

Cognos is a business intelligence tool that allows technical and non-technical users to analyze, extract, and create data reports.

Cognos Navigation Guide

Cognos Version 11.1.5

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Cognos Analytics Navigation
Consumer Training Guide

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Introduction

The purpose of this training guide is to familiarize users with the new interface of Cognos 11.1.5.

Data Security

In accordance with the Family Educational Rights and Privacy Act, access to students' records which contain confidential, individually identifiable information is available only for legitimate educational interest in the record. Accessed information may only be shared with school officials who also have a legitimate educational interest in the record. Releasing protected information to any unauthorized third party without the student's permission is a direct violation of Federal law. Questions related to student records privacy & FERPA should be directed to the Director of Academic Records & Registration at extension 2226.

Email Security

Record-level list reports which include sensitive information about individual students should only be shared with others through secure methods (a secure shared drive, saving the file to a flash drive) and should never be emailed. Examples of sensitive information include disability status, Social Security Number, and certain financial aid information such as EFC.

If using email options for report distribution, consider:

- Report content (FERPA, HIPAA, SS#, disability status, certain financial aid info)
- Report recipient's Cognos access

Report contains sensitive information. Best practice for all users with Cognos license.	
Include the link to report	Use this option for report to stay within Cognos for security reasons. Recipient will receive a link to the report and log into Cognos to view. Recipient must have access to Cognos.
	This is the most secure option to deliver a report.

Report does not contain sensitive information.	
Attach report	Use to attach output as email attachment.
	This option is less secure. Please consider sensitive information contained in report before using.

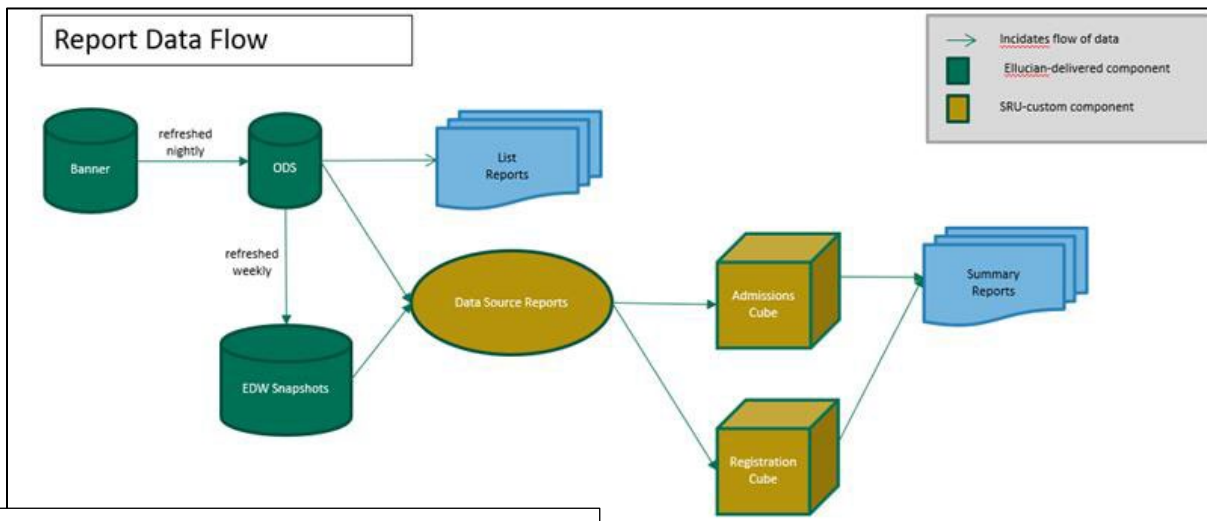
Cognos Overview

IBM Cognos Analytics is the starting point to access, view, or download business reports, analyze data, and monitor admissions, enrollment, and retention data.

There are generally two end-users at Slippery Rock University:

- **User (consumer)** – Users can enter Cognos to run reports that have already been prepared by a report writer. Individual roles will determine which folders and reports users are able to view and/or access.
Cognos report users access Cognos Analytics to run pre-written reports. The results can be exported into the following formats:
 - Excel
 - Excel Data
 - HTML
 - PDF
 - CSV
 - XML
- **Report Writer** – Users who create, write, and generate reports.

Data for Cognos reports comes from these sources.



- Banner Operational Data Store (ODS)
- Data loaded into ODS nightly.
 - Data is one day old.
- Banner Enterprise Data Warehouse (EDW)
- Transformed for freeze files – can come from multiple freeze dates.

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Accessing Cognos

Users must be on campus or connected via vpn.

Follow these steps to access Cognos:

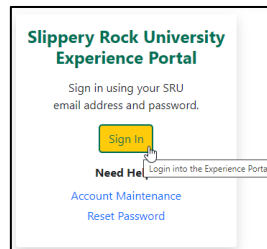
1. Open a recommended browser: Chrome, Firefox
2. Access via:
 - a. URL: <https://sis.sru.edu/ibmcognosprod>
 - b. MySRU: <https://mysru.sru.edu/>
 - i. Log in to MySRU and then navigate to All Links (screenshot below)
 - c. SIS splash page: <https://secure.sru.edu:8443/SisLinks/PROD>
 - i. User might need to copy paste this link to function.
 - ii. Navigate to Cognos [ODSP]

3. Sign in with SRU credentials.



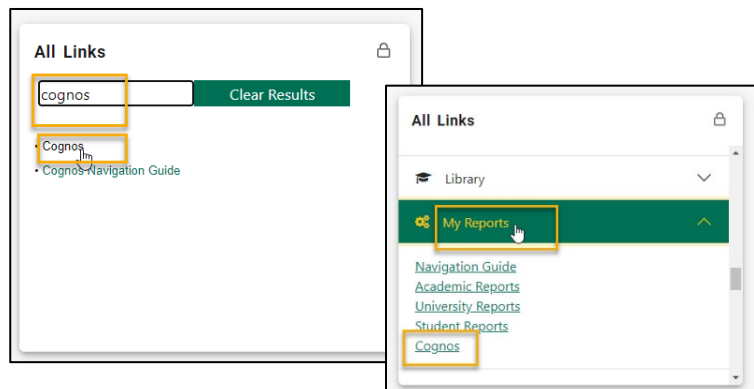
If accessing via MySRU.

1. Log into MySRU.



2. Navigate to the All Links tile.

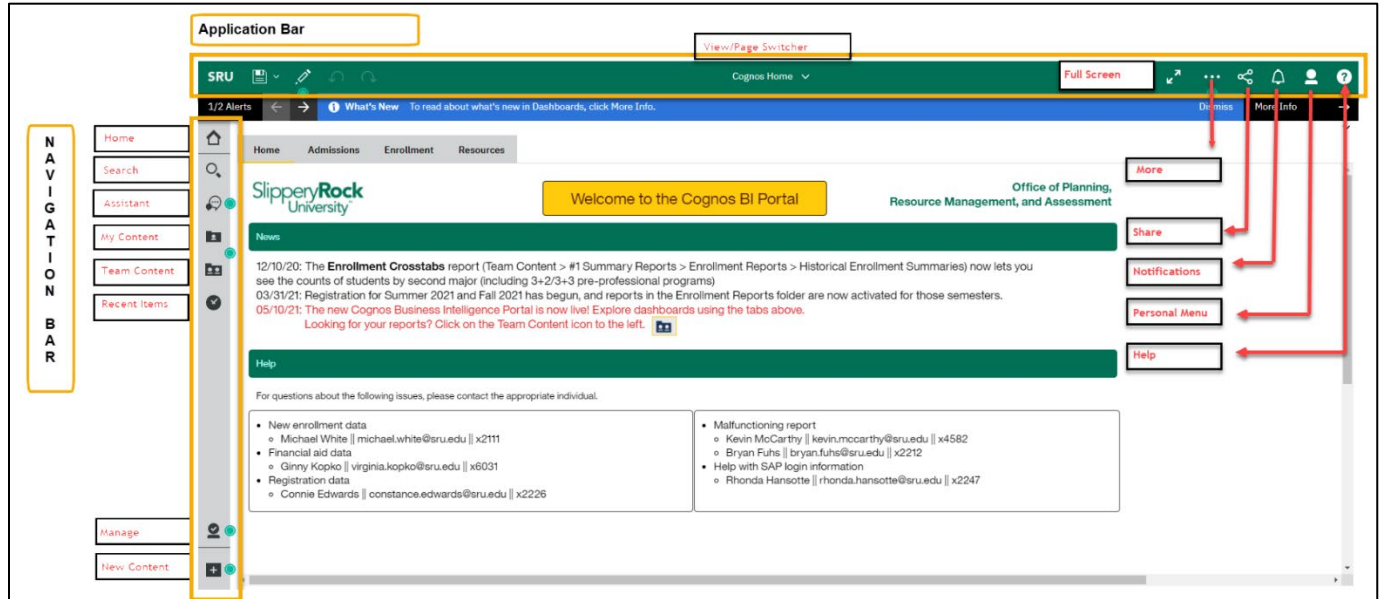
Enter Cognos into search bar or navigate to My Reports in the list and then to Cognos.



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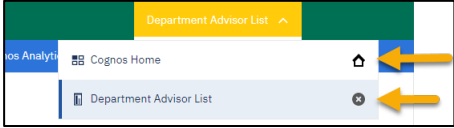
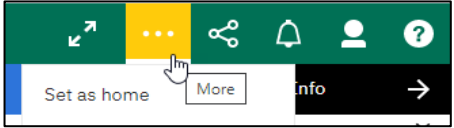
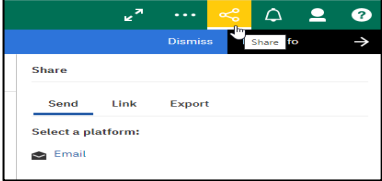
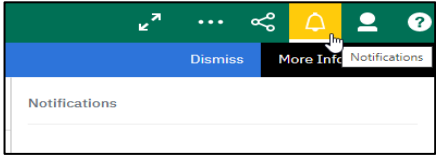
Main Portal Page

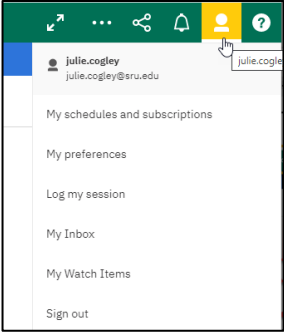
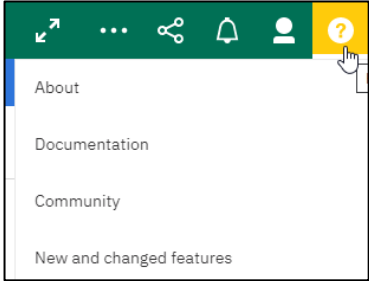
This is the home landing page in Cognos. The home page contains areas users will interact with to navigate, as well as news updates, contact information, and dashboard tabs.



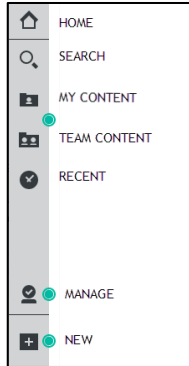
Application Bar

The application bar is the green bar across the top of the page. Based on permissions, icon visibility can vary.








	<p>View Page Switcher</p>	<ul style="list-style-type: none"> • Toggle between main portal page and any open reports. This example shows open Department Advisor List report. • Click House icon to go back to Main Portal Page. • Click X icon to close a report. Close will appear upon hover.
	<p>More</p>	<ul style="list-style-type: none"> • Capabilities dependent upon where user is in navigation or authoring. • Not generally recommended to set to home.
	<p>Share</p>	<ul style="list-style-type: none"> • Use to email report or copy link to report.
	<p>Notifications</p>	<ul style="list-style-type: none"> • Alerts user when subscribed reports are finished executing and available.

	<p>Personal Menu</p>	<ul style="list-style-type: none"> • Settings related to user. • Used to sign out of Cognos. • My Schedules & Subscriptions: <ul style="list-style-type: none"> ○ Based on user selections. • My Preferences: <ul style="list-style-type: none"> ○ Report Format: <div data-bbox="943 579 1161 829" style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>My preferences</p> <p>General Personal</p> <hr/> <p>Home page Default</p> <p>Show hidden entries <input checked="" type="checkbox"/></p> <p>Report format HTML</p> <p>Turn on accessibility features <input type="checkbox"/></p> <p>Show hints <input checked="" type="checkbox"/></p> </div> <p>Choosing a default report format will only override a <i>default</i> Cognos format. It will not override a report specific format set by the IR team.</p> <ul style="list-style-type: none"> ○ Show Hints: uncheck to turn off. • Additional settings not typically changed.
	<p>Help</p>	

Navigation Bar



Note: Hover over icon objects to display descriptions.

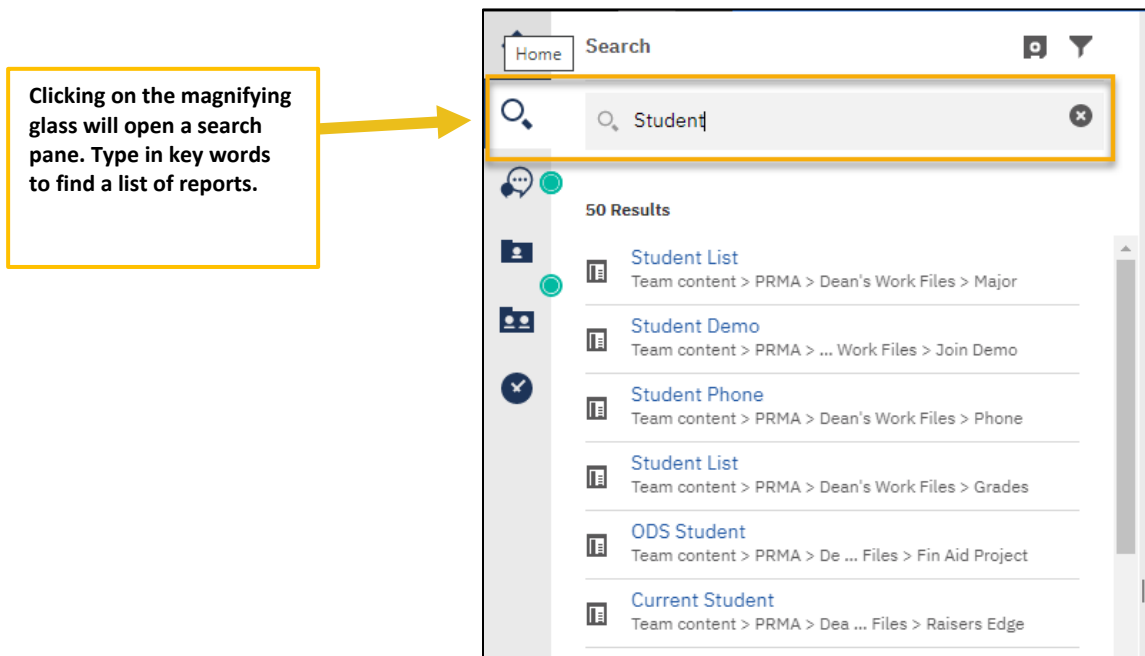
	Search	<ul style="list-style-type: none"> • Search for reports by keywords. • Save a search by clicking on the Save Search Icon at top right of Search Bar. 
	My Content	<ul style="list-style-type: none"> • Contains My Content folders.
	Team Content	<ul style="list-style-type: none"> • Contains Team Content folders.
	Recent	<ul style="list-style-type: none"> • Contains recently viewed reports and/or dashboards.
	Manage	
	New	<ul style="list-style-type: none"> • Authors only role - to create a new report.

Accessing Reports

Users will see a new interface with the upgrade from Cognos 10 to Cognos 11.1.5. This section will cover what was in the previously named My Folders (now My Content), Public Folders (now Team Content), and Splash Page (discontinued).

Search Bar



Access via Navigation Bar.



My Content/Team Content

(formerly My Folders/Public Folders)

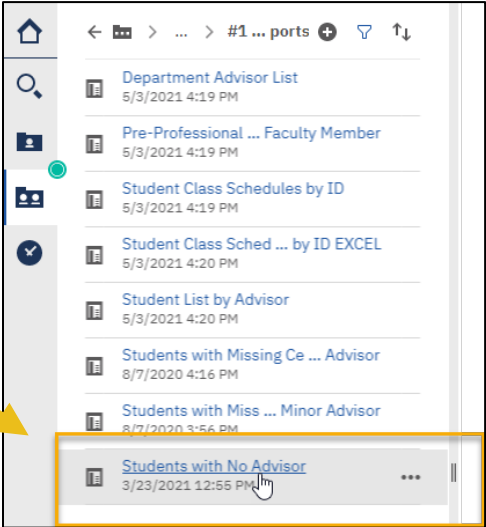
Access via Navigation Bar.

	
My Content	Team Content
Formerly My Folders <ul style="list-style-type: none"> • Contains items only viewable by the user. 	Formerly Public Folders <ul style="list-style-type: none"> • Contains reports previously housed on splash page. • Contains standard reports & departmental folders and reports. • Item views are based on security roles.

Running Reports

Select a report to run via Search Bar, Team Content, or My Content.

This example uses the Team Content Folder to select the Students with No Advisor report.

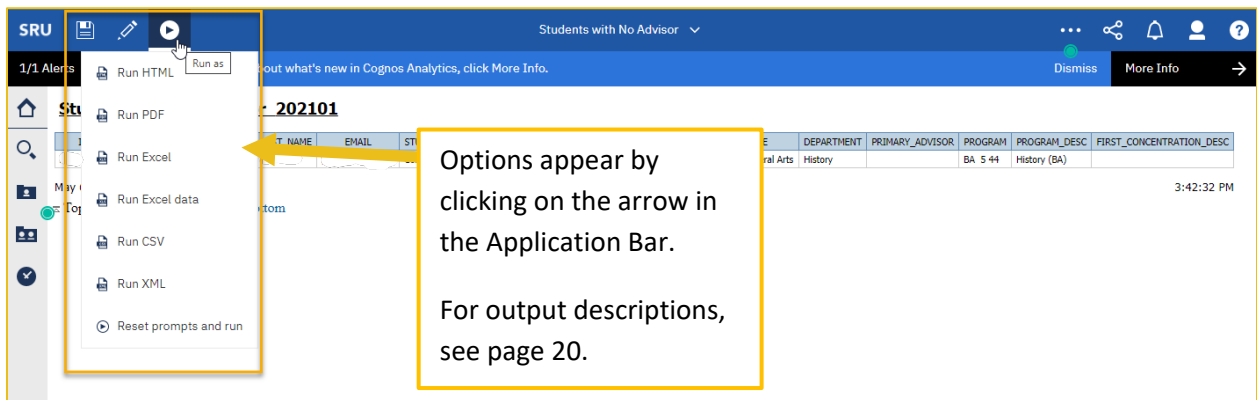


Prompts

Many reports will display a prompt page once the request is sent. Prompts can be required or optional. Required prompts display with a red asterisk (*).

Report Output

The report will run and display output within the same window. After seeing the report, users can select output.

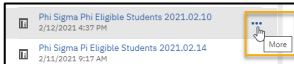


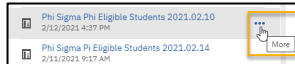

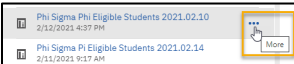




Options appear by clicking on the arrow in the Application Bar.

For output descriptions, see page 20.

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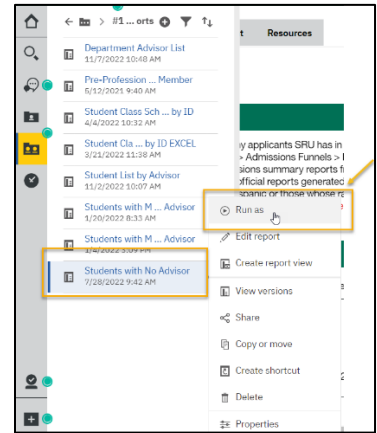
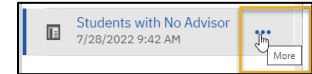
Shortcut/Copy/Report View

	Shortcut	Copy	Report View
Relationship to original report	<p>A shortcut is a link to the original report.</p> <p>Any changes to the original will also show in the shortcut.</p> <p>If an original report is deleted, the shortcut will be broken.</p>	<p>A copy is independent to the original report.</p> <p>Any changes to the original will not show in the copied report.</p> <p>If an original report is deleted, the copy will not be affected.</p> <p>Not recommended.</p>	<p>A report view acts like a combination shortcut/copy. Any changes to the original report will also show in the report view.</p> <p>If the original report is deleted, the report view will be broken.</p>
Create	<p>From Team/My/Recent content, hover over report title to display more, click and select Create shortcut.</p>  <p>After shortcut is created, report will display with  icon.</p> 	<p>From Team/My/Recent content, hover over report title to display more, click and select Copy or move.</p>  <p>After copy is created, report will display with a (number) after title.</p> 	<p>From Team/My/Recent content, hover over report title to display more, click and select Create report view.</p>  <p>After report view is created, report will display with  icon.</p> 

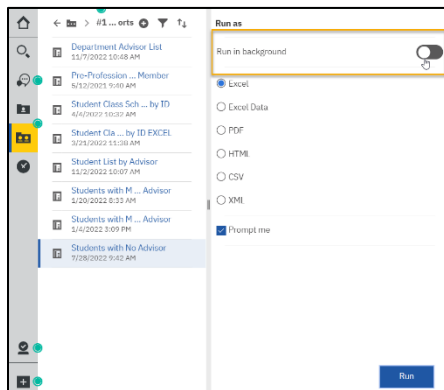
Run in Background

The user can select to run a report in the background.

After selecting report, click on the ellipsis to the right of title to open menu, then select "Run as".

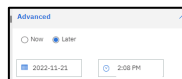


After clicking on "Run as", a new menu will open and the user will see an option to toggle "Run in background" to on.



After "Run in background" is toggled to on the user will be able to choose:

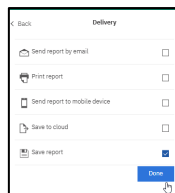
Select file output
Advanced (click ^ to open menu)



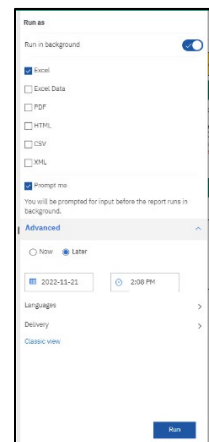
Now/Later: Run now or toggle "Later" to on

to select a date and time.

Delivery (click ^ to open menu)



Choose method of delivery.



Schedules and Subscriptions

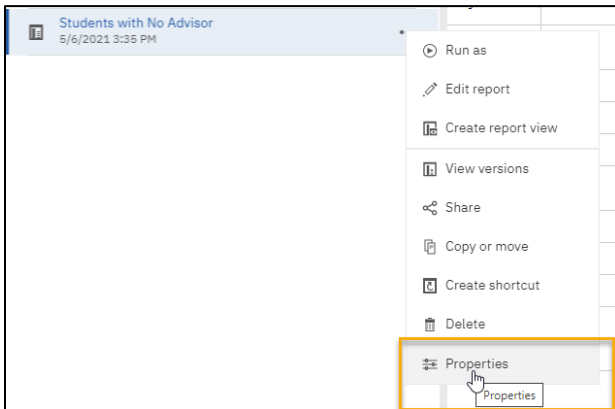
Schedules

Users can schedule a report to be run later or at a recurring date/time. The report delivery is based on selection in schedule. It is a best practice to not schedule multiple reports to run at the same day/time. Please schedule in 15-minute intervals. If scheduling reports containing sensitive information, do not email.

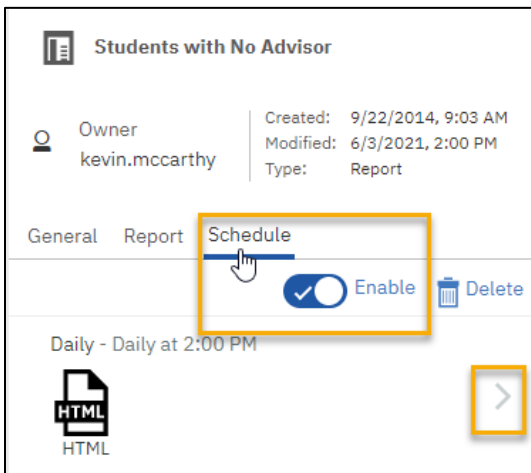
1. Navigate to the report and choose More.



2. Click on More and navigate to Properties.



3. Click on Properties and navigate to Schedule. Make sure enable is toggled on.



4. Click on the arrow to the right of report output. This will open a pop up window to select various settings for period, format, delivery, prompts. After choosing settings, click update to save.

< Back Update schedule

Schedule Daily

Period

Start 2021-06-01 2:00 PM

End 2021-06-03 2:15 PM

No end date

Every 1 Day(s)

Daily time interval

Options

Format HTML

Delivery Email Save

Prompts Set values

Languages English (United States)

PDF Select

Classic View

Update Cancel

5. Modify or delete a schedule.

A schedule can be modified by navigating to Personal Menu and then to My schedules and subscriptions. Users will see a list of scheduled reports and after clicking on . . . on far right, select modify the subscription from drop down menu. Choose remove this subscription to delete.

Name	Modified	Type	Scheduled by	Status	Priority
> My Students with No Advisor	5/20/2021 3:09 PM		julie.cogley	Enabled	3
> My Students with No Advisor (1)	5/27/2021 11:42 AM		julie.cogley	Enabled	3
> My Students with No Advisor (2)	5/27/2021 1:18 PM		julie.cogley	Enabled	3

Run once

Modify this subscription


View versions

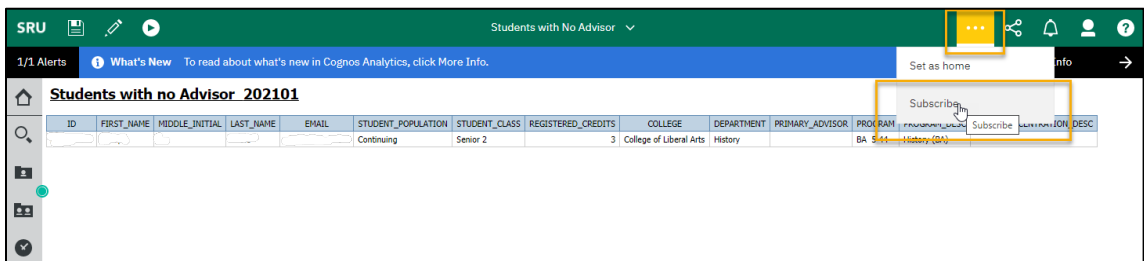
Disable this subscription

Remove this subscription

Subscriptions

Users can schedule reports to run on recurring dates/times. With subscriptions, users can set the time, date, format, and delivery destination. Subscriptions include prompt and parameter values.

- Run a report. After the report is presented in the report output view, navigate to the application bar.
- From the application bar, click , then click Subscribe.

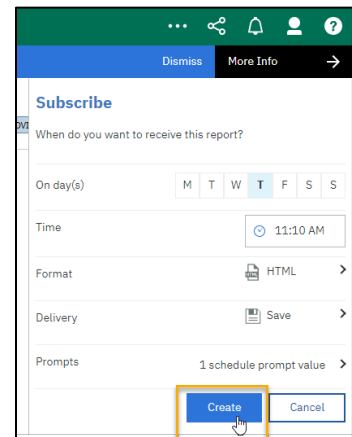


- Select subscriptions options and click Create. The subscription saves any prompts from the initial run.

User can choose:

- day/s report is received (days will be in bold),
- time,
- report format,
- and delivery method.

Selecting Prompts will display values chosen when report was initially run.



- Modify or delete a subscription.

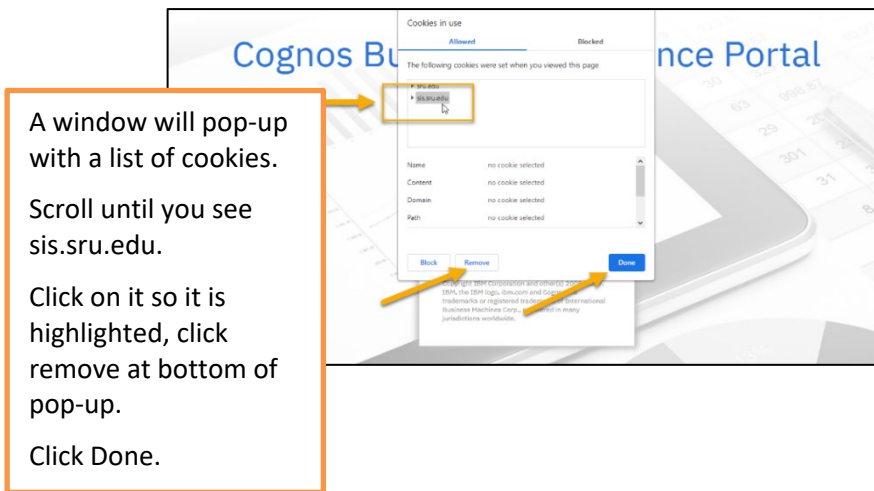
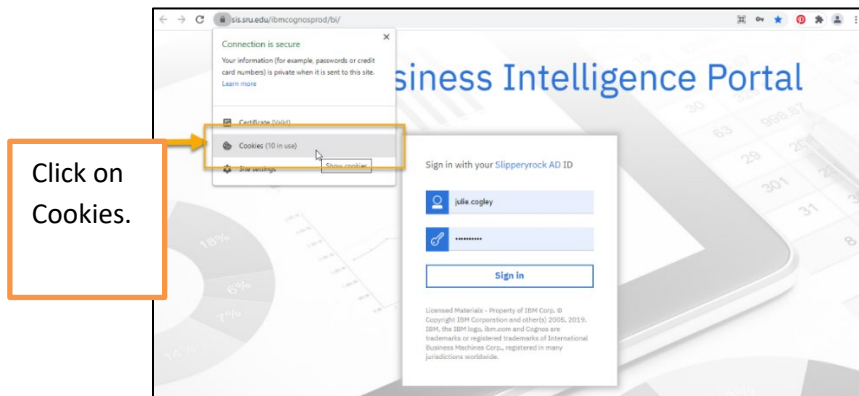
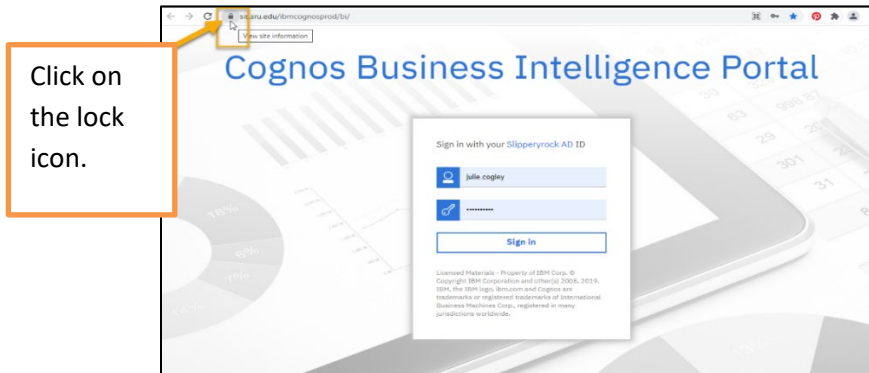
A subscription can be modified by navigating to Personal Menu and then to My schedules and subscriptions. Users will see a list of subscriptions and after clicking on . . . on far right, select modify the subscription from drop down menu. Choose remove this subscription to delete.



Known Issues

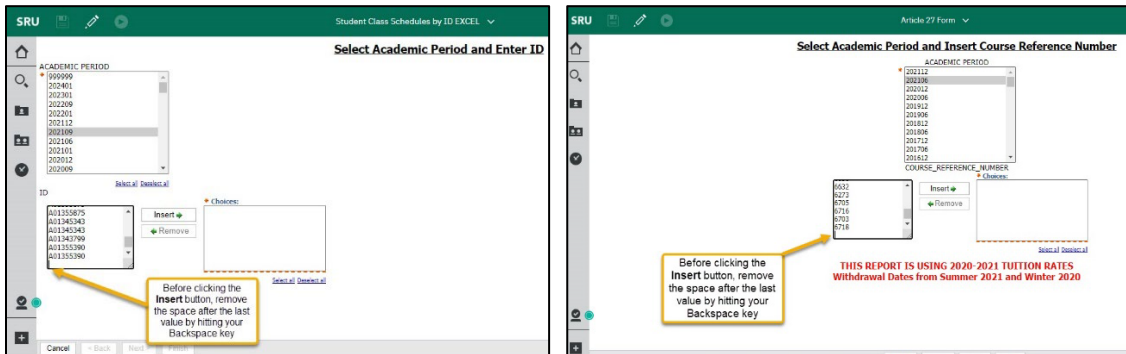
As with any upgrade, there will possibly be issues the migration team is not aware of. Please report any issues encountered to kevin.mccarthy@sru.edu. The following lists issues users might encounter.

1. Cookie Issue Reset



2. Copy/Paste ID or CRN Numbers

When copy/pasting ID or CRN numbers into prompts, be certain there are not spaces after last entry. Before clicking insert button, remove any space left after the last value by hitting backspace key.



3. Report Formats

Some report formats did not copy over faithfully from Cognos 10. As we become aware, the IR team can update the settings on reports.

4. Dashboard Render

If the home page does not render properly, refresh browser to reset.


5. Request Header Fields Too Large

Clear browser cache or clear cookies.

6. Whitelabel Error Page (Firefox)

Manually enabling and disabling DNS-over-HTTPS

You can enable or **disable** DoH in your Firefox connection settings:

- Click the menu button  and select Settings.
- In the *General* panel, scroll down to *Network Settings* and click the Settings... button.
- In the dialog box that opens, scroll down to *Enable DNS over HTTPS*.
- **On:** Select the **Enable DNS over HTTPS** checkbox. Select a provider or set up a custom provider ([see below](#)).
- **Off:** Deselect the **Enable DNS over HTTPS** checkbox.

Do not prompt for authentication if password is saved

Proxy DNS when using SOCKS v5

Enable DNS over HTTPS

Use Provider Cloudflare (Default)

OK Cancel Help

Report Output Descriptions

HTML	<ul style="list-style-type: none"> • Web based and designed for viewing report output on-screen. • If report contains tabbed layouts, all pages will be displayed and accessible.
PDF	<ul style="list-style-type: none"> • Used for printing and distributing output in Adobe Acrobat Reader. • You must have administrator privileges to specify the advanced PDF options. • Each page in a tabbed layout report will render its own page.
EXCEL	<ul style="list-style-type: none"> • Previously named Excel 2007 Format • Supports lists, crosstabs, icons, titles, subtotals, totals, and charts. • Each page of a tabbed layout will render as its own worksheet in Excel.
EXCEL DATA	<ul style="list-style-type: none"> • Report formatting (titles, charts, icons, subtotals, totals, etc.) are dropped and data is returned in spreadsheet format (like CSV file). • Only the first page of tabbed layouts will appear. • If the first page of the report contains more than one report object (list or crosstab), only the first object is displayed.
CSV	<ul style="list-style-type: none"> • Export data which is tab-delimited and can be imported to (or read by) other software. • Strings are not enclosed in quotation marks. • CSV exports show only the results of the report query. • Page layout items, such as titles, images, totals, and subtotals, etc., do not appear. • Only the first page of tabbed layouts will appear. • If the first page of the report contains more than one report object (list or crosstab), only the first object is displayed.
XML	<ul style="list-style-type: none"> • XML report outputs save the report data in a format that conforms to an internal schema, xmldata.xsd. • Useful if you want to use a report as a data source for another report.