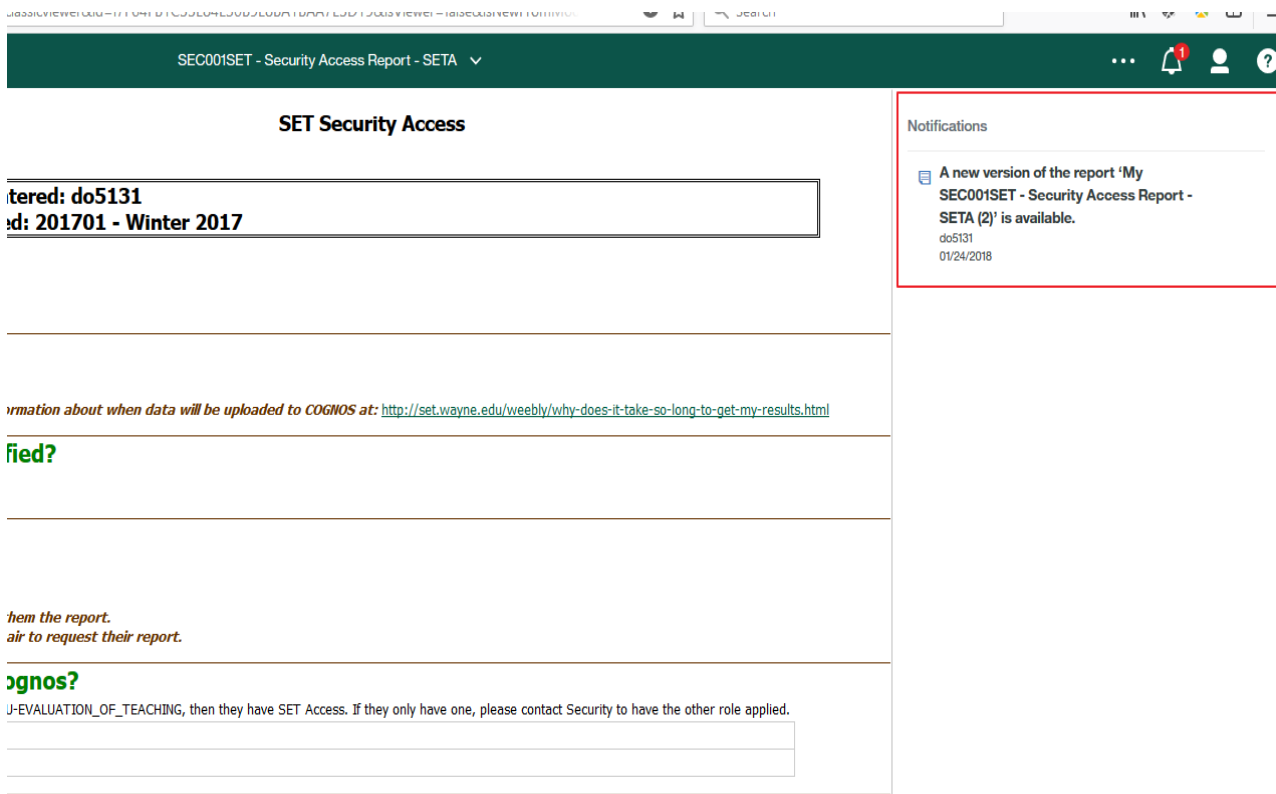

- The user will get a notification when the subscribed report has run and the new version has been created. **Bell** icon will show a number

  indicating that the version is created
- Click on the **Bell** icon and see the notification that the new version of the subscribed report is ready.

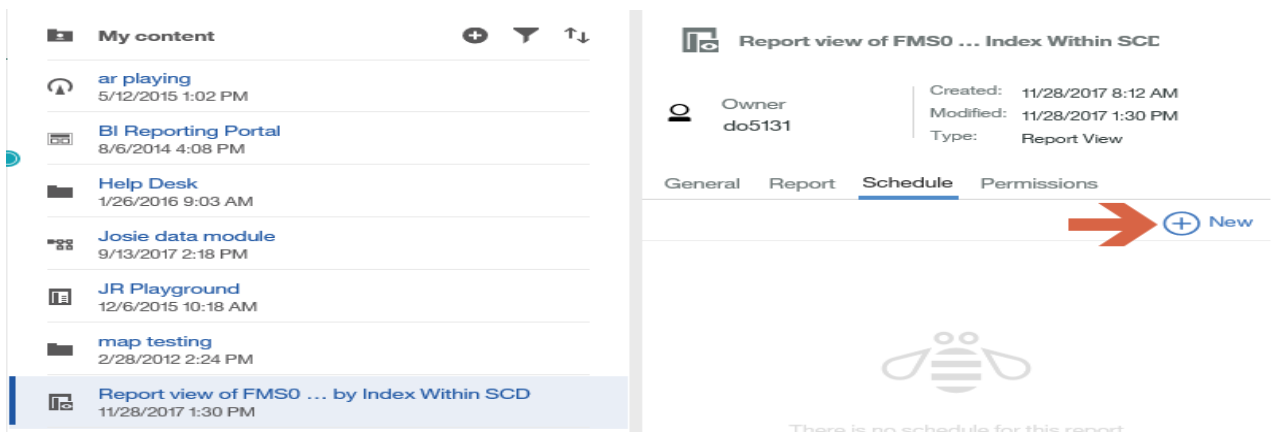☐ You can also subscribe a report using a reporting view.

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To subscribe reports you will be using report views that have been saved to your **My Content** area.

To create a subscription:

- Find a report view in the **My Content** area window.

- Right click or use the ellipses on the report view in the **My Content** area and select the **Properties** option. From here you can select the **Schedule option**
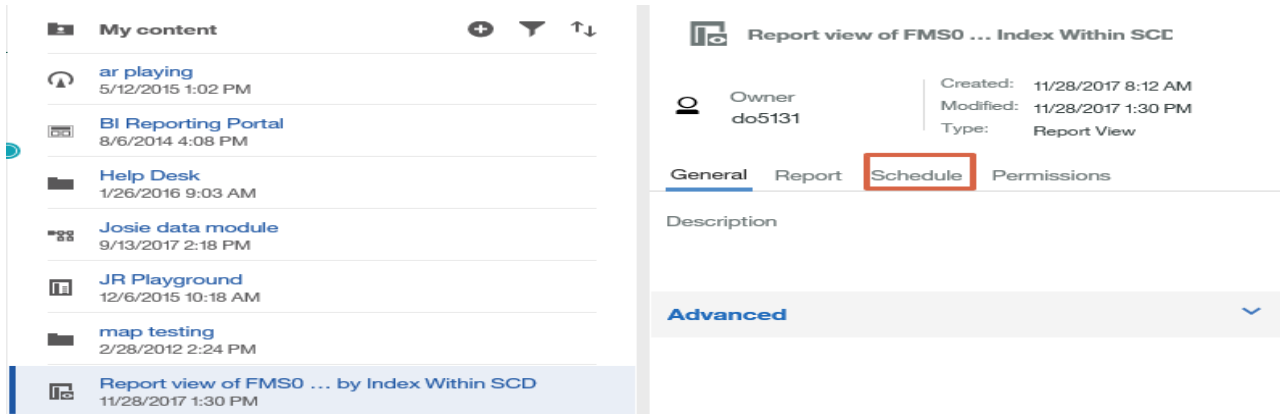
- Then choose the **(+) New** icon to create a new schedule

- You will then be presented with the **Create schedule** page

- You can chose a *period* of time when the schedule will be in effect. You can pick the *frequency* of the report as well as the *format*, *delivery*, and the *prompts*. Note how the prompts you previously selected are retained.

- To pick the delivery method, click on the **Delivery** option and choose if you want to **save** the report (default) or **send the report by email**. Note the **Print report** functionality is not set up.

- To send the report by email, click that check box for that option
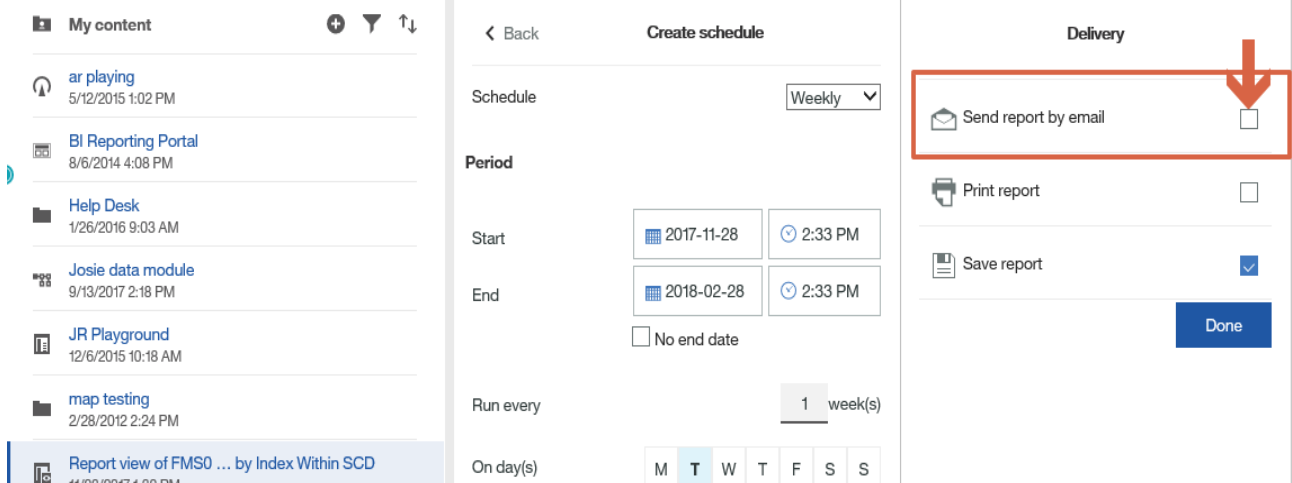
- A window will expand below that allows you to enter the options for the emailing request.
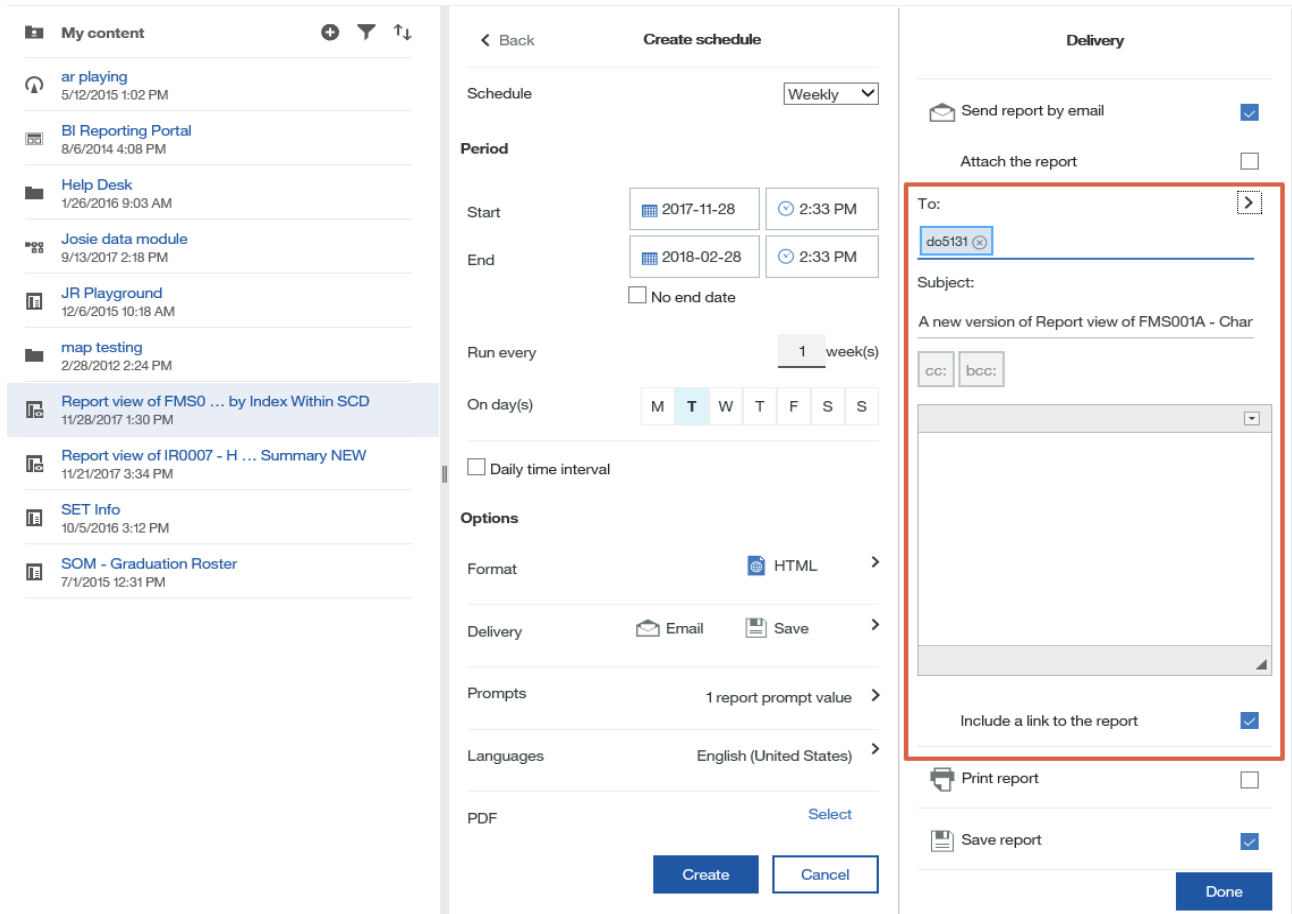
- You can manually enter email addresses or click on the arrow next to the TO to select email addresses.

- The subject line is pre-populated with the report name, but can be altered.
    - You can choose the **Include a link to the report** option by leaving that check box clicked. However, doing so will force the recipient to log into Cognos to view the output.

    - You can attach the report by clicking the **Attach the report** checkbox which will allow the report output to be attached directly into the email notification.

- Select **Done** to save the options and then **Create** to create the schedule.

- Note: You can **Disable** the schedule also. Just click on the **Enable** option to "off" (disable)

- Disabling it turns the schedule off but allows it to remain for future use.
- You can also permanently delete the schedule by clicking the **Delete** icon.
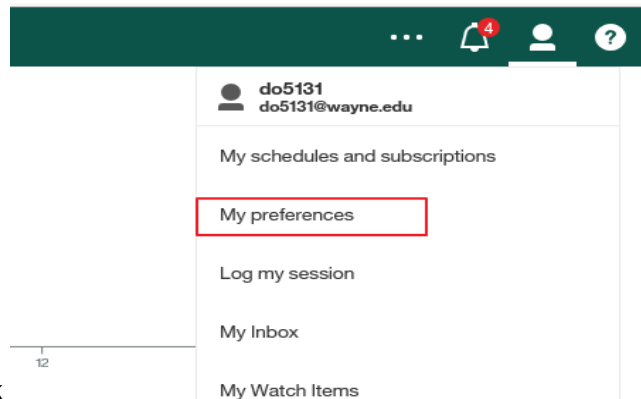
Important note:

When your windows/LDAP password is changed or reset, it is not automatically renewed in Cognos. This can cause problems with automatic report delivery as well as other issues.

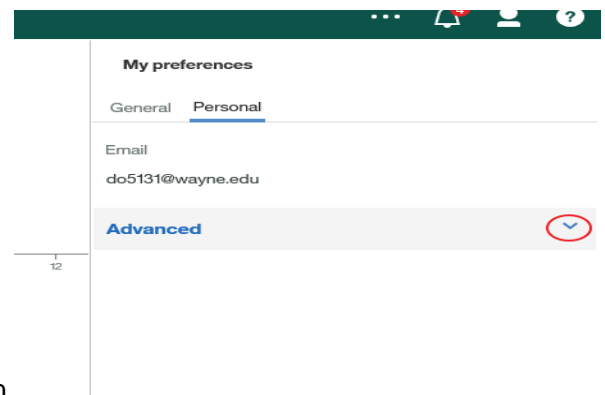To correct the issue please "Renew Your Credentials" in Cognos by following these steps:

1. Click on the "Person icon"

   do5131
   do5131@wayne.edu

   My schedules and subscriptions

   My preferences

   Log my session

   My Inbox

2. Then click on the "My preferences" link   My Watch Items

   My preferences

   General   Personal

3. Click on the Personal tab   Home page   Default

   My preferences

   General   Personal

   Email
   do5131@wayne.edu

   Advanced   ⌄

4. Then click the drop down arrow under the Advanced section

My preferences

General **Personal**

Email

do5131@wayne.edu

Advanced   ∧

Credentials   Renew

My credentials   Manage >

Groups and roles   View details >

My capabilities   View details >
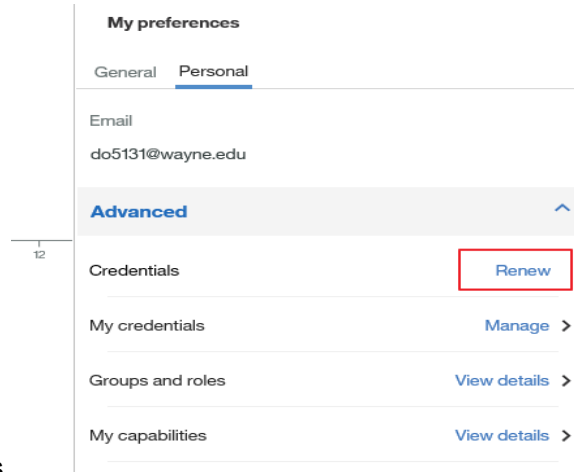
5. And click on "Renew" to Renew your credentials

You will see a notice that your credentials have been renewed with your current ID and Password.

➤ SCHEDULE MANAGEMENT

You may view and manage your scheduled reports using the Schedule Management feature. Use the options to view entries that are completed or presently scheduled.

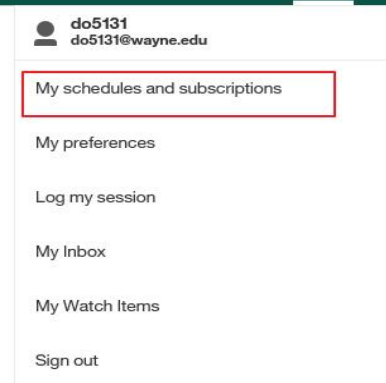You can also make changes on many reports, and see which reports are scheduled.
- Click on the **Personal Menu (little man) icon** in the navigation pane at the top of the page

SAMS Portal ∨
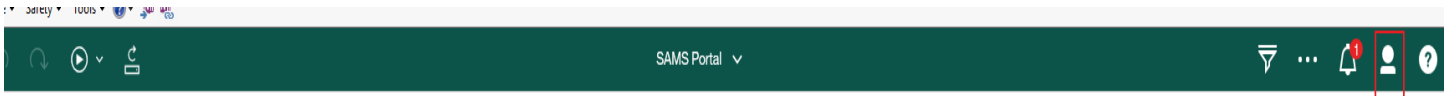
- Expanding this presents a list. Select the **My schedules and subscriptions.**

HIP AWARD MANAGEMENT SYSTEM (SAMS)
ation relating to the scholarship award process, thereby facilitating your ability to manage scholarship programs.

do5131
do5131@wayne.edu

My schedules and subscriptions

My preferences

Log my session

My Inbox

My Watch Items

Sign out

- A screen will be presented showing you the schedule, date modified, the scheduler, the status and priority.

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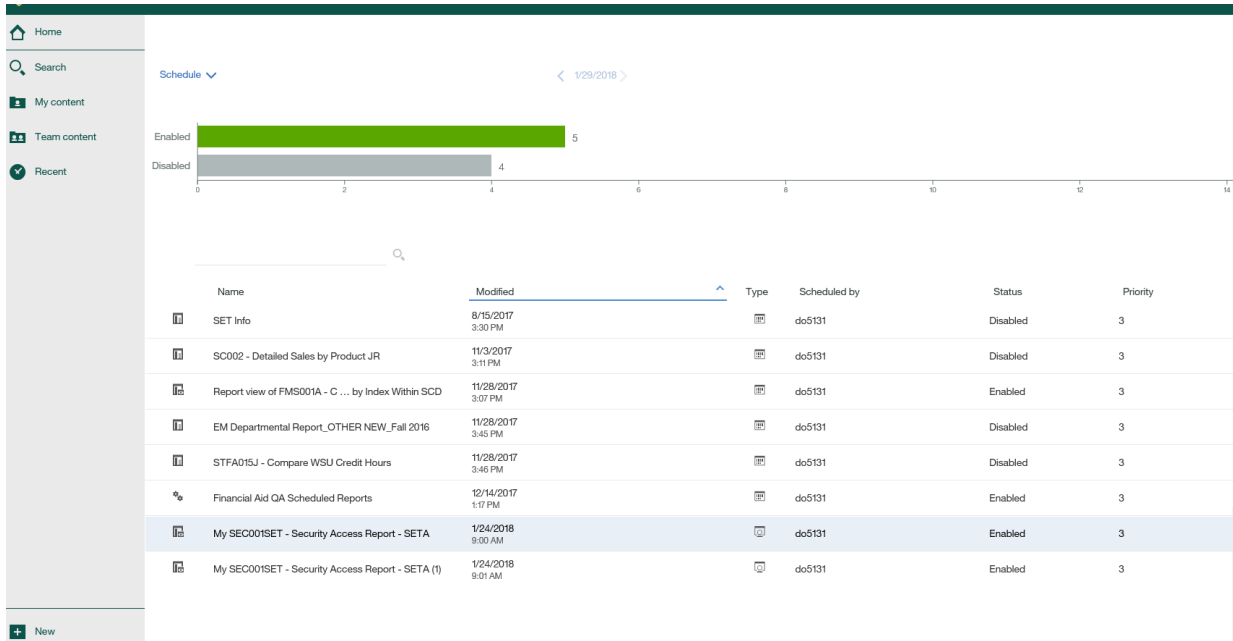
- If you don't see the report you're looking for, examine the filters you have selected under the **Filter** icon on the right .

Click any filtering items that you wish to change and click **Apply**.

- The list shows the entries that you selected.

- To perform an action on an individual entry, click the ellipses next to the scheduled item allowing you now to set properties, modify the schedule, and enable schedule and remove it.

➢ NAVIGATING WSU MAIN BI PORTAL

To access the BI portal log into Academica and select Business and Intelligence Reporting Portal

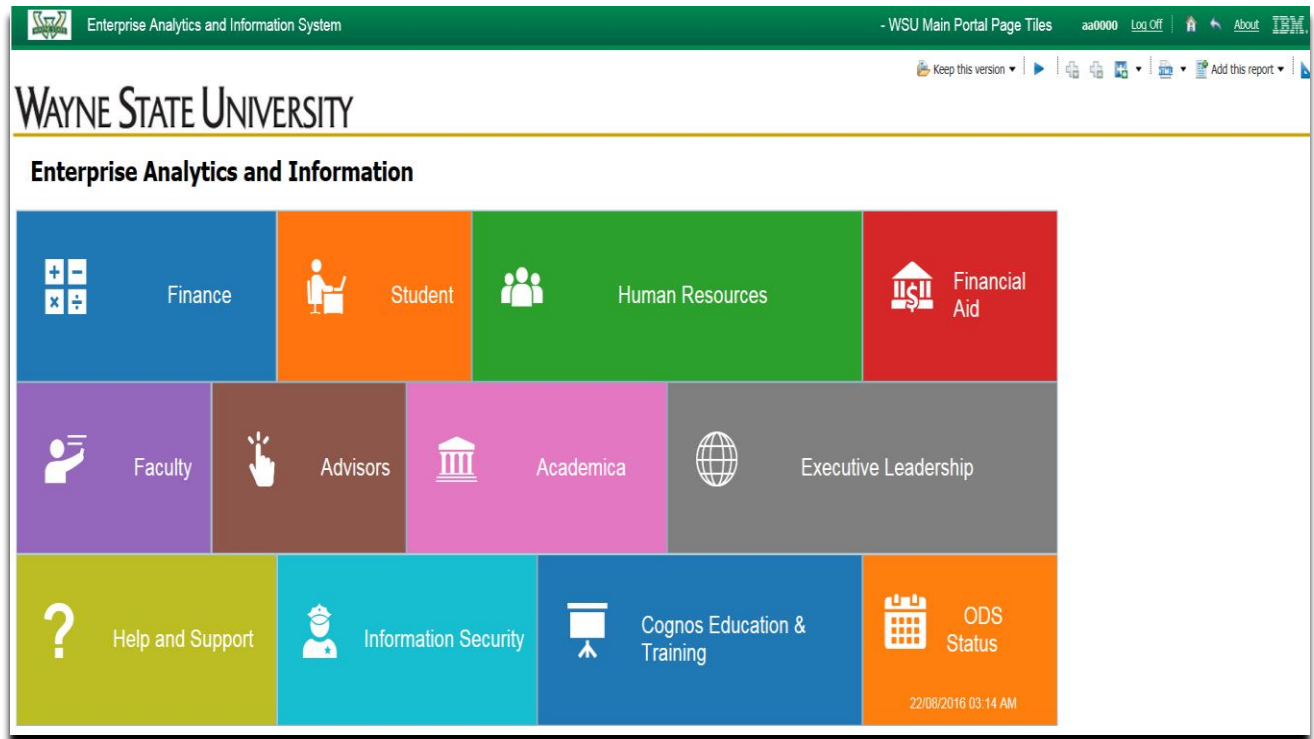This is the WSU MAIN PORTAL page. It contains links to various functions, reports, report list. Most information is defined by business areas, Finance, Student, etc. Also included is the status of the ODS and your security information. The data in the portal is secured by the various profiles. You will only see data you are permitted to see.
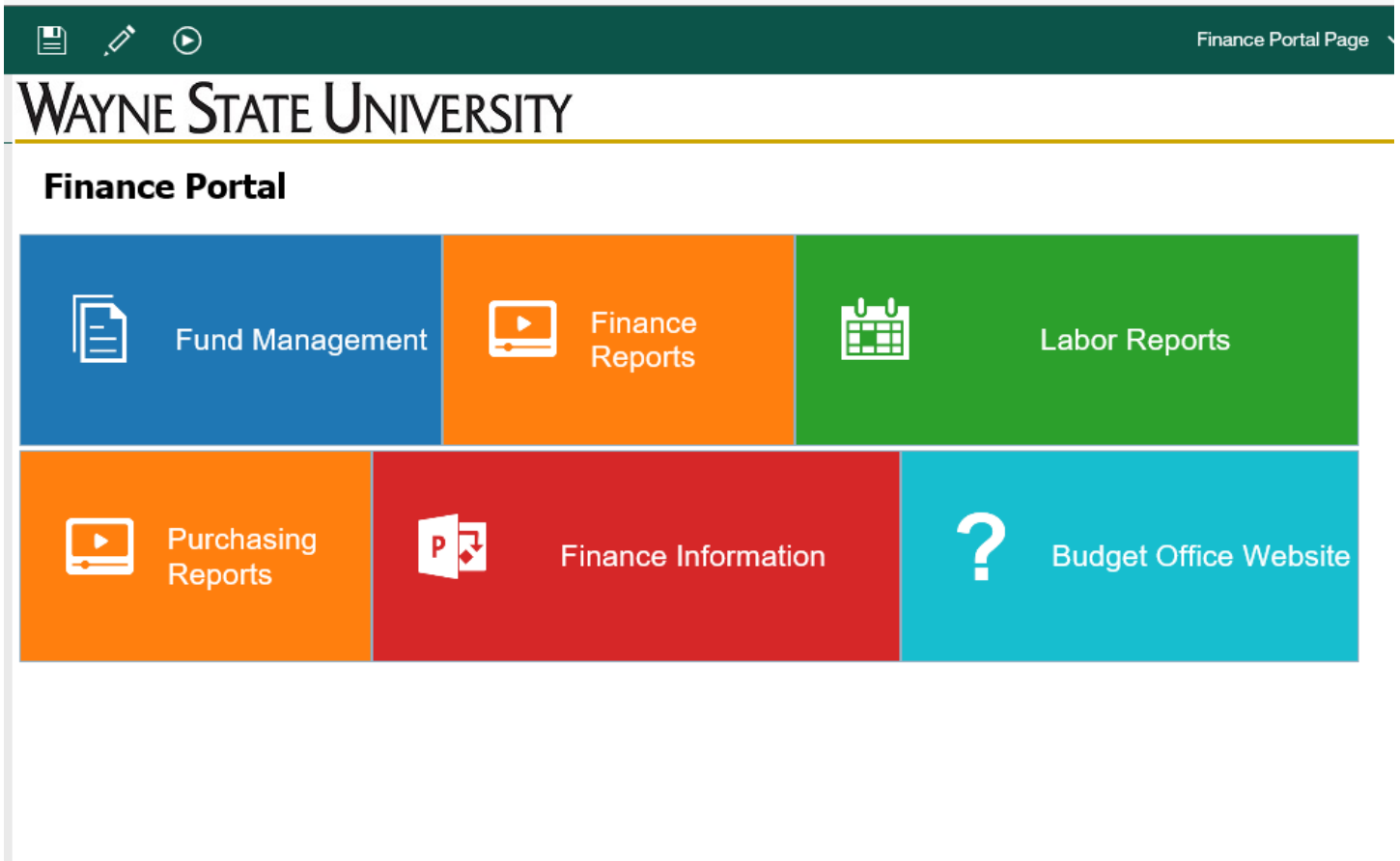
To navigate the WSU MAIN PORTAL:
- Select the Finance tile
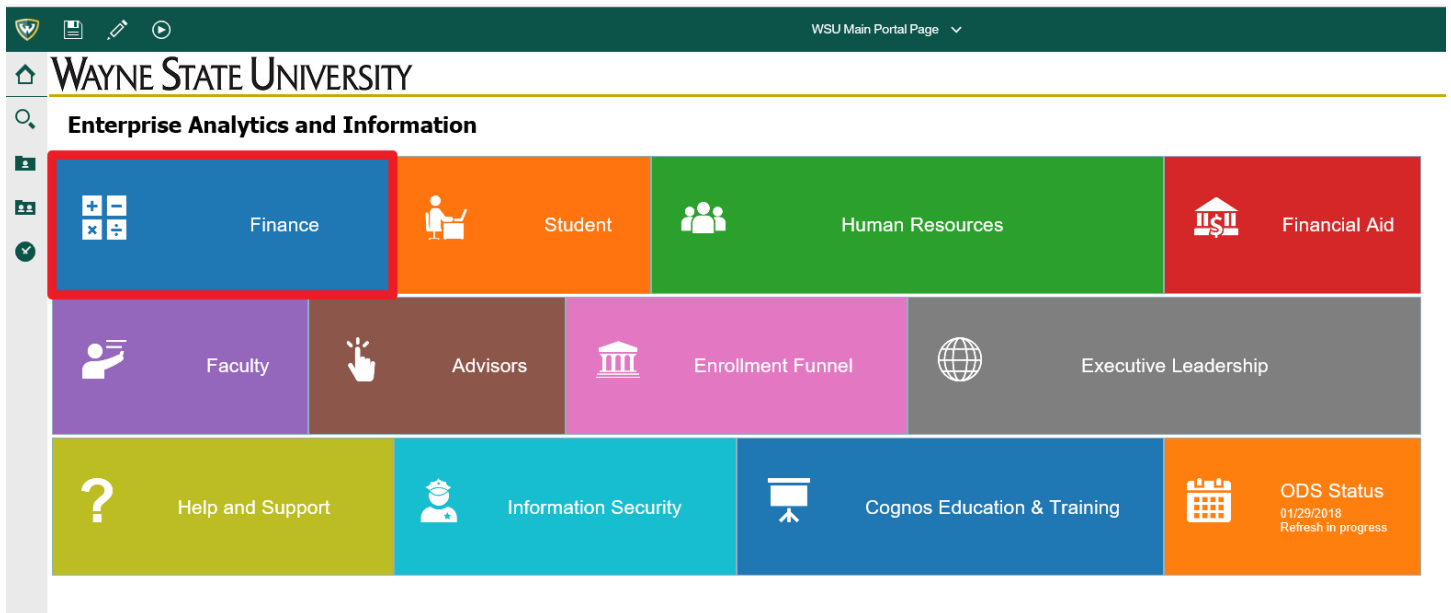
- You will be presented with the FINANCE PORTAL

- Select the Finance Reports Panel

- You will be presented with the FMS – Finance Report List

You are presented with a list of the most run reports, the Business Purpose.   You are able to run the reports by selecting the submit button. This will take you to the prompt page of the report:

- Select an SCD
- Select Finish

WAYNE STATE UNIVERSITY
Finance Management System

Finance.FMS001A
Chart of Indexes by Index Within SCD

Parameter Information:	
SCD	Mandatory: Select one or more school/college/division
HELP	Select Parameter names in 'Green' to access lookup list
	Asterisk (*) indicates required parameters.

Select SCD Rollup:

- 32E – Graduate School
- 37A – Government Affairs
- 37B - Office of the VP Community Affairs
- 37C - Federal Relations
- 39A - VP for Health Affairs
- 47IA - Internal Audit
- 48LR - Labor Relations
- 73A - Executive VP and Chief of Staff
- 73B - Chief of Staff Position Searches
- 73M - Administrative Operations
- 87A - VP Mrktng/Cmmnctns/Chief of Staff

Select all Deselect all

Cancel   Finish

You are presented a report in the PDF format.

Enterprise Analytics and Information System — FMS001A - Chart of Indexes by Index Within SCD   aa0000 Log Off   About   IBM

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WAYNE STATE UNIVERSITY
Finance Management System

Finance.FMS001A
Chart of Indexes by Index Within SCD

As Of:Aug 11, 2016
Time: 9:58:02 AM
Report ID: FMS001A

SCD Code: 32E – Graduate School   09R1 – Graduate School Dean's Office

Dept Level 5	Dept Level 6	Index – Index Title	Fund	Orgn	Prog	Grant	Mgr Last Name	PI Last Name	Proj Start	Proj End
09R11 – Graduate		137641 - Office Of The Gradua	111460	09R11	46		Walz	-		
		192271 - VCS 2MNI NIH 1DP7OD0	117G11	09R11	22	2MNI	Mathur	Mathur	20-Sep-2013	31-Aug-2018
		193015 - U/D-410469 25RIQ VCS	117G1C	09R11	22	25RIQ	Mathur	Mathur	1-Jul-2015	30-Jun-2016
		193153 - 25RVV VCS 410635	117G1M	09R11	22	25RVV	Mathur	Mathur	1-Jul-2016	30-Nov-2016
		193126 - MCS 23N711 State of	1181F6	09R11	11	23N71	Dunbar	Dunbar	1-Oct-2015	30-Sep-2016
		334116 - FCWS Grad School Dea	11A512	09R11	46		-			
		338559 - MUCWS Off of the Dea	11B512	09R11	46		-			
		146022 - Grad School, ICR	11D410	09R11	24		-			
		177318 - A Mathur Post Doc Of	11E420	09R11	24		-			
		220621 - Dean's Discretionary	120N1	09R11	46		-			
		220625 - Graduate School Scho	120N2	09R11	81		-			
		224040 - Postdoctoral Exhibit	13OI8	09R11	32		-			
		370191 - Martin Luther King C	23N5E1	09R11	11	23N5E	Dunbar	Dunbar	1-Aug-2015	30-Sep-2016
		370256 - State of MI Dept of	23N711	09R11	11	23N71	Dunbar	Dunbar	1-Oct-2015	30-Sep-2016
		370257 - State of MI Dept of	23N721	09R11	11	23N72	Dunbar	Dunbar	1-Aug-2015	30-Sep-2016
		410345 - UDM-Research Enhance	25RAG1	09R11	22	25RAG	Mathur	Mathur	26-Sep-2014	30-Jun-2015
		449225 - UDM-410345 Research	25RAG2	09R11	22	25RAG	Mathur	Mathur	26-Sep-2014	30-Jun-2015
		410469 - U/D-Research Enhance	25RIQ1	09R11	22	25RIQ	Mathur	Mathur	1-Jul-2015	30-Jun-2016
		449256 - U/D-25RIQ 410269	25RIQ2	09R11	22	25RIQ	Mathur	Mathur	1-Jul-2015	30-Jun-2016
		410635 - U/D-Research Enhance	25RVV1	09R11	22	25RVV	Mathur	Mathur	1-Jul-2016	30-Nov-2016
		449291 - U/D-Research Enhance	25RVV2	09R11	22	25RVV	Mathur	Mathur	1-Jul-2016	30-Nov-2016
		300825 - DOD018427A Wayne Sta	2MNI1	09R11	22	2MNI	Mathur	Mathur	20-Sep-2013	31-Aug-2018
		991188 - Graduate School Acti	9264	09R11	00		-			

1 of 2 -