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I. Accessing Cognos

A Cognos user can log in using one of these three options: MyCharleston (my.cofc.edu, Employee or Finance tab), a link located on the Business Intelligence website (http://it.cofc.edu/bi) or by typing the link to the Cognos site in directly to the browser’s address bar (reporting.battery.cofc.edu).

MyCharleston

From either the Finance tab or the Employee tab, a Cognos user can log in using the link available on either tab.

Employee tab

From the Employee tab, the Cognos login link is located in the center column in the Cognos channel, located directly above the Cougar Trail for Employees channel.
**Finance tab**

On the Finance tab, the link is located in the center column within the Finance Reports channel.
Business Intelligence Website
From the Business Intelligence (BI) website, one can click on the “Cognos Access” link located in the menu when on campus.
Access through Cognos Consumer SharePoint site

You can access Cognos additionally through the Cognos Consumer SharePoint site available to all Cognos Consumers and Authors (http://society.cougars.int/departments/infomgmt/consumers/default.aspx). In the Links section on the right hand side of the screen, there is a link for Cognos Access, along with several other links available to Consumers.

Please note this is a secure website and can only be accessed from on the College’s campus. When logging in to the site, please type “cougars\" prior to your username.
**Type link into browser**

Open your preferred browser and type in this link, reporting.battery.cofc.edu, into the address bar. You can do this one time, and then add it to your favorites for future use. Internet Explorer 11 and Google Chrome have various issues with functionality within Cognos 10.2. Mozilla Firefox is the preferred browser.

**Internet Explorer**

Internet Explorer can be used from PCs.

Add address bar into which the link should be typed

To add this site to the favorites in Internet Explorer, simply click on the star to the right corner, just under the “X” used to close the browser.

IE v11, adding a favorite

Click on “Add to Favorites” and a pop-up window opens. Change the name/location of where to save the link, if desired.

IE v11, favorites pop-up window

If you are logging in using Internet Explorer, please make sure you modify your security settings to allow for full functionality. This includes turning off your pop-up blocker. You can follow these instructions by clicking here or going to the BI website and clicking on the “Additional Documentation” link from the menu.
**Mozilla Firefox**

Mozilla Firefox can be used on a PC or a Macintosh computer. Firefox is the preferred browser for best user experience with Cognos 10.2.

![Mozilla Firefox log on](image)

*Address bar into which the link should be typed*

To add this site to the Mozilla favorites, simply click on the Bookmarks drop down menu and select “Bookmark this Page”. You can also click the Ctrl + D keys to bookmark it in Mozilla.

![Firefox, adding a favorite](image)

**Google Chrome**

With the release of Cognos 10.2, Google Chrome is now an approved browser on PCs.

![Google Chrome log on](image)

*Address bar into which the link should be typed*

To add this site to the Google Chrome bookmarks, simply click on the gold star on the right end of the address bar. You can also click on the menu, select “Bookmarks” and “Bookmark this Page” from that menu.

**Safari**

With the release of Cognos 10.2, Safari is now an approved browser on Macs.
II. Logging In

To log in to Cognos, simply use the Cougars log in. That is the username and password combination used when logging into the computer to start up or unlock; it is also the username and password combination used to log in to MyCharleston.

![Cognos Log-in screen](image)

Notice the Namespace is AD, for Active Directory. That Namespace indicator is important for troubleshooting if you are having problems logging in.
Changing the Cougars password

Every 90 days, the College of Charleston policy is users must change their passwords for their Cougar accounts. This is the password used to log in to your computer, check e-mail and log in to MyCharleston, as well as the one used to access Cognos. While the log in for Cognos does recognize your new password, the Cognos system requires users to update their credentials. See the Setting My Preferences/Personal Tab section of this “How To” guide for relevant instructions on how to update your credentials in Cognos.
### III. The Welcome Screen

IBM Cognos has a Welcome Screen which looks like the screenshot below. Depending on the access for your license, you may or may not see the same icons under My Actions and Administration as are depicted in the screenshot.

![Welcome Screen](image)

<table>
<thead>
<tr>
<th>My Content</th>
<th>My Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Home</td>
<td>Create workspaces on the web</td>
</tr>
<tr>
<td>IBM Cognos content</td>
<td>Author business reports</td>
</tr>
<tr>
<td>My Inbox</td>
<td>Query my data</td>
</tr>
<tr>
<td>Administration</td>
<td>Analyze my business</td>
</tr>
<tr>
<td>Administer IBM Cognos content</td>
<td>Author advanced reports</td>
</tr>
<tr>
<td></td>
<td>Manage my events</td>
</tr>
</tbody>
</table>

You will see both a “My Home”, an “IBM Cognos content”, and “My Inbox” under My Content. You will also see a checkbox for “Show this page in the future” in the bottom left. At the top right of the Cognos frame—bordered by dark green in the screenshot above—you can see your username and a link to Log Off.

Click the green check box to UNCHECK the “Show this page in the future”. This screen can be accessed again by checking a box under the My Preferences tab once you are logged in. See the [Setting My Preferences](#) section of this “How To” guide for relevant instructions.
By Default, the “My Home” and “IBM Cognos content” take a user to the same place, the Public Folders tab in Cognos. Once the Home page for a user has been changed and the “Show this page in the future” box is unchecked, when the user logs in to Cognos, he/she is automatically taken to the designated home page. If the “Show this page in the future” box is not unchecked, the user has the choice of selecting “My Home” or “IBM Cognos content”. To change your home page, see the My Home section of this “How To” guide for relevant instructions.
IV. The Cognos Connection Basics

The Cognos Connection is the interface for the end users while in Cognos. There are several areas within the Cognos Connection with which users should familiarize themselves. There are the Tabs, the Actions section and the folders and packages themselves.

Packages and Folders

Cognos provides delineation between Packages and Folders.

Packages

A package is the tool that Report Authors use to write reports. Consumers have no need to use a package, and therefore cannot see them. Packages look like an orange box with string tied around it. Consumers do not see packages in their interface since they do not use them.

Folders

A Folder is where the Report Authors will publish reports for Consumers to use. Folders are yellow and look just like folders in Microsoft Windows.

Folders are organized by functional area – Student, Finance, Admissions, etc. Permission to each folder is granted by Data Owners. If you do not see a folder for an area to which you think you should have access, please follow the instructions under the Submit a Request section in this user guide.

Each main folder can have subfolders, as well. Under each main folder (Finance, Student, etc.), there are end user reports, as well as back office reports. Those reports are separated into subfolders and security is applied to allow for appropriate access. Active Directory groups are used to apply security.
**Tabs**
There are two tabs by default in Cognos. The Public Folders tab and the My Folders tab.

![IBM Cognos Connection](image)

**Tabs and Breadcrumbs**

Upon initial login, the Public Folders is set to be the home page and the My Folders tab is empty. To change your home page, see the [Change Your Homepage](#) section of this “How To” guide for relevant instructions.

Directly underneath the Tabs are *breadcrumbs* to help the end user navigate within the Cognos Connection. In the screenshot above, the user is on the Public Folders tab, in the yellow Student Folder and in the Academic Administration Reporting subfolder. A user is able to click on any of the sections of the breadcrumbs with an underline. Those sections, the Public Folders and Student in the example above, are hyperlinks and will take the user to that location.

**Public Folders**
The Public Folders tab is where report authors will publish reports for end users to run. Given access to a specific folder, a consumer can run any report contained in that folder. Access is based on security as approved by the data owners. For more information on security within Cognos, see the [Security](#) section of this “How To” guide for details.

The folders on the Public Folders tab are organized by data type: Student, Finance, Financial Aid, Human Resources, etc. Data Owners for each area grant users access to those folders and all reports within each folder. If you need access to a folder you do not see, please fill out a Cognos license request and select the appropriate area: Student for reports about majors, grades, course rosters, etc.; Faculty for reports about faculty sabbatical, tenure, etc.; Employee for HR or Payroll reports; or Course for course listings, times, locations, etc.

**My Folders**
The My Folders tab is blank by default and enables the end users to create an organizational structure of reports from the My Folders tab. Reports can be organized by area, frequency of need, functionality of report, or whatever purpose the end user finds most beneficial to him/her. No one else has access to the My Folders tab. End users are encouraged to create shortcuts to report folders from the Public Folders. To create a shortcut, please see the [Creating a Shortcut](#) section of this “How To” guide for relevant instructions.
My Home
Cognos allows each end user to create his/her own custom home page. This allows the user to easily indicate their most often accessed folder. This could be a home page set to the My Folders tab or a particular area, such as Student or a subfolder in Student.

1. To modify your home page, simply navigate to the location of your choice.
2. Click on the drop down next to the home icon in the top right corner of the Cognos frame.
3. Select “Set view as home”.

Once this is set up, you can click on the home icon any time you are lost in Cognos. When you log back in to Cognos the next time, it will automatically take you to this new Home location.

You can change the home page as often as you want.
**Setting My Preferences**

Each user has the ability to modify his/her preferences. Each time you change your Cougars password, you will need to update your credentials on the Personal Tab in My Preferences. Additionally, personalization for your Cognos interface can be set to include how many items the user sees on each page and modifying the appearance by adding alternating backgrounds or grid lines, as well as changing the color scheme.

1. To access the My Preferences option, select the My Area icon drop down menu.
2. Click on the My Preferences option.
3. There are three tabs within the Set Preferences screen: General, Personal and Portal Tabs.

---

**General Tab**

The General Tab is the location to modify the aesthetics of the Cognos interface. You can change the color scheme, the number of items you see on a page, the way the icons are listed (icons or in a vertical listing). This is also where you can go to get the Welcome Screen back.
Changing Number of Entries in List View
To modify how many items you see listed on each page, you may need to change the number 150. This will ensure you see all of the folders to which you have access, as well as all of the reports contained within a folder without having to scroll through pages using the next page feature.

Report Format
There is an option to modify the report format from HTML. This is a global setting for all reports you will run. Please leave this as the default HTML. This will allow the report author to format the report for printing purposes. Please see the Run with Options section of this “How To” guide for relevant instructions. HTML will return the results more efficiently. If there is a report you kick out to Excel often, you can modify a specific report format.
Show the Welcome Page at Startup
To get the Welcome Screen back after it is disabled—we disabled it by unchecking the green checkbox on the Welcome Screen upon our initial login—simply click in the checkbox here to Show the Welcome page again.

Show a Summary of the Run Options
Leave this checked. It allows you to see the options you selected when using the Run with Options feature, discussed later in the Run with Options section of this “How To” guide. It shows the answers to the prompts you selected, the format for output and whether you saved the file, including the location, and if you selected to e-mail it.
Modifying the Separators in List View:
To help guide your eyes across the screen of the Cognos Connection, Cognos gives you three options. You can either select No Separator, select Alternating Backgrounds, or Grid Lines.

Alternating Backgrounds will give you grey and white alternating backgrounds.

Alternating Backgrounds

Selecting Grid Lines will give you grey lines after every item.

Grid lines

Or you can leave the space white by selecting No Separator. This is the default setting.

No Separator

Using either the alternating backgrounds option or the grid lines option is encouraged.
Modifying the Style

Cognos has six (6) options for “Style”. To select a Style, click on the dropdown and select an option. Then click the “Preview” link to see what that option will look like. Here are two examples.

**Business Style**

![Business Style screenshot]

**Modern Style**

![Modern Style screenshot]

When you are finished previewing a style, click on the close button in the bottom left of the screen, as seen in the above screenshot called *Modern Style*. 
**Portal**

A change from Cognos 8, there are no views that allow you to see icons. The two options, List and Details, are essentially the same. You can toggle between the two options either in the Portal section of the My Preferences page or using the toolbar in the main Cognos Connection frame.

*Available options for selecting Cognos Connection views*

If you select the *List* option, you will see your folders and reports in a list on the left hand side of the screen with the Actions on the right hand side.

*List View*

If you select the *Details* option, you will see your folders and reports in the same way, but any description that has been added in the properties of the folder will show up.

*Details View*
**Personal Tab**
The Personal tab gives the user a summary of the authentication information, including the username and e-mail address associated with the account used to log in to Cognos.

The Personal Tab is used by the College of Charleston to update account information when the Cougars account password has been modified, as is required every 90 days. After modifying the Cougars password, you will need to log in to Cognos and **Renew the Credentials**.

1. Select the Personal Tab in My Preferences.
2. In the middle of the page, select the “Renew the credentials” hyperlink.

---

**Renewing your Credentials**

Once you click on the hyperlink to renew your credentials, if you are using Internet Explorer, you will get an Internet Explorer pop up box that will indicate your success in renewing your credentials. Click on OK to confirm. If your pop-up blocker is not turned off, you will simply return to the same screen as the above screenshot.

---

**Implementing Your Choices**

Once you have modified all of your desired options, click “OK” at the bottom of the Set preferences interface.
### Implementing the My Preferences Changes

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Specify your settings:</td>
</tr>
<tr>
<td>Number of entries in list view</td>
<td>100</td>
</tr>
<tr>
<td>Separators in list view</td>
<td></td>
</tr>
<tr>
<td>Alternating backgrounds</td>
<td></td>
</tr>
<tr>
<td>Style</td>
<td>Contemporary</td>
</tr>
<tr>
<td>Portal</td>
<td>Default view:</td>
</tr>
<tr>
<td></td>
<td>List</td>
</tr>
<tr>
<td></td>
<td>Details</td>
</tr>
<tr>
<td>Regional options</td>
<td>Product language:</td>
</tr>
<tr>
<td></td>
<td>Use the default language</td>
</tr>
<tr>
<td></td>
<td>Use the following language: English</td>
</tr>
<tr>
<td></td>
<td>Content language:</td>
</tr>
<tr>
<td></td>
<td>Use the default language</td>
</tr>
<tr>
<td></td>
<td>Use the following language: English (United States)</td>
</tr>
<tr>
<td>Time zone</td>
<td>Use the default time zone</td>
</tr>
<tr>
<td></td>
<td>Use the following time zone: (GMT-05:00) Eastern Time: Ottawa, New York, Toronto, Montreal, Jamaica, Porto Acre</td>
</tr>
<tr>
<td>Enable bidirectional support</td>
<td>Base text direction for content: Contextual</td>
</tr>
</tbody>
</table>

---

*Implementing the My Preferences Changes*
V. Running Reports

There are multiple ways to run a report. You can run a report using the defaults set up by the author. You can use the Run with Options feature to select a different format for the output, save the report, e-mail the report, or burst the report.

Running a report using the defaults

To run a report, navigate to the location and click on the title one time. The report will run and will, most likely, take you to a prompt page. Once you have answered the prompts and select Finish at the bottom of the screen, the results will be returned in the format the author selected.

The date/timestamp associated with each report does not indicate the last time a report was modified or the data was refreshed. It is a date/time associated with a change of any sort to that report. Remember, data is refreshed two times each day.
Prompt Page
Most student area reports will have a prompt page. This allows the report author to create a report that can be used for different purposes. A prompt page can allow for one report to be written and any major selected, any term selected, any fiscal year, etc. This keeps the report consumer from having to request new reports for each major, for each term, each fiscal year, and so on. It makes the reports more flexible and reporting at the College more efficient. For Finance and Human Resource reports, only data to which the user has been granted access in Banner will be returned in the prompts, just like in the actual report. For Student data, all users with access to Student data have access to all areas of Student data, not just his/her specific area.

Types of Prompts
There are different types of prompts used for different reasons.

Required or Optional
The prompt can be either required or optional. If the prompt is required, there will be an orange asterisk to the left of the prompt, as seen in each of the prompts in the screenshot below. Most will also say required out to the right of the prompt.

If a prompt is required, you cannot select “Finish” until a value has been selected for each required prompt on the prompt page.

Cascading
Additionally, some prompts are cascading prompts. A cascading prompt means that the value of the first prompt will dictate the values in the second prompt. On the “RO List of Majors” prompt page, seen above, the Term prompt will determine which values are available in the Major prompt. This means that
once a term is selected, it sends that value back to the database (you will see the hourglass spin) and returns only the majors that are active for that term.

If you run a report with a cascading prompt and no values show up in the next prompt, please try using Mozilla Firefox. This is a known bug with Internet Explorer. In the example above, the major would remain empty.

**Sort Order**
The last prompt on the “RO List of Majors “prompt page is to determine the sort order. The options are *Student Name, Advisor Name* and *Student Classification*. A few, but not many, reports give the user the ability to select how the results are returned to them.

**Data Entry**
Another option for types of prompts is the data entry prompt. The *Student ID* prompt on the below screenshot is an example of a data entry prompt. This allows the end user to enter data into the small box on the left and click on Insert to populate the prompt. In this example, more than one ID can be entered for search purposes. To have to search manually through a list of every ID for students would be too cumbersome, so Cognos makes this an available option.
Implementing Your Choices

Once all prompts are answered, the user must click “Finish”. If “Finish” cannot be seen, use the scroll bar on the right to scroll to the bottom of the page. If the user is already at the bottom of the page, but “Finish” is greyed out, the user has not answered all of the required prompts. Compare the two screenshots below for an example of this.

**Prompt page, Finish unavailable**

**Prompt page, Finish available**
Running reports using the Run with Options feature
An end user has the ability to modify the default parameters of a report. By clicking on the blue Play button under actions (5th icon from the right in the screenshot above), the user is taken to another window. There are additional Advanced Options available, as well, which allows the user to include e-mailing the report to additional people, save the report outside of the Cognos Connection and bursting reports.

Run with options, General Screen
From this screen, the author can modify the output format (from HTML to Excel, for example), decide how the user wants the report to be delivered (view the report or e-mail the report are two options), and whether or not to answer prompts.

Run with Options
If you run a report often and are frequently kicking it out to Excel or a PDF file, this is the appropriate place to help with your process. Often, if a user kicks a report out to Excel after having run it in HTML, the Excel file will have a tab for each page. If the user selects the Run with Options icon and selects Excel here, only one tab will be created in Excel.

The Delivery part of the Run with Options screen allows the user to view the report immediately, save the report, print the report or e-mail to himself/herself. There are two options to avoid from this list—Save and Print. The Save option creates a Reporting View of the report which is published for all consumers to see. When found, these will be deleted by the Cognos Administrators. Print the report allows the user to select a printer. This is not your desktop printer or network printer. This allows the users to select a system printer installed with Cognos. Currently there are no printers installed. To print a report to your normal printer, select view the report now and print as you normally would from the output format you selected. The e-mail option here allows for the end user to e-mail only himself using the e-mail associated with the account of the user who is logged in. It cannot be changed here.

The bottom option on the screen is a checkbox for Prompt for values. By default, it is checked. Always leave it checked. If it is not checked, please check the box. If this is not selected, the report will seem to run, but an error will occur and a Cognos Administrator will e-mail you notifying you that the report
failed because of unanswered prompts. There is no impact on having this checkbox selected if a report has no prompt to answer.

**Run with Options, Advanced Options default**

To have additional functionality, such as saving an output file outside of the Cognos Connection, e-mail someone other than the account of the person logged in, bursting reports and scheduling the report to run later, select the Advanced Options in the top right corner of the screen.

When you first click on Advanced options, you are taken to the screen as seen below. From this screen, you can modify the number of rows returned in HTML or opt to Run the report in the background and schedule for a later time.

![Run with Options, default view](image)

**Modifying the format**

To select a different format, simply click on the Format dropdown and select the desired output. If something other than Excel is selected, the option to modify the rows returned is removed. Other outputs return results per page as permitted by the format. Excel will return results on one tab. PDF output will return results on pages as allowed by the options the end user selects from the options that show up when PDF is selected – page orientation and paper size.

**Modifying the number of rows returned**

To modify the number of rows returned, simply click on the drop down and select the desired number from the list. The largest option is 1000. By default, the number of rows returned is 20.

**Implementing Your Choices**

Once you have modified all of your desired options, click “Run” at the bottom of the Set preferences interface.
Advanced Options, Run in the background

Cognos gives even more advanced options such as e-mailing additional people, saving to a location outside of Cognos and bursting a report. As you can see from the screenshot below, there are more options for delivery.

![Advanced Options, Run in background](image)

Delivery options

The options that appear now are Save the report as a report view, Save to the file system, Print the report and Send the report by e-mail.

When using Save the report as a report view has two options under Edit the Options – modifying the name and location of the Reporting View.

Using the Save to the file system option allows a user to save a report output to a network drive. All Cognos output reports are saved to a subfolder within the following location: \\
\aiken\ProdCognos. Permission has to be requested and setup for each user. If a new folder needs to be created, please use the form at this location: Request a new folder form. If you try to save a file to a location to which you do not have access, Cognos appears to allow for this, but it will fail. A Cognos Administrator will notify the user that the report failed and why.

The Print the Report option, like the one previously mentioned will not print to any printer. This feature is not currently in use. It refers to a system printer for the Cognos server and there is currently no printer set up for this purpose. Please run the report and print from the output, which will allow you to print to your normal local or shared printer.

When Send the Report by e-mail is selected, you will want to select the Edit the Options hyperlink. See the below screenshot to see that interface.
There are a few important things to note about the options offered with this screen. First, note that you can add any username or e-mail address in the “To” and “Cc” fields. Remember that the College of Charleston security rules are still in place, so please do not e-mail data to someone who does not have the appropriate security permissions. Please do not e-mail secured data.

The default subject field uses this syntax “Report: name of report”. This can be modified to be anything desired. If the report does not show up in your Inbox, please check your Junk Mail folder.

The body of the e-mail can include any text the user would like to include. If you would like the body of the e-mail to be the results of the report, please leave this blank and unselect Include a link to the report and Attach the report. If sending an Excel file or PDF, make sure that Attach the report is selected. These formats cannot be included in the body of the e-mail.

You have two additional options at the bottom of the screen: Include a link to the report and Attach the report. No matter what your choice of output format is, these are available to you.

Once you are satisfied with the options selected on this screen, click OK to return to the main Advanced Options screen.
**Bursting**

Bursting is a feature offered by Cognos which allows users to send various e-mails or output files based on results within the report. For example, Absence Memo uses bursting to notify professors when a student has missed a class. The Absence Memo office enters one or more student IDs and each professor for the term selected receives an e-mail notification of all of the students absent from any of his/her classes with information regarding the absence. Absence Memo does not have to decide to which professor to send the e-mails, the system does it for them.

The e-mail address has to be included in the report and can be pulled from the system or added manually to the report. The report has to be set up for bursting, as well. If you select Advanced Options for a report set up for bursting, then a bursting option will appear. You can burst to files or via e-mail. Permission has to be granted specifically to allow for bursting to be used by a Consumer.

If bursting is not available for a report, it is not a visible option in the Run with advanced options screen.

**Prompt for values**

Again, it is very important to leave the checkbox to prompt for values selected. If this is not selected and the report contains prompts, it will fail. A Cognos Admin will send you a notification that your report failed due to prompts not being answered.

**Implementing Your Choices**

Once you have modified all of your desired options, click “Run” at the bottom of the Set preferences interface.
Creating a Shortcut

Cognos allows users to create shortcut to folders or reports on their My Folders portal tab. Creating a shortcut to a folder or report allows for the end user to be able to organize the reports used most often in the most efficient manner for themselves. If the end user copies a report and pastes it on the My Folders tab and the author updates the original report in the Public Folders, the report on the My Folders tab will be out of date. By creating a shortcut to the report rather than copy and pasting, the end user is sure to have the most up-to-date version of the report. Best practice is to create a shortcut to the folder which contains the desired report(s). This will ensure the end user will see not only the most recent version of the target report, but will also see any new reports the author may add to the folder.

To add a shortcut, navigate to the location of the folder to which you want to create the shortcut, then click on “More” under actions and select Create a Shortcut to this entry. A new window will display (see screenshot below) and you will have the opportunity to name the shortcut as desired. By default, Cognos names all shortcuts “shortcut to...” name of the folder.

Once the shortcut is named, the Description of the folder can be modified, as well. A Screen tip can be added, too. A Screen tip is the little box that pops up when the user moves the mouse over the folder. It is often a one to two word hint indicating the purpose of the folder.

The final step in creating a shortcut is to select a location. By default, a Consumer cannot save a folder in the Public Folders. You must select the “Select My Folders” option. If you have existing folders on the My Folders tab, you will need to navigate to the location on you’re my Folders tab that meets your desired location for the shortcut. Then click on Finish.

When you use the shortcut, you will notice the breadcrumbs tell you where you are (My Folders to start). Once you click into the folder to which you have created a shortcut, you will notice the breadcrumbs indicate you are now in the Public Folders location of the target folder.
Creating a Reporting View

A Reporting View (RV) is a tool that Cognos offers to its users and should be used for all scheduling of reports. A Report View shares the same reports specification as the source report—it’s essentially a copy of the initial report. It is a reference to another report that has its own properties, such as prompt values and schedules. It gives the end user the ability to set the answer to prompts statically. Creating multiple copies of an RV will allow the end user to create as many iterations of the report as desired. We will use the RO_Course_Catalog_by_Subject report in this example.

Find Your Report

Log in to Cognos (reporting.battery.cofc.edu) and find the report of which you want to create a Reporting View. In this case, I will go to the Public Folders/Student/Academic Administration Reporting folder.

Find the report desired in the list of reports.

Initiating a Report View

1. Follow across the screen to the icons listed under Actions (in List View) and find the one that looks like a window pane with a plus sign in the top right corner.
2. Click one time on that icon. A new page will open up.

Specify a name and description – New Report View Wizard

3. You will have a minimum of one and up to four options for this screen.

   a. Name: Select a name for the RV. I recommend naming the RV to include the name of the report (default name includes this) and the values for the prompts you will assign per iteration. The value you select for the prompt will serve as a filter for the report. So if you select Academic Period Fall 2014, the results will include only students or courses relevant to the Fall 2014 Academic Period.
b. **Description:/Screen tip:** You have an option to add a description of the report and a screen tip (the little box that pops up when you mouse over something).

c. **Location:** Select a location. Click on *Select My Folders*. By default, the location will say *None*. If you have folders created on your My Folders tab, you can select Choose another location, then select My Folders and the radio button next to the folder in which you want to store the RV.

d. Click **Finish**. Cognos will take you back to the location of the report from which you are creating the RV.
Accessing and Setting Properties for Your Report View

4. Click on My Folders and navigate to the location you stored your RV. Now you have a Report View created, and it is time to set the values of the prompts.

5. **Set Properties**: Click on the first icon, Set Properties.

6. **Report View tab**: There are two tabs available to you. Click on the second tab, *Report View*. You may have a third tab for Permissions, as seen below. Some users will have access to this tab while most will not.

7. There are several steps involved in creating this part of the RV.
   a. **Default action**: Change the *Default action* to “Run the report”.
   b. **Report options**: Check the “Override the default values” under *Report Options*. Additional fields will become available to you.
      i. **Format**: Select the format in which you would like the report to run.
      ii. **Language**: No need to make a modification here.
      iii. **PDF options**: If you have selected PDF as your format, you can modify the orientation or create a password for the file using the Set link.
   c. **Prompt Values**: Under *Prompt values*, select “Set”; by default, “No values saved”. This will take you to the prompt page. (It may take several minutes for the prompt page to load.)
      i. Once the prompt page is available, select the responses to each prompt, as desired.
      ii. Click “Finish”. If “Finish” is grayed out and you cannot select it, you have not selected a value for all required prompts. Required prompts have an orange asterisk next to them. This will take you back to the *Set Properties* page.
d. **Advanced Options:** No need to take any action here; however, if you selected HTML as the report view, you can click on *Advanced options* and choose a larger number of rows to return per page. I recommend 100; by default it is set to 20.

e. Click OK.
**Report View now in your My Folders location**

To create multiple iterations of the same RV (instances that have a slight variance among available prompts), return to the Public Folders location of the original report and follow the same steps as above but enter a different name for the report. This will give you the ability to answer the prompt(s) differently for each version and not have to answer them in the future. If you opted to use the answer to the prompts within the name, then follow that same process as many times as needed to get each variation you want.

![Screenshot of two Report Views created and named with the prompt value for differentiation.](image)

To run it on demand, simply single click with the left mouse button on the name of the Report View. It will take you to the prompt page, but the prompts will already be selected and you can simply select “Finish”.
VII. Options from returned results interfaces

Within the report results, there can be multiple options the end user has. Some reports have drill through functionality, some continue on multiple pages.

The HTML Interface

When viewing the report output in HTML, there are several features of interest. Cognos is best viewed in Internet Explorer or Mozilla Firefox. It has limited functionality with Google Chrome and Safari as of version 10.1.

The Toolbar icons

The toolbar at the top of the frame and the frame bar both contain tools the end user can use.

The top bar (green bar in the screenshot above) is standard no matter which report is run. The top left of the HTML report results interface contains the name of the report. In the top right of the top bar contains the username, the ability to log off, go home, return to the list of reports from which this report was selected, or learn more about Cognos.

Underneath that is the actual report that was created by an author at the College. In the example above, a departmental logo indicating the data owner is included. Next is the title, “List of Majors by Term”, in this example. Under the title are the results of the prompts selected.

In the top right of the report frame are a variety of options. The first is the ability to “Keep this version”. It is a dropdown that allows the user to e-mail the results, save the report or save the report version. See the Advanced Options, delivery options for a description of these features.

The next icon is the blue play button. Here, this icon allows the user to return to the prompt page. The previously selected items will be highlighted and the user can change any of the previously selected parameters. This would be a good tool to use if the user wants to select a different major but same term or a different term but same major, for example.

To the right of that are the icons for drill through items. Most of the reports we have created with drill through have the drill through detail pop up in a new window. In those instances, these icons are not necessary.

Next is the icon for related links. Currently, no reports have links embedded in them.
The next icon is very helpful. This is the one that allows users to kick a report out to a different format from the one originally selected. If the report is run in HTML, the default icon looks like a piece of white paper with the letters HTML on it - 📝. From the dropdown menu, the user can kick out a report to any of the other format options available. If you are kicking a report out to Excel and are using Internet Explorer, you will need to make sure you have modified your security settings. This includes turning off your pop-up blocker. You can follow these instructions by clicking here or going to the BI website and clicking on the “Additional Documentation” link from the menu.

To print the report from your browser, please select the printer option from your browser menu as you normally would for any item needing to be printed using an internet browser. Make sure you do a print preview to ensure the layout of the report will print to your satisfaction.
The Body of the Report

Underneath the header pictured in the HTML report results, toolbar, are the returned results of the report. This is considered the body of the report.

Within the body of the report, the user can click on a hyperlink (any value shows a hyperlink – blue text that is underlined) to get to a lower level of detail. The list of Colleges in the below example are hyperlinks. When the user clicks on a hyperlink, a new window pops up with the details.

![HTML report results, hyperlink main]

If “LC” is selected from the Colleges column, a new window with the Departments from that College is shown.

![HTML report results, hyperlink detail]

Again, the user can select one of the Departments to dig deeper. When the user has seen the desired results, he/she can close the drill through window to return to the original report results and select another College or return from there to the list of reports.
The Footer of the Report
This is the part of the report that is the same on every page. Report Authors have the ability to modify the footer to include or exclude anything he/she wants. Generally, the date and time the report ran are included, along with the page number and some include the path to the report within Cognos.

HTML report results, footer

Underneath the part of the footer that is controlled by the report author are options to scroll to additional pages. This is only available if there is more than one page to the results. You can see the screenshot above that “Top”, “Page up”, “Page Down” and “Bottom” are listed. “Page Down” and “Bottom” are underlined. The underline shows the user that he/she can select that option. “Top” and “Page up” are not underlined because the screenshot was taken from Page 1 of a multi-page report.

If the user selects “Bottom” in HTML, the page number will switch from a numeric value to a “?”. HTML is not able to determine how many pages there are because it adjusts the pages differently. If the user selects “Page down” and continues through this process, the page number will increase correctly.
The PDF Interface
If you select to output the report results into PDF, the PDF will open within your browser window and has the same options.

The Toolbar icons
Please refer to The HTML Interface section of this “How To” guide for details on toolbar icon functionality.

If the report is run in PDF, the default icon looks like a piece of newspaper red letters for PDF. From the dropdown menu, the user can kick out a report to any of the other format options available. If you are kicking a report out to Excel and are using Internet Explorer, you will need to make sure you have modified your security settings. This includes turning off your pop-up blocker. You can follow these instructions by clicking here or going to the BI website and clicking on the “Additional Documentation” link from the menu.

You will also have the typical PDF features of print, save, page down, zoom, etc. that are always offered with PDF files are also available to you to use. This is where you will want to print your document. Make sure you do a print preview to ensure the layout of the report will print to your satisfaction. If you have output a file from HTML to PDF, it is possible that there will be hanging columns (1 column on page 2, 4, 6, etc) that would have shown on one page if printed from the HTML interface.
The Body of the Report
The body of the report in PDF format looks very similar to the HTML output of a report and will look familiar to anyone who has opened a PDF file before.

Drill through features no longer work. Even though the fields appear to be hyperlinks, it is only the formatting that was copied into the PDF file. The links are not active hyperlinks.

The Footer of the Report
This is the part of the report that is the same on every page. Report Authors have the ability to modify the footer to include or exclude anything he/she wants. Generally, the date and time the report ran are included, along with the page number and the path to the location of the report.

Nov 10, 2014
1
3:05:49 PM

PDF report results, footer

Unlike HTML reports, PDF is able to determine the number of pages if the user decides to go to the last page of the report. To navigate within a PDF report, the user will need to use the PDF options in the header. There is no “Page up”, “Top”, “Page down” or “Bottom” option in PDF since that functionality is provided by the tool itself. See the screenshot for the PDF report results, header above for what this will look like.
The XML Interface

XML is a computer language used by many software products. Wikipedia defines it as follows:

**Extensible Markup Language (XML)** is a markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable. It is defined in the XML 1.0 Specification produced by the W3C, and several other related specifications, all gratis open standards.

The main reason a user may want to output a report into this language is to upload the results into a different application.

A portion of the “RO List of Majors” report in XML looks like this:

```
<xmlreport>
  <reportname>RO List of Majors</reportname>
  <outputformat>xml</outputformat>
  <reportcontent><![CDATA[<dataset id="dataSet1" xmlns="http://www.example.com/ROListOfMajors">
<metadata>
  <item name="College" type="string" length="30"/>
  <item name="GradRate" type="float" length="4"/>
  <item name="% Grad Rate Type" type="string" length="10"/>
  <item name="% Grad Rateelong" type="float" length="8"/>
</metadata>
</dataset>]]></reportcontent>
</xmlreport>
```

**XML report results**
**The Excel Interface**

Users have the ability to kick out a report to Excel. The options for kicking a report to Excel are Excel 2007 Data, Excel 2007 Format, Excel 2002, Excel 2002 Format, and CSV format. A user can select any of the options from the list. If Excel 2010 is installed on the computer from which the user is accessing Cognos, select 2007. No functionality or data will be lost.

The name of the report is the same as the name of the Cognos report plus a short alpha-numeric string.

Please note that when using CSV output, the separator is a comma. This is the same for all users and cannot be changed.

There are no toolbar icons. Once a report is kicked out to Excel, the user is active in an Excel interface and it appears as any other Excel report does. You will need to Enable Editing if using Excel 2010 or newer. The user has the ability to print, save, modify, etc., anything within the Excel file just as he/she does with any Excel file.

**The Body of the Report**

Like the toolbar section, the body of the report looks and behaves just like any Excel workbook. The columns from the HTML report populate into individual columns in Excel, merged cells appear for the header and footer.

Each hard coded “page” of an HTML report will produce a separate tab. Hard coded pages are determined by the report authors. The “Fiscal Year to Date Activity” report, for example, has hard coded page breaks between each Organization within each Fund. A report like the “RO List of Majors” will populate one tab. It appears as many pages within HTML because the Cognos default setting is to break each page at 20 lines.

Drill-through features are not available within Excel. Even though the fields appear to be hyperlinks, it is only the formatting that was copied down into the Excel file. The links are not active hyperlinks.

Also note that the total fields or summary fields are not calculations, but merely numbers. This means that if you delete a row of data, the summary data does not change.

**The Footer of the Report**

The HTML footer containing the date, page number, etc., appears within the page of the Excel report. A new Excel footer can be created by the user on the Insert tab by clicking on the Header & Footer icon.
VIII. Logging Out

It is very important the user logs out of Cognos when he/she completes the desired tasks. This ensures that no other user will be able to access the data to which he/she has not been granted access.
IX. Contacts and Help

Cognos users at the College of Charleston have several places to turn for help. Please follow the guidelines below to ensure the most efficient response.

**Administration and Training**

Information Management is responsible for the administration and training of Cognos. Please contact CognosHelp@cofc.edu to request training or for general help/questions about Cognos.

For a list of training times, please see the Business Intelligence portion of the IT website. Click here to be directed to that site. This site is available to the Public.

For access to the latest version of this document or the Cognos 10.2 Quickguide, please refer to the IT/Information Management/Additional Documentation website or the Information Management/Cognos Consumer SharePoint site. This site is only available to Cognos Authors and Consumers who have been to training. Users may be asked to log in. The Active Directory (Cougars) account should be used to access this secure site and you may need to include “cougars\” prior to your username.
**Errors**

If having problems with the functionality of Cognos or if an error is received, please contact [CognosHelp@cofc.edu](mailto:CognosHelp@cofc.edu).

**Common Errors**

<table>
<thead>
<tr>
<th>Error Message</th>
<th>What to do</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can’t find a folder to which I should have access.</td>
<td>There are 2 possible problems and solutions. Security is set such that you do not have appropriate permissions to access the folder. Send a license request for that type of data if you do not see the main subject folder (Finance, Student, etc.). If you see the main folder but don’t see a subfolder (I see Student but not my dept. folder within Student), contact <a href="mailto:CognosHelp@cofc.edu">CognosHelp@cofc.edu</a>.</td>
</tr>
<tr>
<td>When running a report, a SQL –9 error is returned</td>
<td>Contact <a href="mailto:CognosHelp@cofc.edu">CognosHelp@cofc.edu</a></td>
</tr>
<tr>
<td>When running a report, I don’t have any data in the prompts.</td>
<td>Contact <a href="mailto:CognosHelp@cofc.edu">CognosHelp@cofc.edu</a></td>
</tr>
<tr>
<td>When trying to kick a report out to Excel, the screen just blips.</td>
<td>Make sure the pop-up blocker is turned off. Go to <a href="#">IT/Information Management/Additional Documentation</a> and follow the steps required to modify the security settings for your particular browser. If you continue to have problems, please contact <a href="mailto:CognosHelp@cofc.edu">CognosHelp@cofc.edu</a>.</td>
</tr>
<tr>
<td>I get an Access Denied error</td>
<td>Could be a number of things, but you must be on campus to access Cognos or the SharePoint site; Contact <a href="mailto:CognosHelp@cofc.edu">CognosHelp@cofc.edu</a></td>
</tr>
<tr>
<td>When logging in, I get a failed Cognos session error</td>
<td>Try closing all browser windows and opening a new window. If that does not work, contact <a href="mailto:CognosHelp@cofc.edu">CognosHelp@cofc.edu</a></td>
</tr>
<tr>
<td>When running any report, I am prompted for a username/password</td>
<td>Contact <a href="mailto:CognosHelp@cofc.edu">CognosHelp@cofc.edu</a></td>
</tr>
<tr>
<td>Other problems</td>
<td>Contact <a href="mailto:CognosHelp@cofc.edu">CognosHelp@cofc.edu</a></td>
</tr>
</tbody>
</table>
Data Appears Inaccurate

If the results returned in a report do not appear to be accurate, please contact the person who wrote the report or the data owner for help. If you are unsure of whom to ask, please use the following list of people who are the primary report authors for the various areas.

Student/Course: CognosHelp
Faculty: Provost Office
Financial Aid: Jeffrey Nadeau (Nadeau)
Admissions: Aron Kuch (KuchA)
Accounts Receivable: Joe Meyers, (MeyersJR)
Finance/Budget/Procurement/Payroll: Pat Fillippa, Controller’s Office (FillippaPM); Matt Nichols (NicholsMD1); Cynthia Washington, Procurement (WashingtonC); Everett McInnis, Payroll (McInnisE)
Human Resources: Dee Cole, Human Resources (ColeD)
Submit a Request
There are a variety of forms available to College employees regarding Cognos usage. All forms are located in MyCharleston on the My Forms tab. Click on a title in the menu seen below and you will be directed to the requested form.

Menu from MyForms in MyCharleston

Report Request
To request a report be written, a College employee must fill out a form located in MyCharleston on the MyForms tab under Banner Report Requests. The user should consider the data desired not the position of the person at the College when selecting the type of data. For example, a Faculty member who wants a list of Majors should request Student data not Faculty data. Faculty data consists of rank, tenure, etc.; it is specific to the faculty member and does not include course or student data.

Once the data type is selected, the user will be directed to fill out the form. There are required fields for Name, Department and Email address and places to fill out data specific to the report.

The form will be routed to the appropriate report author who will contact the requestor. Creating and publishing the report for consumer use may take up to 2 weeks or longer, depending on the difficulty of the report and time of year the request is made.
Cognos Access Request
The College of Charleston offers a web form in MyCharleston on the MyForms tab under Cognos Access Requests for you to request access to Cognos. If you want to be an author or consumer, you must request access using this form. Please fill out the form as completely as possible, and it will be routed to the appropriate data owner for security reasons. Once your access is approved, IT Business Intelligence will invite you to training. Upon receiving training, you will be able to log in and write or run reports as needed.

To request access to reports for any of these areas, please log into my.cofc.edu and click on the My Forms tab. Please select the appropriate area for your business need. For example, if you would like to see a list of students enrolled in a particular course, select “Student”. If you would like to see your budget data, select “Finance”. “Employee” data is data regarding employees in your area.