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| **COGNOS Level I Training** |
| Running Existing Reports - Financials |
|  |
| University of Delaware |
|  |
| Last Updated |
| 3/9/2010 |
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**COGNOS Level I Training**

**Running Existing Reports (UD Financials Data)**

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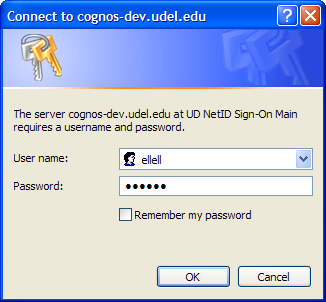
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**Logging in**

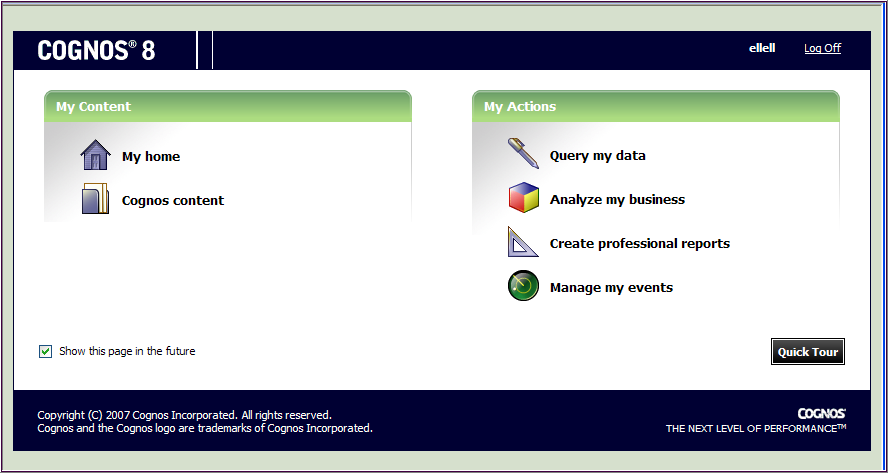
* NOTE - Use Internet Explorer (IE) to get the full capabilities of Cognos.
* This training module will use the Cognos development database <https://cognos-dev.udel.edu/cognos8>
* Enter your **UDelNet ID** and **password** in the dialog box.

****

**Cognos Welcome page**

**My content**

* **My home** –customize Cognos to take you to a specific folder
* **Cognos content** – ***Cognos Connection***; goes to existing reports/folders

****

**Cognos Connection**

Click here to run reports

**Report Studio**

Click here to create reports

**My Actions**

* **Query my data** – ***Query Studio*** (reporting tool not widely used at UD)
* **Analyze my business** – ***Analysis Studio***, not used at UD
* **Create professional reports** – ***Report Studio***, this is the main report writing tool
* **Manage my events** – ***Event Studio*** , not currently used at UD

**Tour of Cognos Connection**

**Home** – use this to set any current page as your “home page”

**My Area** – use this to view your report history and schedules, or change your personal settings

**Tool bar** - hover your mouse over icons to see their functions

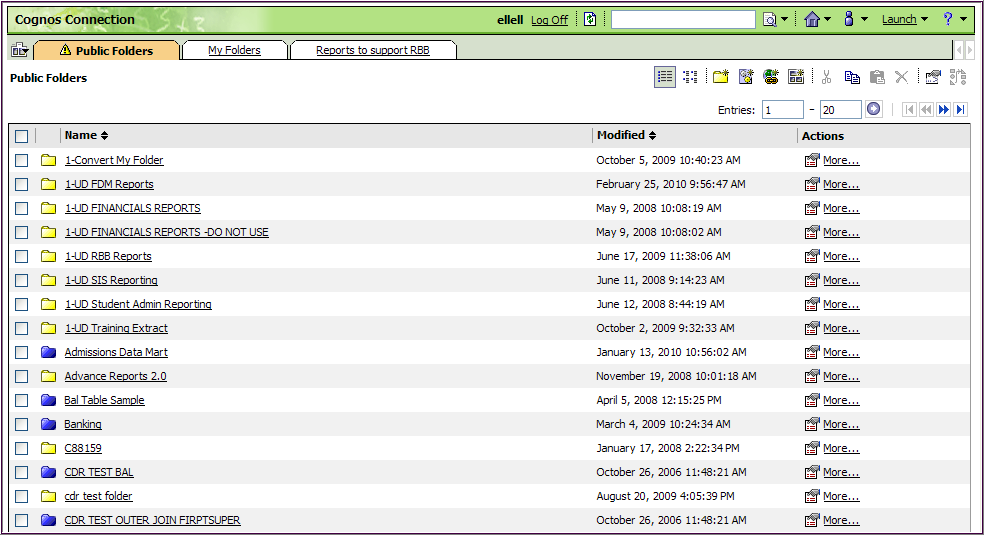
**Cognos Connection** is where the reporting **content** is stored.

**Launch** – use this to go **to *Report Studio***(if you have access)

Content includes data packages (tables) and existing reports.

**Search** – type keyword(s) to find a report, folder or package

*To create reports, go to Report Studio from the Launch link (access required).*



**Navigation buttons**

**Actions** – assorted action buttons that change depending on the type of content

**Checkboxes** – use these boxes to copy, paste, delete, etc using the tool bar icons

**Blue folder icons** – package folders that hold data tables by content area

**Yellow folder icons** – content folders that hold other content folders, reports or even packages.

**Public Folders** – content available to all campus users (based on your data access)

**My Folders** – content available only to the person logged-on

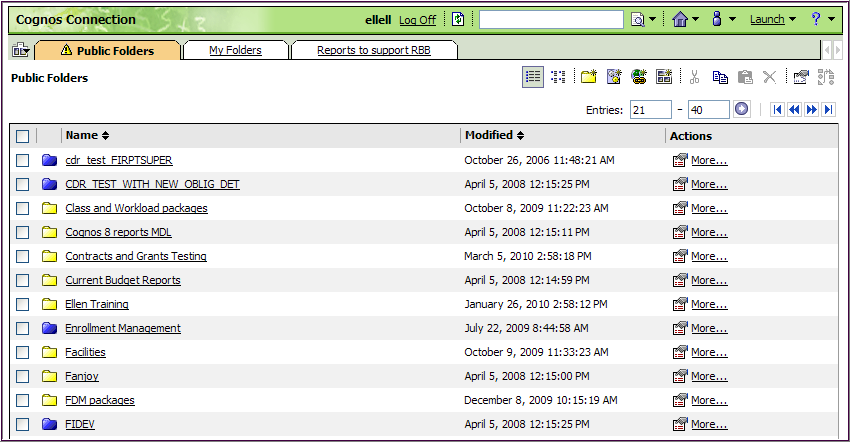
**Help**

Use the **up/down arrows** to sort content by Name or Modified date

**Running a report in your browser**

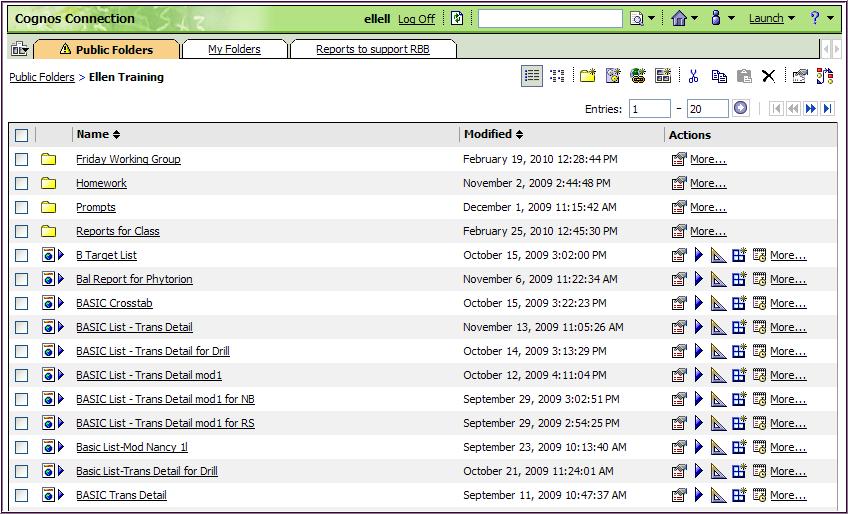
Navigate to the report you want to run, by clicking on the folder links. The results will display in your browser in HTML format.

In this example, we’ll look at the report named BASIC List – Trans Detail

****

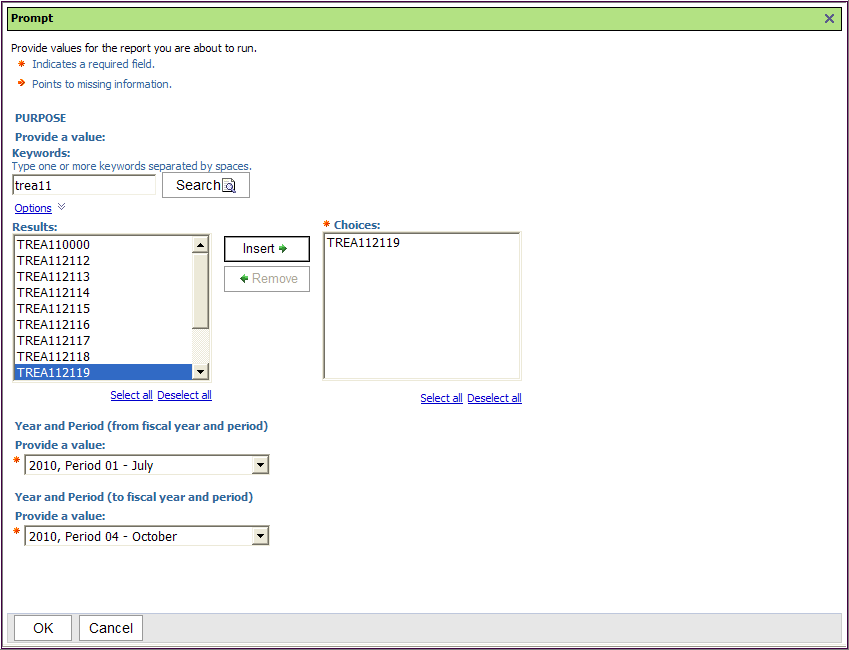
1. Click this navigation button

2. Click the link for the yellow folder called **Ellen Training**



3. Click the link for **BASIC List – Trans Detail**

This report has a **Prompt** for the **Purpose(s), Fiscal Year/Period from** and **Fiscal Year/Period to**



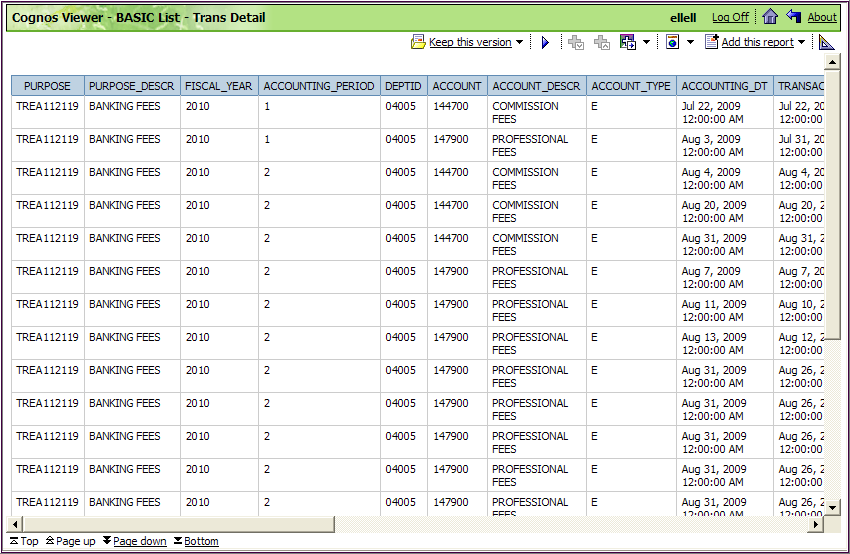
7. Click the **OK** button

6. Use the dropdowns to select the **from FY/Period** and **to FY/Period**

5**.** Click one or more **Purpose** codes in the **Results** box and click **Insert** to populate the **Choices** box

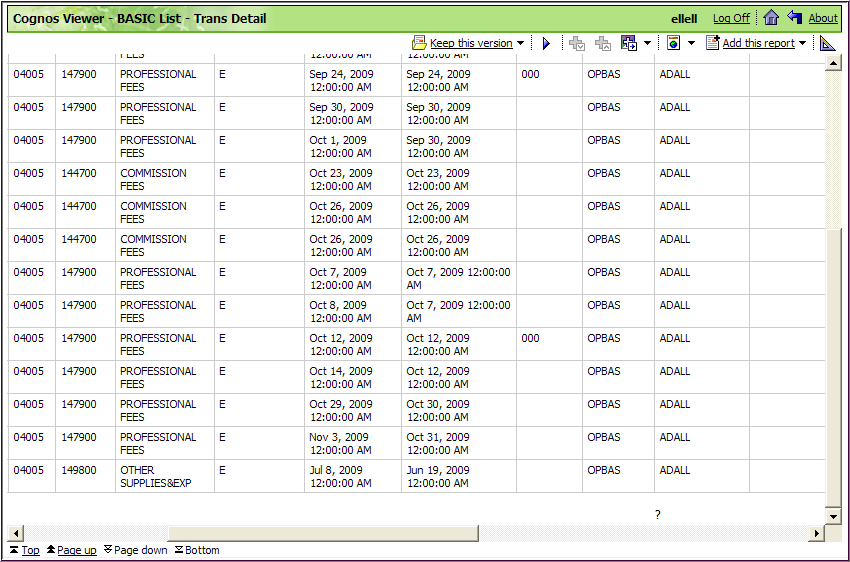
4. **Keywords** - enter a **Purpose** code (or partial)and then click **Search**

This opens **Cognos Viewer** which shows a partial view of the report.



7. Use the scroll bar and these links, such as **Bottom**, to view the rest of the data in the report

This is the last page of the report:



8**.** Click the **Return ** button to go back to Cognos Connection

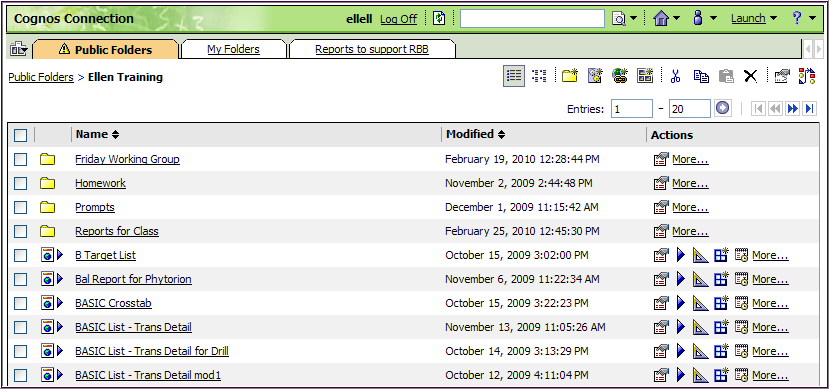
**Page number is ?...why?**

When a report is rendered in HTML, it cannot count the pages unless the Page down button is used.

**Run with options**

Use this method to give yourself more choices for your report’s format and delivery options.

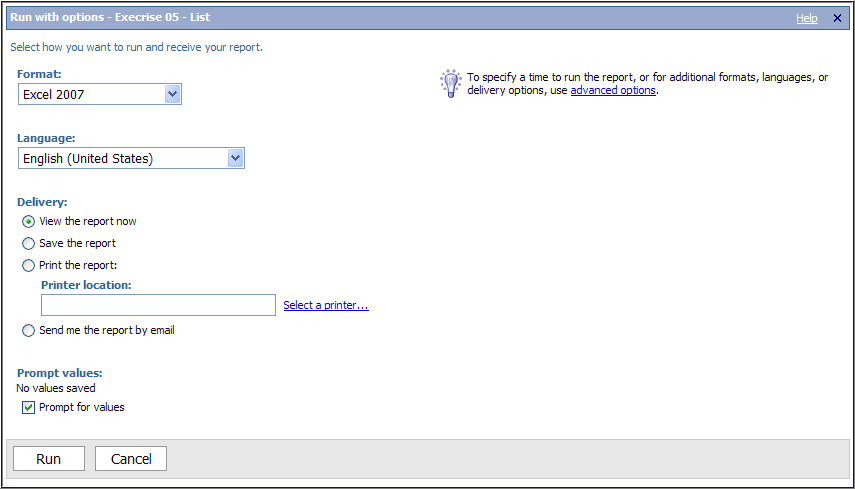
1. Find the report you want to download.



2. Click this button 

SNAGHTML55da07

1. In the **Actions** column, click (Run with options) – do not click the link
   * As an example, let’s download **Exercise 05 - List**

****

1. The options you will most likely use are:
   1. **Format** - HTML, various Excel versions, or PDF
   2. **Delivery** – **View report now** or **Send me the report by email**
   3. **Advanced** **options** – scheduling a report (once) or emailing to others

**Run with options - Downloading to Excel**

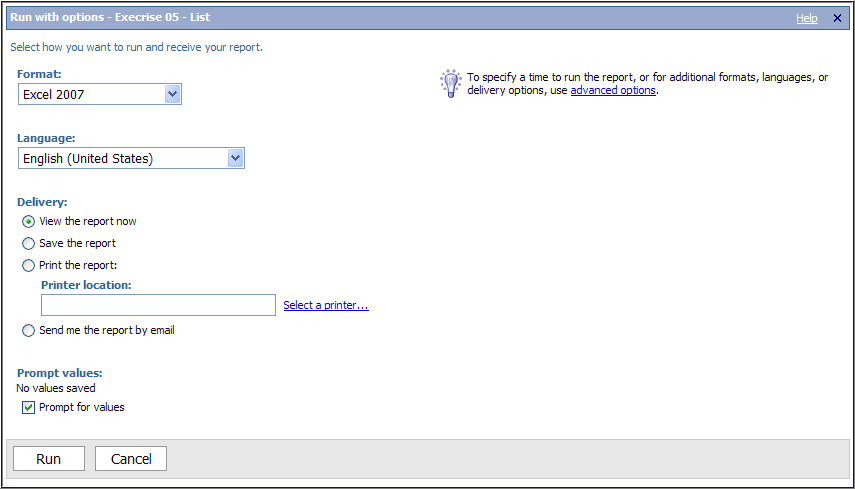
You must make sure your PC has these settings before attempting to download to Excel from Cognos Connection when using ***Internet Explorer***:

**Make these three setting changes in Internet Explorer (7.0 or higher):**

1. Tools/Internet Options/Security tab
   * Click **Trusted Sites**/**Sites** button,
   * Type **https://cognos-dev.udel.edu** in the top box and click **Add**
   * Click checkbox labeled **Require server verification…**
   * Click **Close** button
2. Tools/Internet Options/Security tab
   * In the section called **Security level for this zone**, click **Custom level**… button
   * Scroll to **Downloads**
   * **Automatic prompting for file downloads** – click **Enable**
   * **File download** – click **Enable**
   * **Are you sure you want to change the setting for this zone?** Click **Yes**
   * Click **OK** button
3. Tools/Pop-up Blocker/Pop-up Blocker Settings
   * Type **cognos-dev.udel.edu** in the top box and click **Add**

* Click checkbox - **Play a sound when pop-up is blocked**
* Click checkbox - **Show Information Bar when pop-up is blocked**
  + Click **Close** button

1. In the **Actions** column, click  **Run with options** (do not click the link)

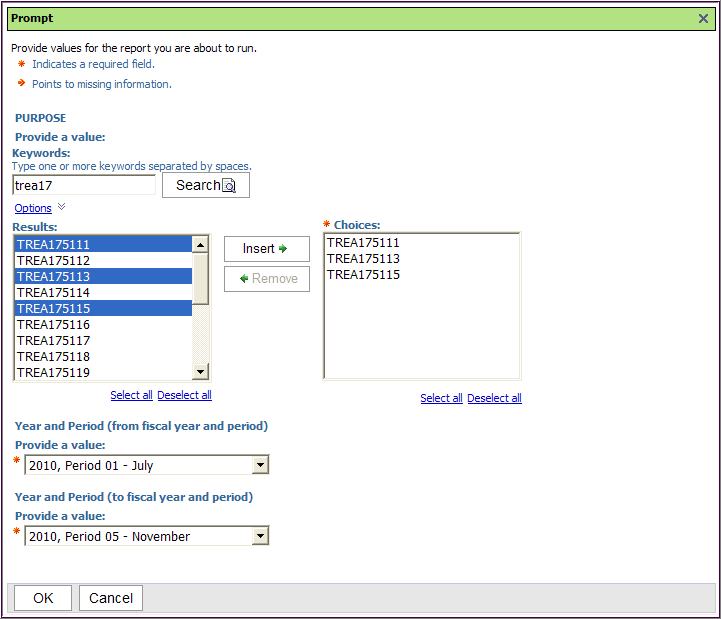


4. Leave this checkbox checked **ON**

2. Choose **Excel 2007** or **Excel** **2002**

3. Leave the **Delivery** mode as **View the report now**

5. Click **Run**

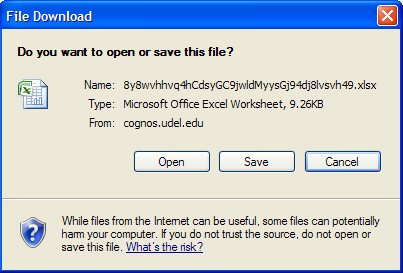


**Ctrl-click**

to choose multiple, non-adjacent values.

7. Click **OK**

6. Complete the prompts fields



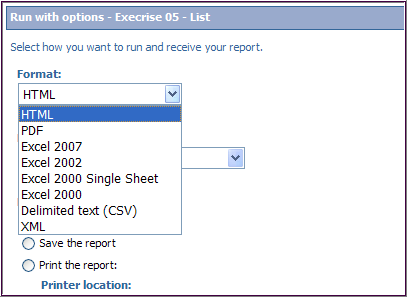
* Select **Open** or **Save** (your choice)

• Once Excel opens, you have full Excel functionality

• Save the file with a new meaningful name

**FYI - Run with options – Other Formats**

• **HTML** – results display in your browser.

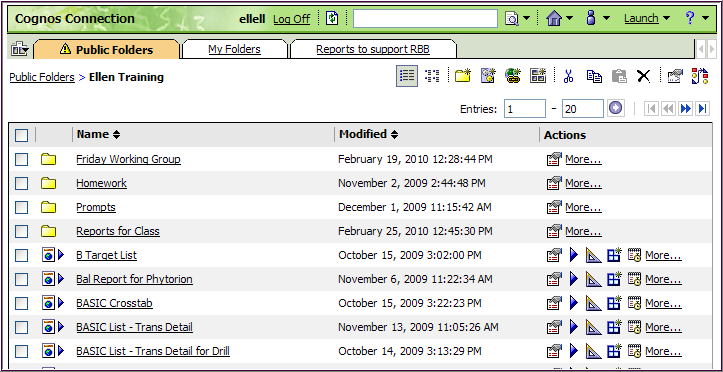


• **PDF** – creates a report that cannot be modified. (Acrobat Reader must be installed on your system)

• **Delimited text** **(CSV)** – creates comma separated values for using with Excel

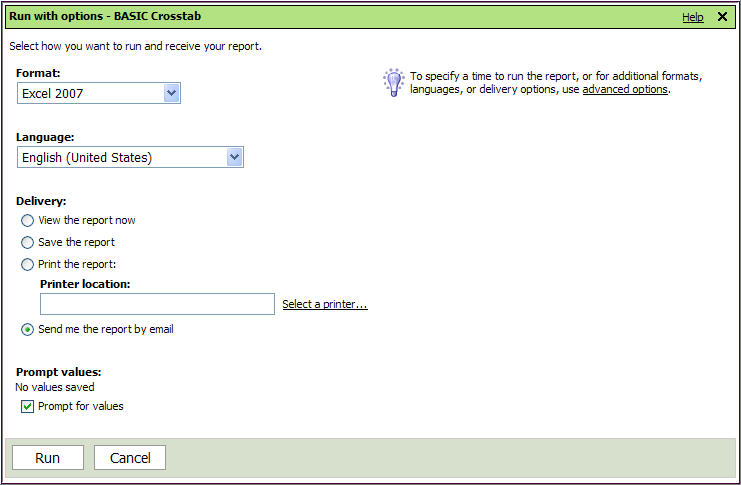
• **XML** (extensible markup language) – allows you to see XML representation of the report’s queries, prompts, layouts and styles.

**Run with options - Emailing a report (BASIC Crosstab) to yourself**



1. Click this button 

1. In the **Actions** column, click **Run with options**  (do not click the link)



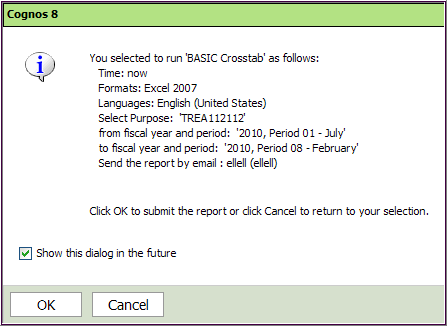
3. Click this radio button

4. Leave this checkbox checked **ON**

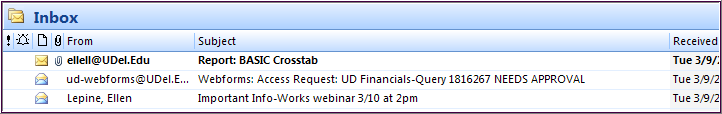
2. Choose **Excel 2007** or **Excel** **2002**

1. Click the **Run** button
2. When the Prompt page appears, select an appropriate values

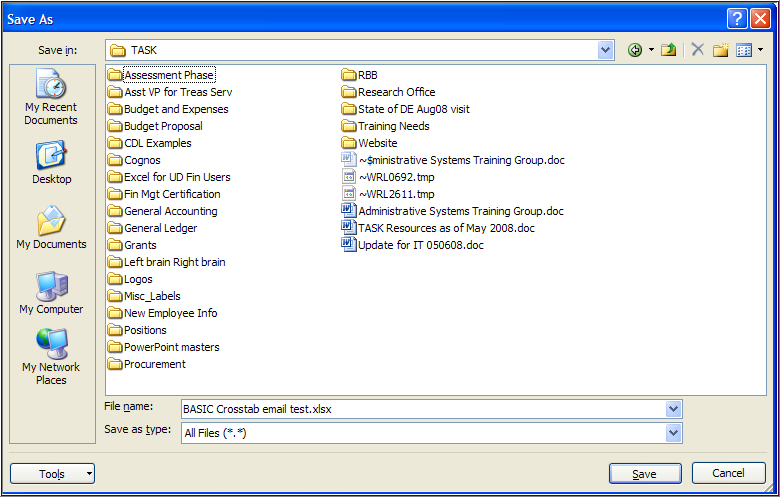
Note – If you want to send the report to additional emails beyond your own, go to pages 14 - 16 and follow instructions for advanced options.



1. This screen gives you a chance to verify your selection criteria
2. Click the **OK** button to submit the report (or click **Cancel** to start over)



1. Moments later an email will arrive in your Inbox with the report attached as an Excel file with ***your email address*** as the sender.

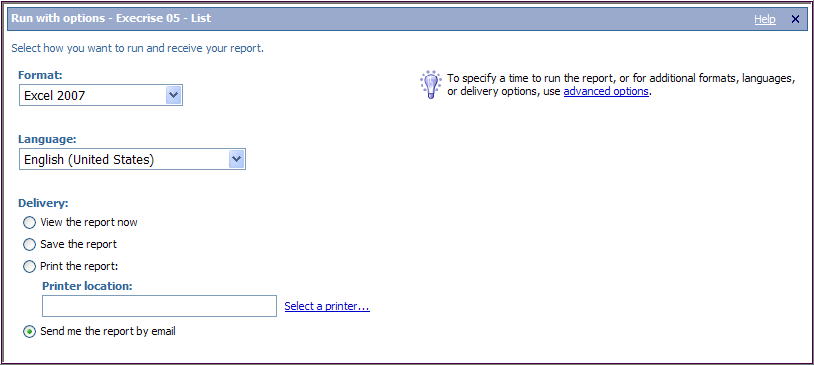


1. Open the file from your email, save immediately
2. **File Name –** change file name as needed, choose location and click **Save**

Note - If you select **Excel 2002** **or earlier version** you may get a **WARNING!!!** message in your email that says in part “The following message attachments were flagged by the antivirus scanner”. Our IT-NSS staff say you may ignore this message and proceed with viewing or saving the Excel attachment.

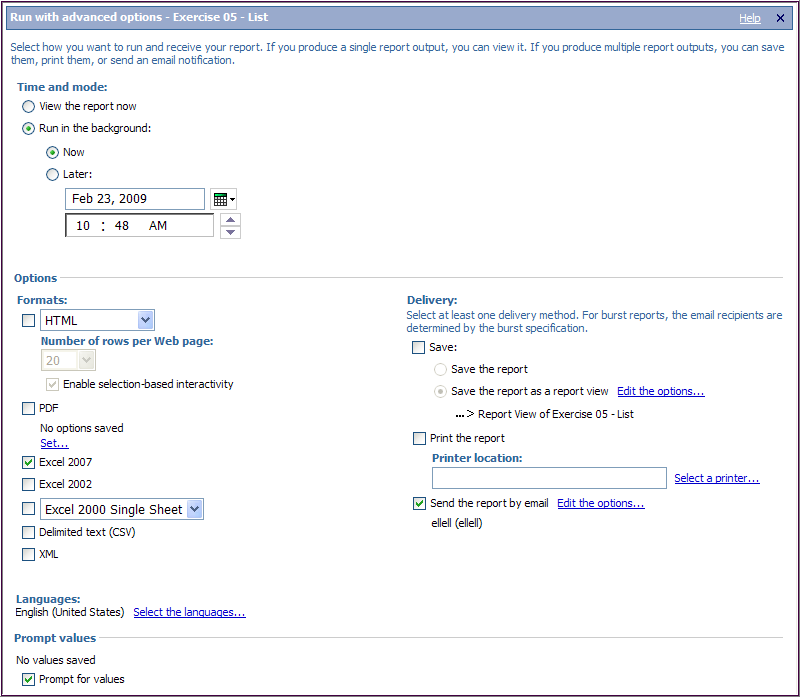
**Advanced Options - Emailing a report to others**

1. If needed, find your report and click **Run with options**  



3. Click the **advanced options** link

2. Click this radio button



X

6. IMPORTANT - Click the 1st **Edit the options…** link to save a report view of the report in **My Folders**

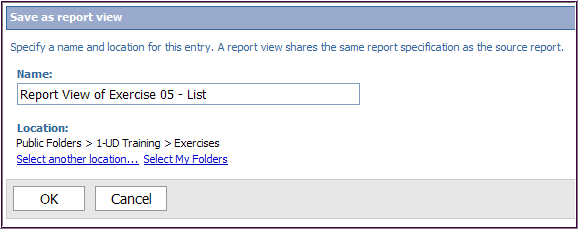
5. Choose **Format** (Excel 2007, PDF, etc.)

4. Click radio buttons:

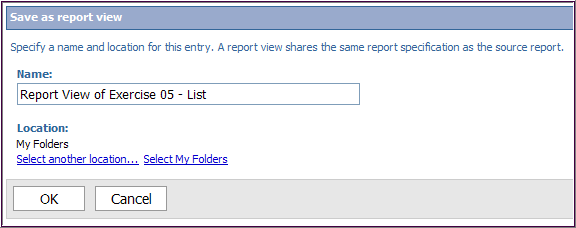
**• Run in the background**

• **Now**

Note: You can schedule the report to be emailed later by clicking **Later** and setting the date/time (see pg 17).

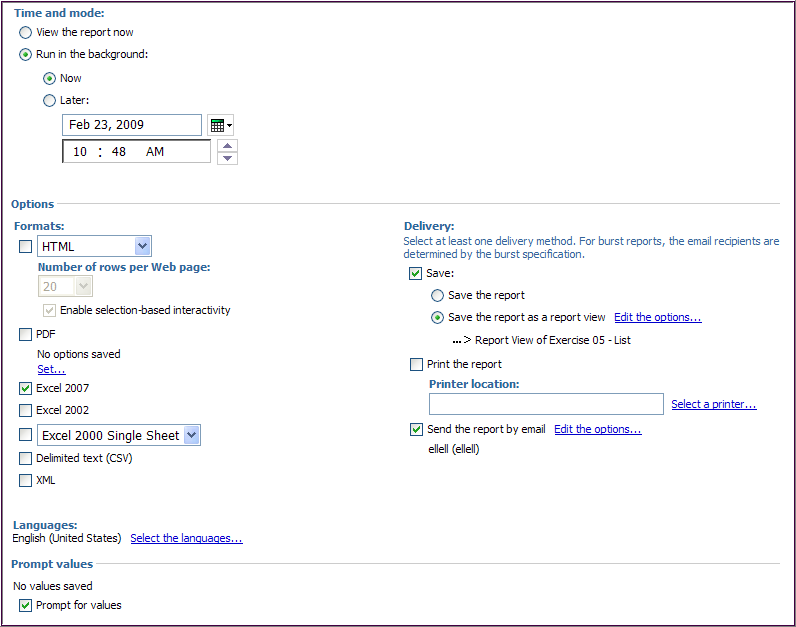


7. Click **Select My Folders**



8. Notice the **Location** changes to **My Folders**

9. Click **OK**

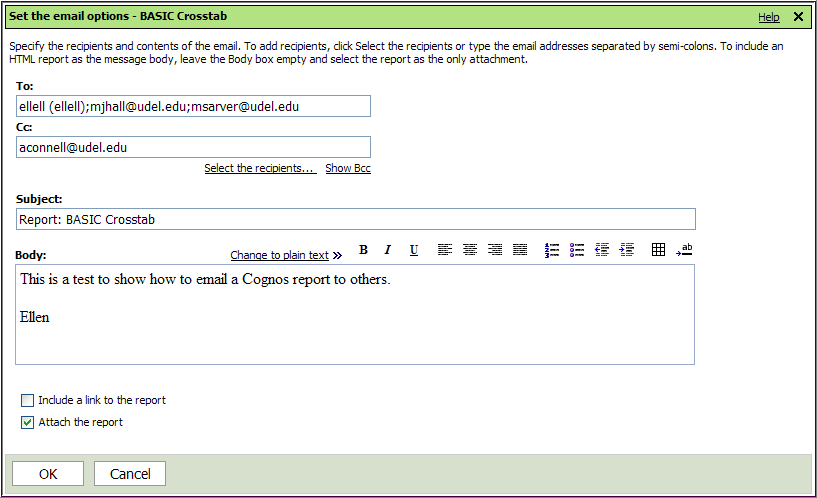


BASIC Crosstab

10. If not already checked, click checkbox for **Send the report by email**

X

11. Click the 2nd **Edit the options…** link



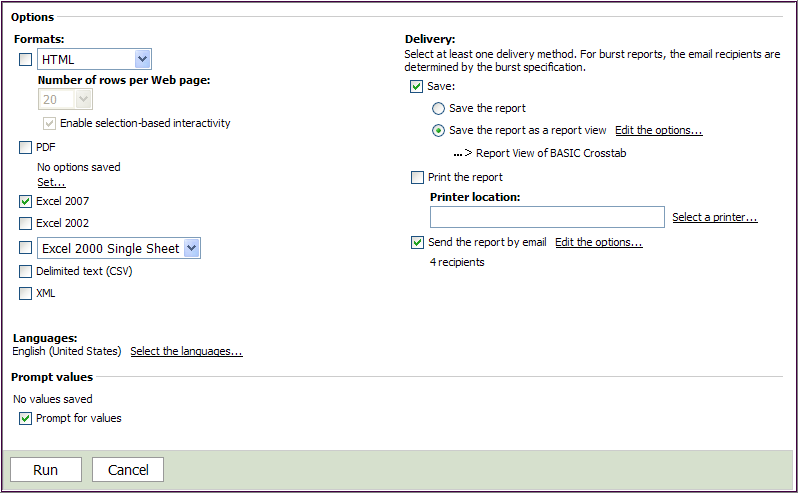
1. Click **OK** button

15. Be sure this checkbox is clicked ON

13. Change **Subject** if needed

12. Type full email address for each *new* recipient, use semi-colons to separate them

14. Type your message here



18. Click **Run** button

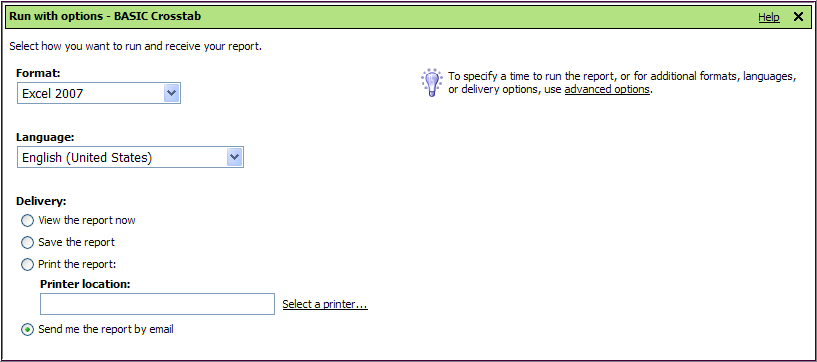
17. Make sure the **Save** checkbox is still checked ON

1. When Prompt page appears select a **Purpose** and **from and to FY/Periods**
2. Click **OK** when Cognos 8 page appears
3. Check your email.

**Advanced options -**

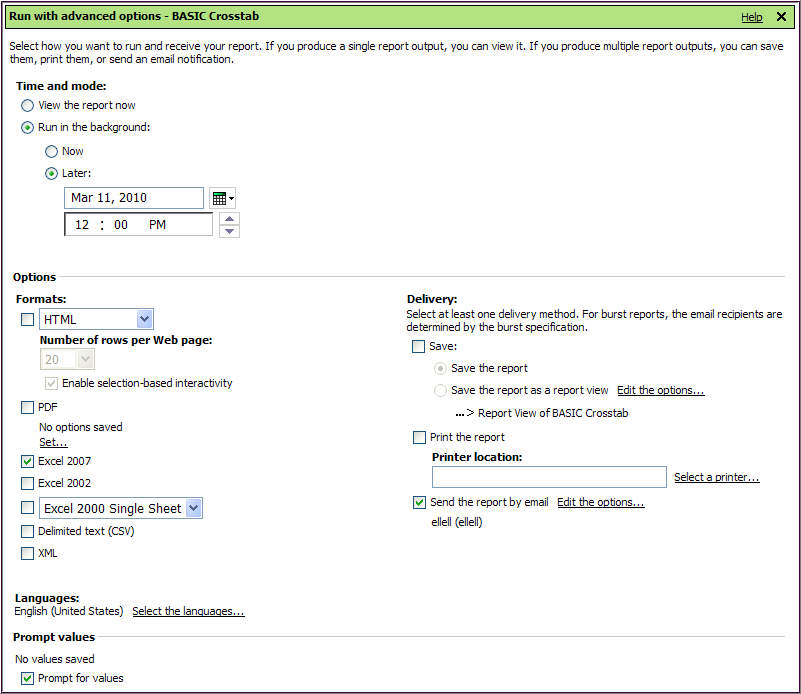
**Scheduling a report to run later and then get emailed to you**

1. If needed, find your report and click **Run with options** 



3. Click the **advanced options** link

2. Click this radio button



7. Choose **Format** (Excel 2007, PDF, etc.)

4. Click radio buttons:

**• Run in the background**

• **Later**

5. Select **date** with calendar button

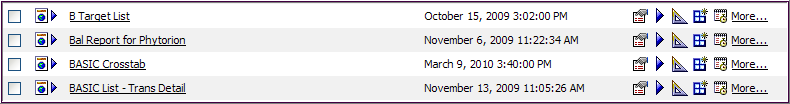
6. Set **time** by typing the numbers or using the up/down arrows

1. Follow the instructions on pages 15-16 (steps 7 – 20) to complete the process.

**Create a report view of a report **

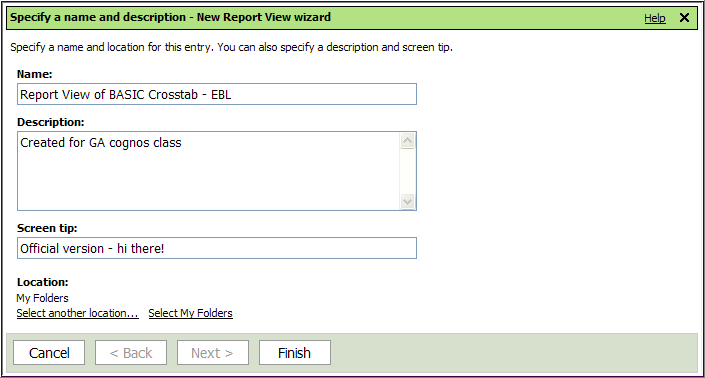
A report view is a reference to another report that has its own set of properties, such as prompt values, schedules, and output results.

Use **report view** to schedule a *recurring* report after saving it in **My Folders**.



1. Click this button 

This opens the **New Report View wizard**:



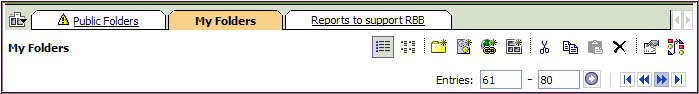
5. **Location** – Click **Select My Folders** (You will not be able to save it in Public Folders or in another location.)

6. Click the **Finish** button

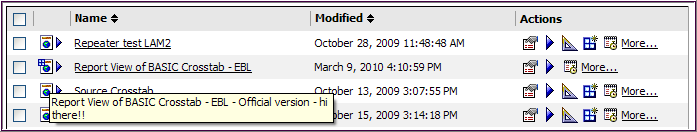
4. This text will appear when someone hovers over the report icon.

2. The **Name** can be changed if needed.

3. **Description** is a useful field to store more info.



1. Click the **My Folders** tab and use navigation arrows (if necessary) to find the Report View you just created.

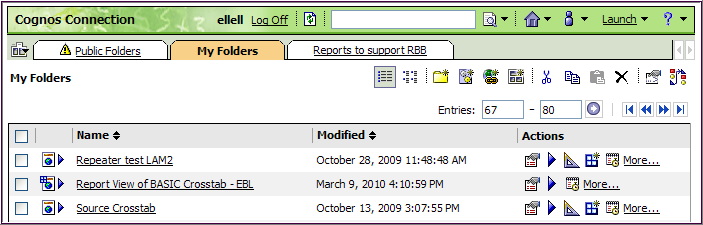


8. Hover your mouse over the report icon to see your screen tip

**Schedule a recurring report **

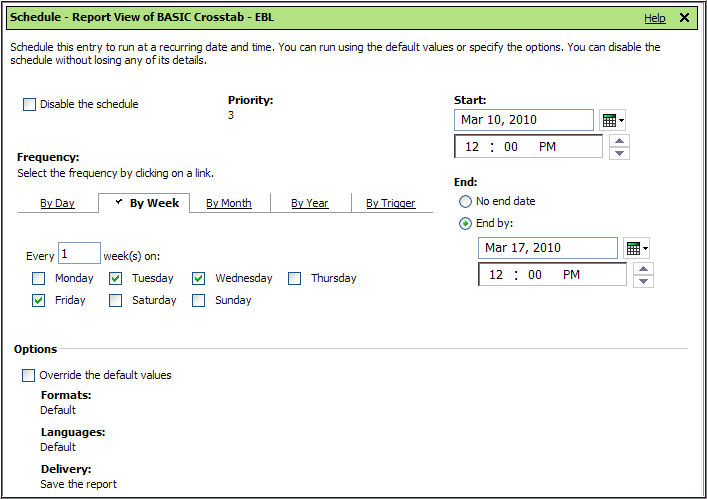
Use this method to schedule a **report view** from **My Folders** to run daily, weekly, monthly or annually. These instructions will show you how to schedule a report and have it emailed to yourself and/or others.

1. Click on **My Folders**
2. Find the **report view** you want to schedule
   * Select **Report View of** **BASIC Crosstab** (the report view you created on the previous page)



3. Click this button 

1. In the **Actions** column, click the **Schedule**  button – do not click the link

****

6. Choose the **Start** date and time

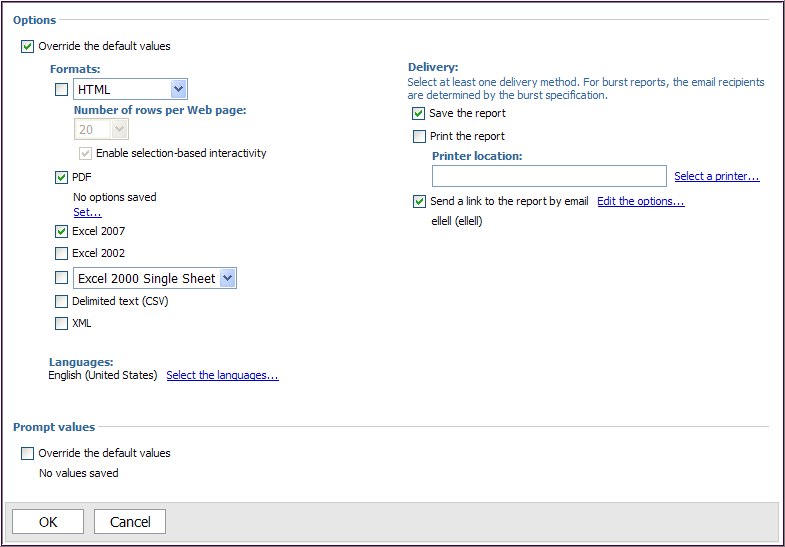
7. **End** - Click the **End by** radio button and choose a date/time OR click **No end date**

4. Select the **Frequency**

5. And then complete the appropriate boxes below.

8. Click the **Override the default values** box ON

The **Options** section opens up for making changes to **Formats** & **Delivery** options.

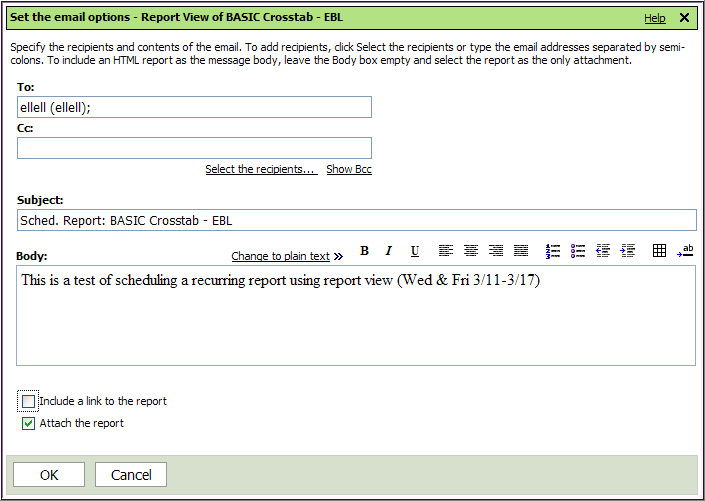
****

3. Click **Send the report by email**

4. Click **Edit the options…**

1. Select the **Format(s)**

2. Under **Delivery,** leave **Save the report** checked ON.

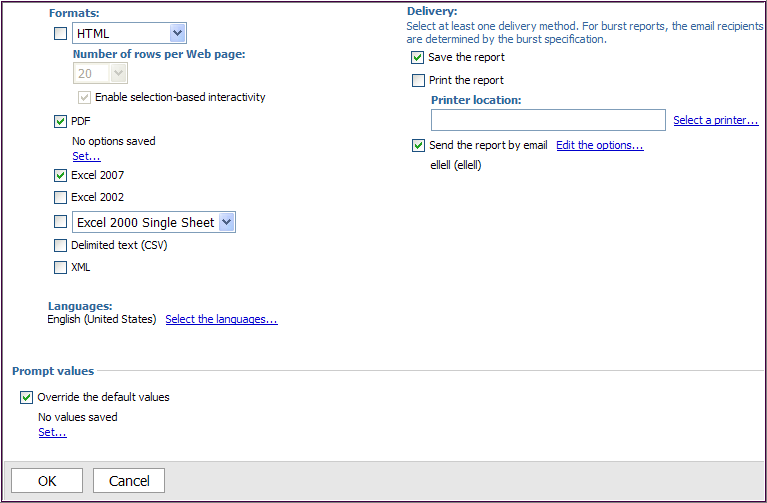


5. Add additional recipients, change the **Subject** and add a message if needed.

6. Check the **Include a link to the report** OFF

7. Check the **Attach the report** box ON

8. Click **OK** button



10. Click the **Set…** link

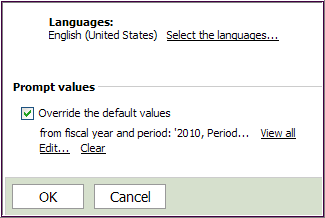
9. *Very Important!*

If the report has a prompt, click **Override the default values** ON.

11. **Prompt page**

* 1. Enter **Purpose(s)** and **from and to FY/Periods** in the prompt page
  2. Click **OK**

The **Prompt values** will reflect your choice(s) – shown below:



**IMPORTANT NOTE**

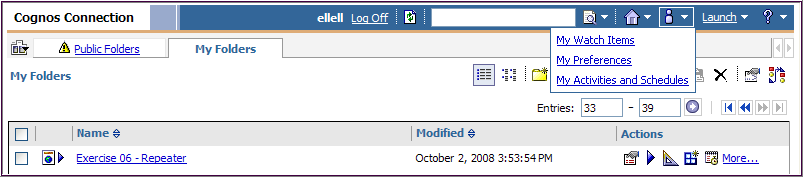
Be sure to update the Prompt default value(s) for a scheduled report when the value changes (e.g. fiscal year)

12. **IMPORTANT** - Click **OK** on the **Schedule** page

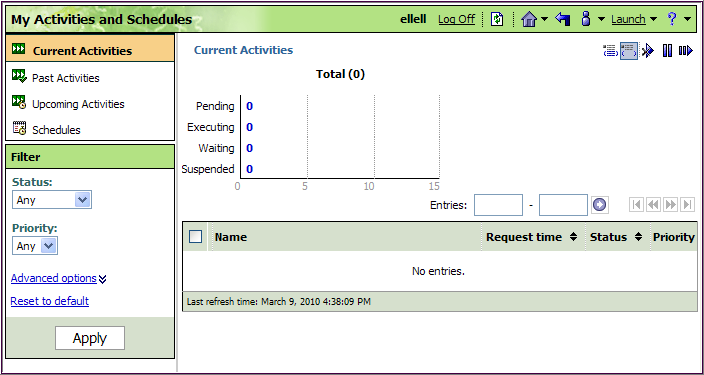
* 1. Your recurring report has been scheduled!
  2. You may come back to the **Schedule** page to modify or disable the report’s schedule as needed.

**My Area** 

**1. My Activities and Schedules** – Use this feature to view your current and past activity as well as your scheduled recurring reports.



1. Click **My Area** and choose **My Activities and Schedules**

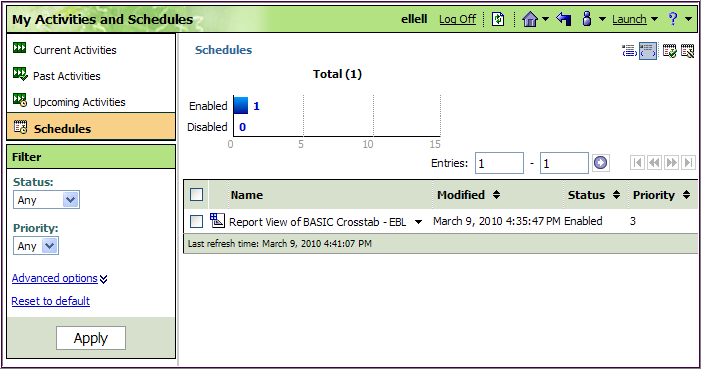


3.Click the **Past Activities** link to see your report history

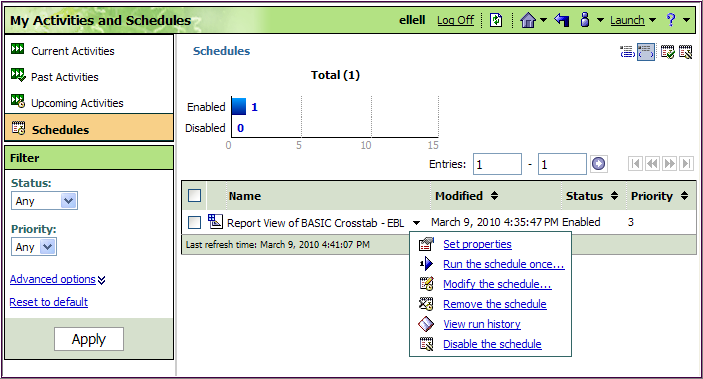
4. **Filter** – change these settings to see more or less history and then click **Apply**

2. **Current Activities** is the default – it displays anything currently running

View or change your scheduled recurring reports:



5.Click the **Schedules** link to see the scheduled reports or report views you have in place

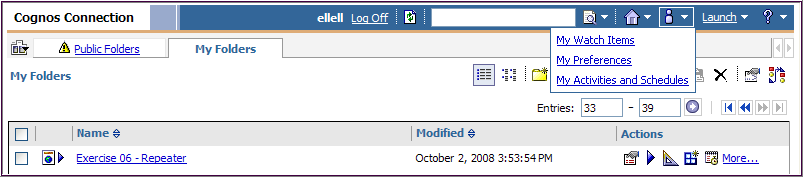


6.Click the **blue triangle** to see the options for each schedule.

Note: you should Remove the schedule after it is completed.

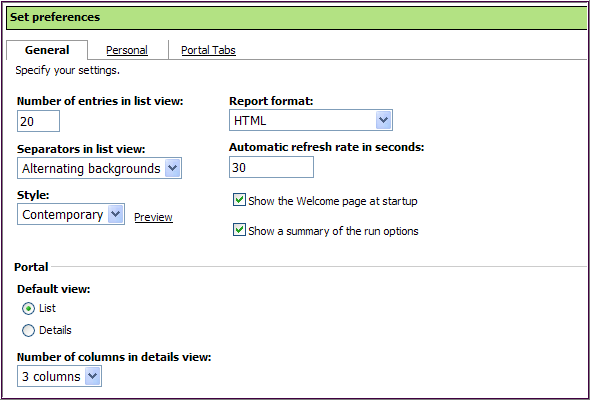
Use the **Return ** button to return to Cognos Connection

**2. My Preferences –** Use this feature to set personal settings and defaults

****

1. Click **My Area** and choose **My Preferences**

* **Set preferences / General tab:**

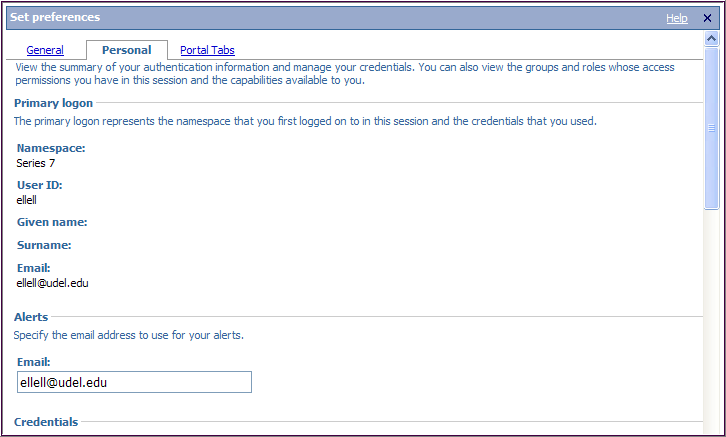
****

**Style** – the color scheme of Cognos can be changed if you want. The Preview link will let you see what the choices look like.

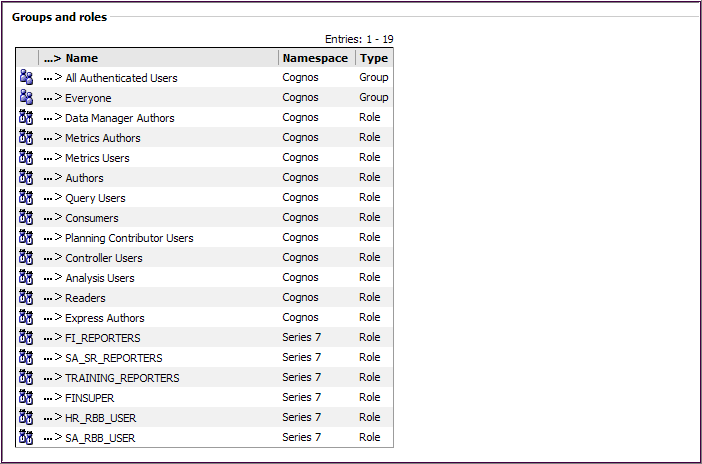
**Separators in list view** - Change to **Alternating backgrounds** to make the list view easier to use.

2. Change settings according to your preferences and click **OK**

**Set preferences / Personal tab:**

****

3. Do not change these settings. Scroll down to see your access **Groups and roles**.

****

4. Your **UD roles** are in all CAPS.

(Ignore the other roles/groups; they came delivered with Cognos and we’re not using them.)

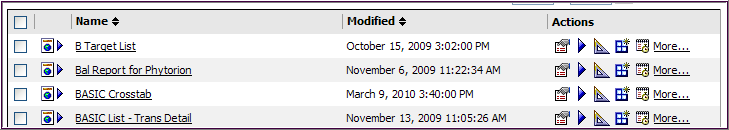
**Other** **Actions** - We’ll look at these additional **Actions**:

 Set Properties

 Open with Report Studio

 More actions

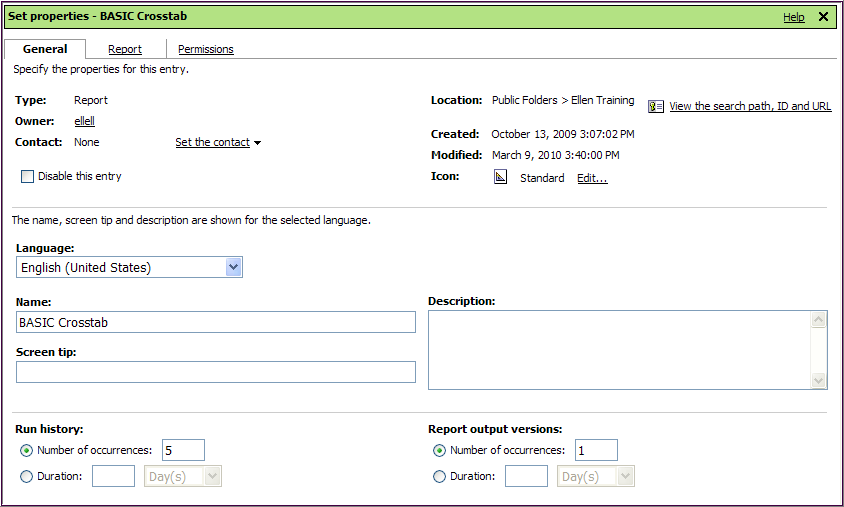
 **Set Properties** – view general information and set output or prompt properties



1. Click this button 

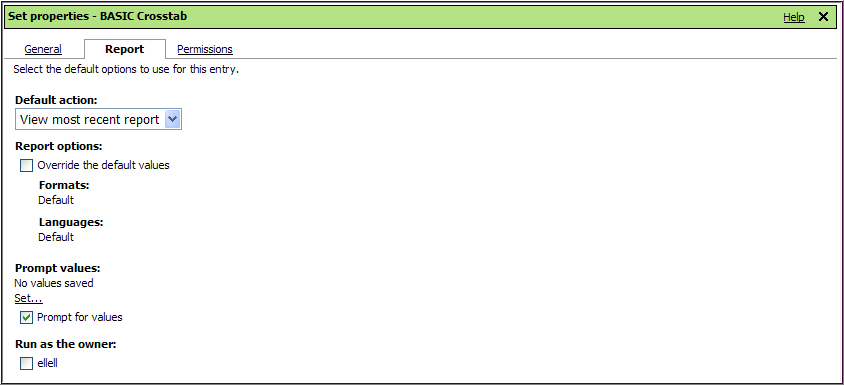
* General tab

Note - Do not change any settings on the **General** tab



2. This section tells you who created the report and when

* Report tab



Click the **X** to go back to Cognos Connection

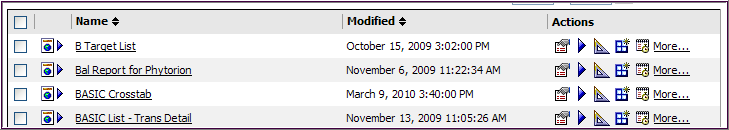
If you were to set the **Prompt values** here, it would “hard code” the value(s) in this report for everyone! Please do not do this.

Note - Do not change any settings on the **Report** tab

**Open with Report Studio**

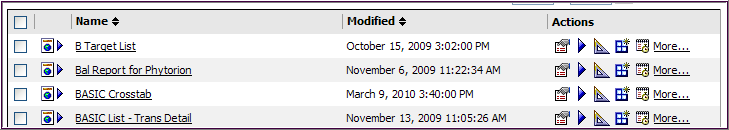


Report Studio is the report writing tool in Cognos; it allows you to modify a report. You will get an error unless you’ve been given security access to Report Studio.

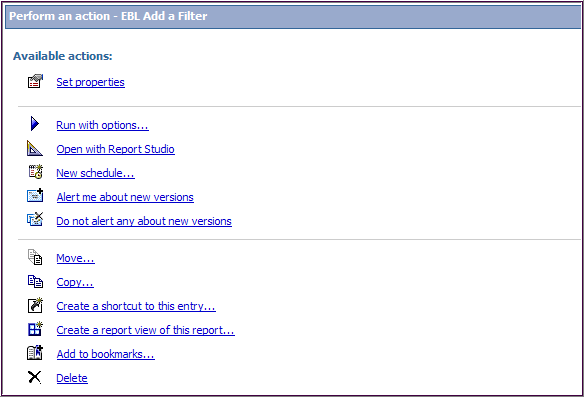


 **More actions**

This link lets you see all the **Actions** available for a given report.



1. Click this link



2. These links will vary from report to report and person to person, depending on each person’s access.

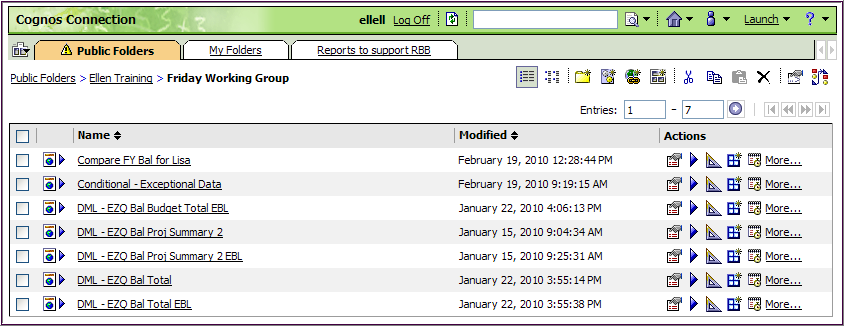
 Use this action carefully! Do not move reports in the **Public Folder** or any of its subfolders. Move reports around in your **My Folders** area however you want.

 Use this action to place a copy of a report in your **My Folders** area. Do not copy a report elsewhere in **Public Folders** without proper authority.

 Use this action carefully! Do not delete any report in **Public Folders** you didn’t create.

**Other Helpful Information**

**Breadcrumbs**

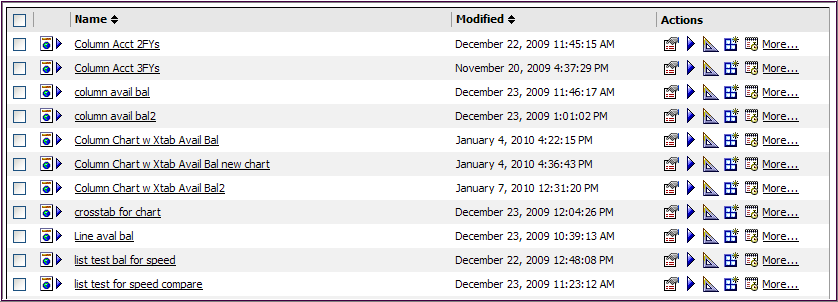
****

Use the **breadcrumbs** to:

• See where you are

• Navigate back to higher levels

**Report Icons**



**FYI about what the icons mean next to the links:**

SNAGHTML334657 HTML Report

SNAGHTML302c17 HTML Report with prompts

 HTML Report View

SNAGHTML40db64 Report with auto-download to Excel

SNAGHTML443c71 Report results to Excel

 Run with prompts, Excel format

 Excel results

 PDF report

SNAGHTML2ebde1 Folder with additional reports/folders

 Shortcut folder – the content actually resides in another folder, it allows users to access the same report from multiple locations.