WRIGHT STATE UNIVERSITY

Institutional Research Training Guide

**COGNOS
CONSUMER
TRAINING GUIDE**

May 2021
v.4

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Introduction

The purpose of this training guide is to familiarize users with the basic features of Cognos. It will include general information for running reports already created in the Cognos environment.

Objective

Learn to utilize basic navigation and features of Cognos to run reports based upon information previously entered into the Banner database or other data sources.

Agenda

I. Access Cognos
II. Access Cognos Report
III. Run Cognos Report
IV. Save Cognos Reports
V. Share Cognos Reports
VI. Schedule Running of Cognos Reports

Authors note: Reports shown in screenshots may not be publicly viewable. They are either training reports for IR staff, proof of concept demos, or used for testing purposes only.

Branding may also change over time. This can include different color schemes that feature WSU colors. All functionality should remain the same. Any functionality changes will be updated in a new version of this training document.

COGNOS OVERVIEW

Cognos Studios

Cognos is a reporting application that allows users to write and run reports by analyzing and correlating the data stored in the Banner Database or other sources.

There are generally two end-user roles at Wright State University:

Consumer - A user who is able to enter Cognos and run reports that have been prepared by another author.

Report Writer - Users who write and generate reports in Query Studio, or create and run complex reports in Report Studio.

Most of the reports you will be running as a *Consumer* were created in Report Studio.

For additional information regarding Cognos,

- Requests for additional reports submit a ServiceNow request to the Cognos Team under Access Requests "Cognos Project Request Form" at: https://www.wright.edu/information-technology/forms#access-requests
- For technical assistance, contact the CaTS Help Desk at (937)775-4827

The Operational Data Store (ODS)

Cognos reports are designed using models that are built using objects from Operational Data Store (ODS). The ODS receives its data from sources such as Banner, meaning the ODS does not contain 'live' data; the data is refreshed nightly. Therefore, if a report is run in Cognos and the results do not appear right (in Banner) and the correction is made in Banner, that change will not be reflected in Cognos until the next refresh. However, if the report is directly pointing to Banner data, it will contain 'live' data.

Student Privacy, Release of Education Records, and Data Security (FERPA)

Wright State University, in accordance with FERPA, has designated the following information about a student as *public information*:

- A student's name
- All addresses of a student, including e-mail addresses
- Telephone listings
- Major field of study
- Number of hours registered
- Full-time or part-time status
- Class standing (freshman, sophomore, junior, senior, graduate, or professional)
- Dates of attendance
- Degrees awarded and total hours earned
- Special honors and awards
- Most recent previous educational agency or institution attended
- Participation in officially recognized activities and sports
- Weight and height of members of athletic teams

COGNOS reports containing student data beyond that listed above should ***NOT*** be sent out via email. Instead, reports containing private information should be sent as a link that will require the receiver to log into Cognos. Instructions on how to do this are provide further in this document.

Saving Cognos Reports containing private data should be limited to your departmental Restricted drive. If you do not have access, contact your Supervisor to request access to the R Drive from CaTS. It is good practice to save all Cognos reports to network drives (H, K, R), Reports containing private data should ***NOT*** be saved to OneDrive or SharePoint sites. This ensures data protection and prevention of data loss due to hardware failure or accidental deletion. See CaTS link to see what can be saved where if in doubt.
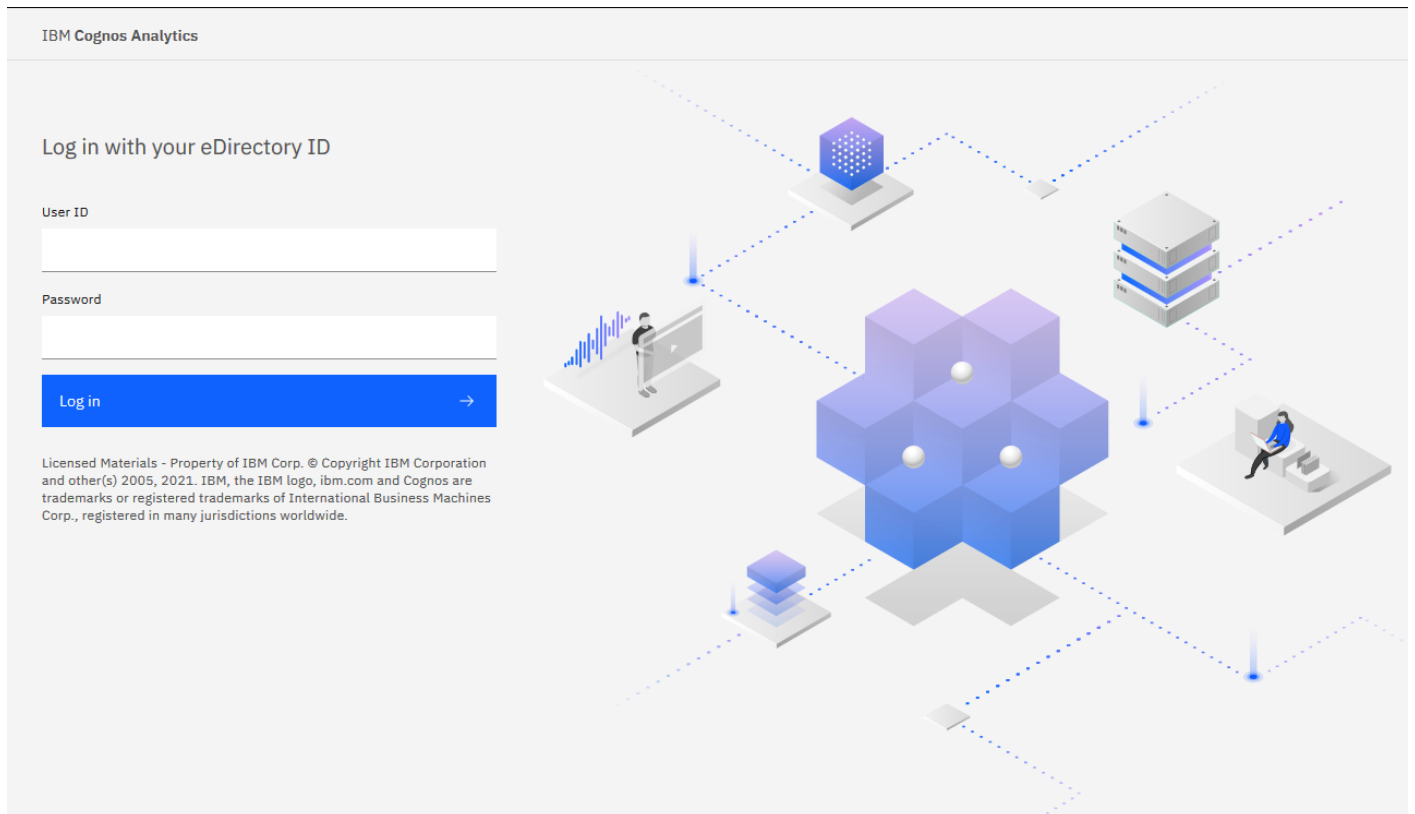
For the complete Wright State University Policy on Student Privacy and Release of Educational Records – FERPA such as the definition of an Educational Record and the Release of Educational Record without Consent, please go to: https://policy.wright.edu/policy/3010-student-privacy-and-release-educational-records-ferpa

Additional Resource: CaTS University Classification and Risk Matrix
https://wrightstate.service-now.com/sp?id=kb_article&sys_id=a207b44c134e57007e89fabed144b0db&table=kb_knowledge

ACCESSING COGNOS

Follow these steps to access Cognos:

1. Open your browser (Firefox preferably)

2. Enter the new Cognos link: https://cognos11.wright.edu/

3. Enter your W-ID and the password, then click on the Log In button

Complete list of supported browsers is available at:
https://www.ibm.com/software/reports/compatibility/clarity-reports/report/html/prereqsForProduct?deliverableId=352864D0DB1411EA946583CF0C766A83#sw

COGNOS WELCOME PAGE

The Cognos Welcome Page is your home page in Cognos. Your role at the university will determine your access to folders and reports.

The Welcome Page includes many features to allow for simple navigation to data in the Content Menu as well as the workspace of the application.
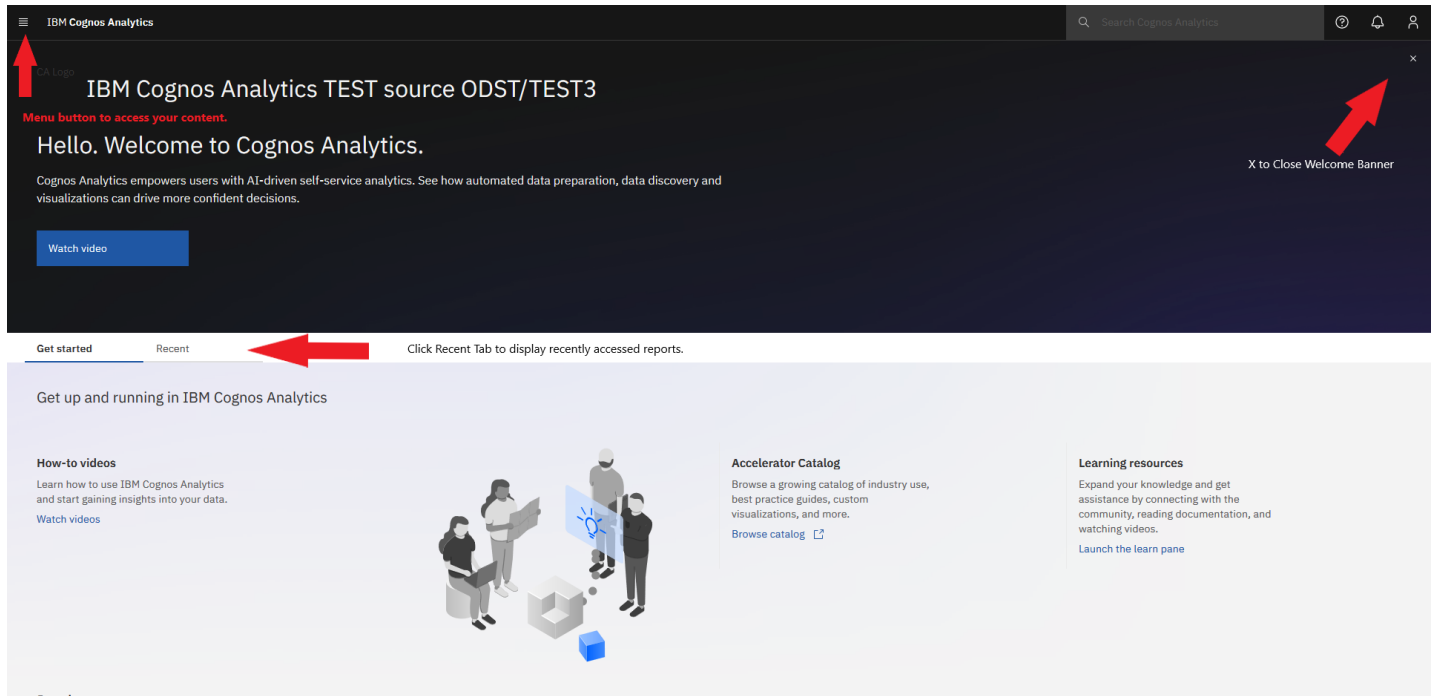
The Welcome Page offers quick references for How-To Videos and other learning resources. A Recent tab will display all your recently ran/accessed reports for quick access. Alternately, the Welcome Page has a Search Box in the tool bar at the top right to quickly search for reports.

ACCESSING REPORTS

Reports in Cognos can be found by browsing in the folders containing the reports, or by searching for individual reports.

Icon notes: Cognos contains both Reports and Dashboards. Reports are denoted by 🗒 Report and Dashboards are denoted by 📅 Dashboard

Finding Content

Views

From the Menu (hamburger icon) on the top left, reports can be accessed by clicking the Content folder and navigating to reports in either My Content ("My Folders" in previous version) or Team Content ("Public Folders" in previous version), or by selecting the Recent reports list in the Menu.

Two views are available to see content. List View of Tiles View.
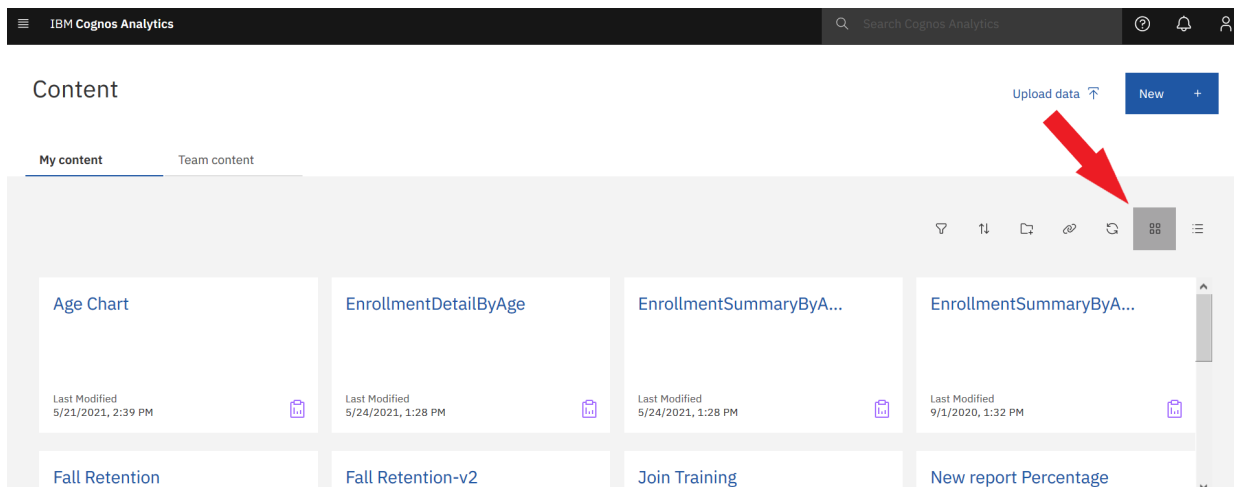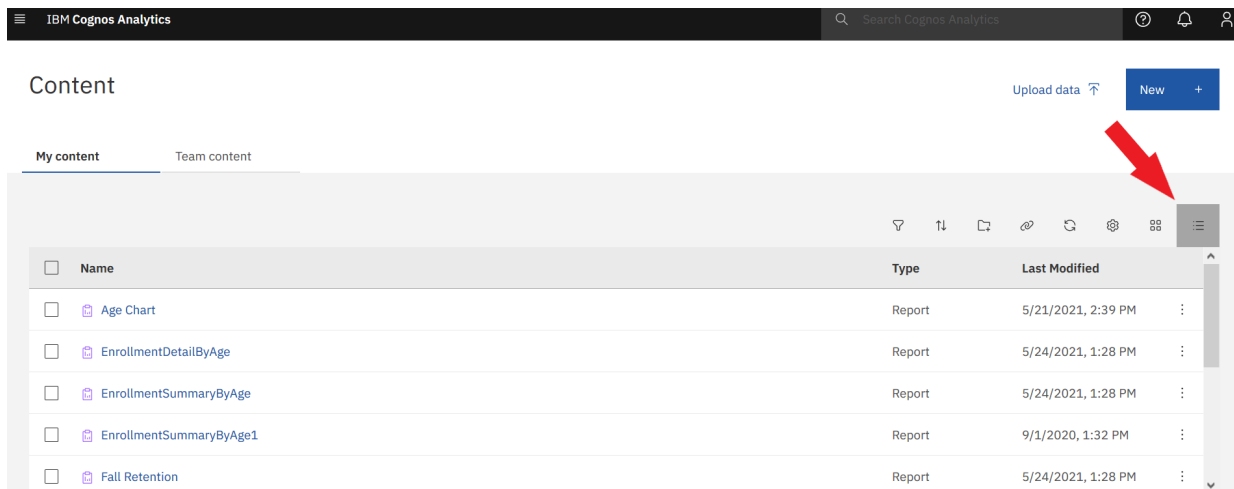
Search

Cognos reports, dashboards, stories, data, files, folders, packages and other items from the My Content or Team Content folders. Search is often the quickest and easiest way to find these items.

Items can be found by typing keywords into the Search field and tapping the Enter key. Report text items, such as table or column labels, URL items, and templates may also be found using the dynamic Search feature which will find full and partial words as entered. Search does not return results for archived content, but archived content from a report can be retrieved if the report is saved in one of the user folders.

Search Filters

If a search returns too many results, the Filter options may be used to reduce the number of items in the list. The filter option is only available once an initial search has been requested, via the Filter Icon at the top of the search panel.


Saving Searches

Once a search has been completed and results listed, the search may be saved for later use with the Save

Icon at the top right of the search pane.

Save search 🖫

Accessing Saved Searches

Saved searches can be found simply by clicking in the Search Box and selecting the desired saved search.

🔍 Search Cognos Analytics

Saved searches

Spring Headcount Enrollment
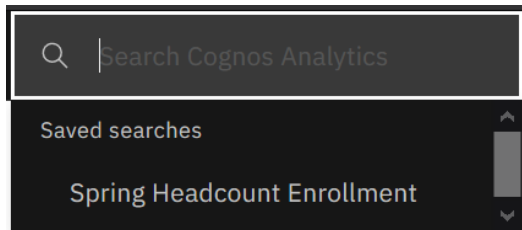
My Content Folder

The My Content folder is a personal file space to save reports and other Cognos content. Only the individual user can see the items stored in their My Content folder.

Team Content Folder

The Team Content folder, referred to in previous versions of Cognos as the Public Folder, contains information separated into business domains, to organize access to reports by user access as granted by the Office of Institutional Research and Effectiveness.

The Team Content folder is further organized by structured sub-folders. Access to folders and sub-folders is based on the security level of the user. Users are granted access to the reports based on user role and responsibilities.

RUNNING COGNOS REPORTS

Cognos reports requires users to select how the report contents are delivered based on the end-users need. Based on the default settings created by the report developer, a report can be setup to run by default in a particular format. (ex: HTML/PDF/Excel)

Using the Search to find the desired report, simply click on the report name. For example, to run the pictured report below, just click 'Spring Headcount Enrollment' and the report will run in your browser.

| ☐ | 🗎 Spring Headcount Enrollment | Team content > Dashboards | Report | 3/30/2021, 11:05 AM | ⋮ |

Alternatively, reports can be run in a variety of different way based on the desired output. To initiate these alternative options, right-click in the highlighted box of the report needing to be run

or left-click on the ellipsis ⋮ next to the desired report.

This option is best for users who want the report data in Excel or PDF form. It is also a way to schedule a report to run at a later date. That will be covered in another section.

Run as

Create report view

View versions

Share

Copy to

Add shortcut

Properties

Details
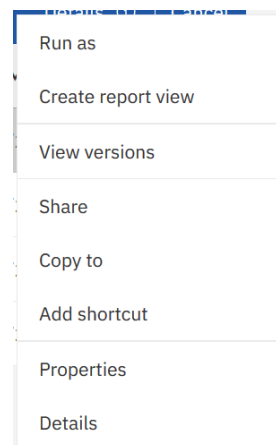
*Note:
- Menu options and functionality may differ based on user permissions.
- Running a report to Excel or PDF may take longer to process than running the report in the browser (HTML). The delay depends on the report size.

Run As pop-up options

- **Run in Background** allows for advanced report options like running the report at a future date or delivering the output in multiple formats (e.g., HTML, Excel, and PDF at the same time).
- **Format** – run reports in the browser (HTML), PDF, Excel, CSV, or XML depending on your need.
- **Prompt me** – displays filtering options, if available, to create a more drilled down report.

Run as

🟢 Run in background

◉ Now

○ Later

🟢 Prompt me

You will be prompted for input before the report runs.

🔍 Find

Format

☑ HTML   ☐ PDF   ☐ Excel
   Edit options
☐ Excel Data   ☐ CSV   ☐ XML

Accessibility

☐ Enable accessibility support

Delivery

☑ Save

   ◉ Save as a report view

     Name

     Report view of Spring Headcount Enrollment

     Location
     My Folders /
     Select another location

☐ Send report by email

☐ Send report to mobile device

☐ Print

Languages   English ✕

Summary

Format
HTML

Languages
English

Reset defaults ↻

Cancel   Run

Asterisk (*) denotes a required field.

To select multiple options, hold the CTRL key to make selections.

Click **OK** after the filtering options to run the drilled down report.

Inside the report (HTML)
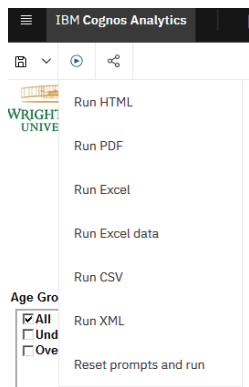
If you ran the report in HTML format with or without filters, the **Play** button at the top left of the report allows you to rerun the report in a different format or to reset the prompts to allow you to select different variables or see all data when the report is rerun

Also located in this area, the **Save** button allows you to save your report to the *My Content* or *Team* folders. Based on user access, you may or may not see the Edit button.

SAVING REPORTS

Cognos allows generated reports to be saved as the Report View, meaning the information is saved as of the time and date of the running. They can be used for comparison between other saved views or as easy access to a report that is updated or run often.

Saving a Copy of the Report
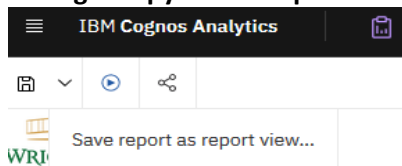
The *Save* button is in the top right corner of the report. Select it and choose the *Save report as report view…* option.
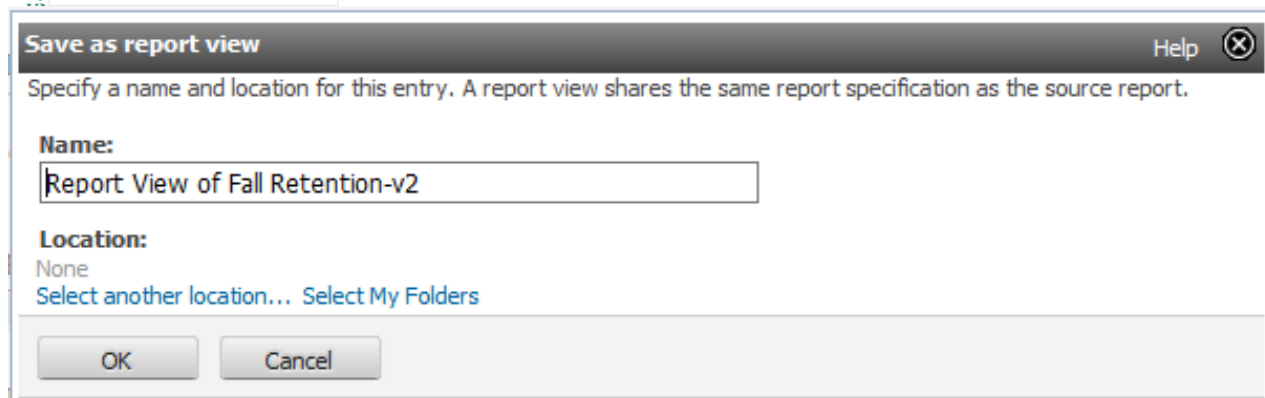
DO NOT change the name of the saved report. This will allow Cognos to efficiently store several versions of the same report with the same name, keeping the run dates and times as identifiers.

Cognos reports can be saved in either **another location** on the computer or in the **My Folders** area of Cognos by selecting the correct link. We recommend saving to the **My Folders** section.

Note: Please refer to the security section if saving reports outside of Cognos to ensure proper data security.

Saved report options

Saved views in the **My Content** folder can be viewed or rerun from that folder. Additional settings are available for saved versions, especially under **Properties**. These additional options are found by clicking on the ellipses or selecting Properties as indicated by the red arrows.

The Report and Schedule tab in Properties

The **Report** tab offers a variety of options to adjust a saved report. Users can change values, format of the report, PDF options, change the language (not tested), and specify the number of occurrences, or report views. This is helpful when running quarterly reports. For example, setting the number to 4, the past 4 runs of the report are saved and any older reports are discarded. Setting the number to zero means users can save an unlimited number of report views and remove unnecessary reports manually when needed.
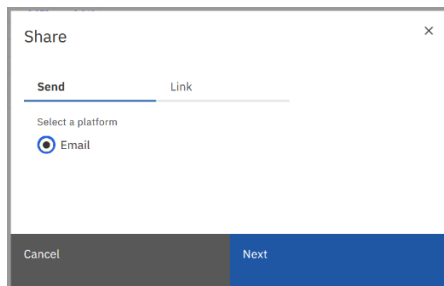
SHARING OF REPORTS

Cognos reports run in a web browser (HTML) can be shared, via email or by copying a link to the report, to other Wright State end-users with Cognos access.
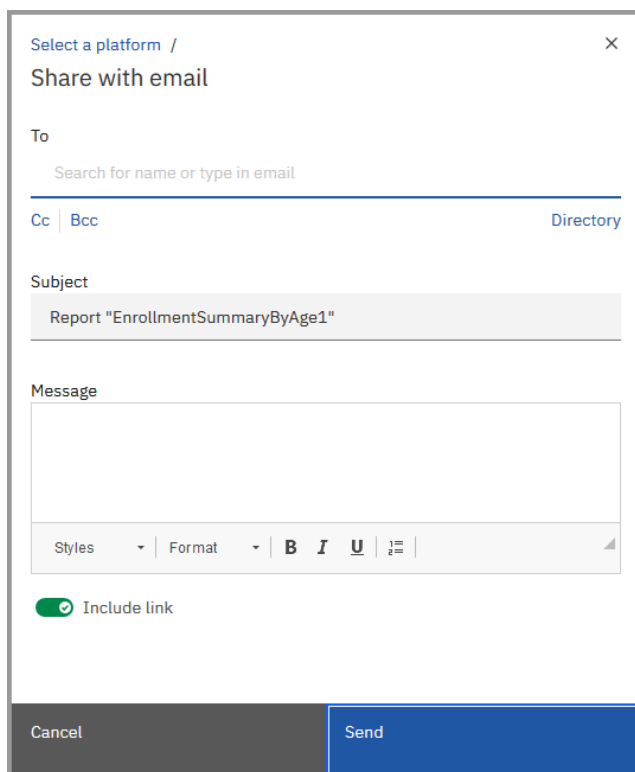
Sharing via Email

Step 1: Click on the "Share" icon located in the top left.

Step 2: Click on "Email" radio button and click "Next"

Step 3: Enter Wright State email addresses of those who will receive the report, a message (not required), and click the Send button.

End-users receiving the emailed report will get a message displaying the Report name along with a button they can click to open the report, for example:

Report: High School Enrollment Report
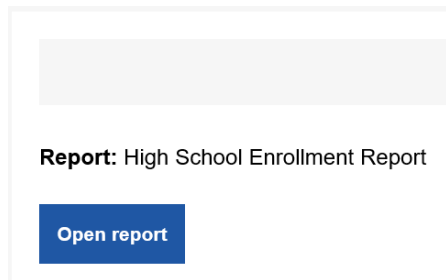
A browser window will open to the Cognos 11 sign-in page for them to login to view the report.

Sharing via Link

Alternatively, users can share a Report using a Link that can be copied to Teams, SharePoint site, Email, or other communication methods to link other users to the desired report.

To generate a link, click the 'Share' icon, then the Link tab, and click the 'Copy' button. Once the link is copied, it can then be pasted by right-clicking and selecting paste in its desired location.
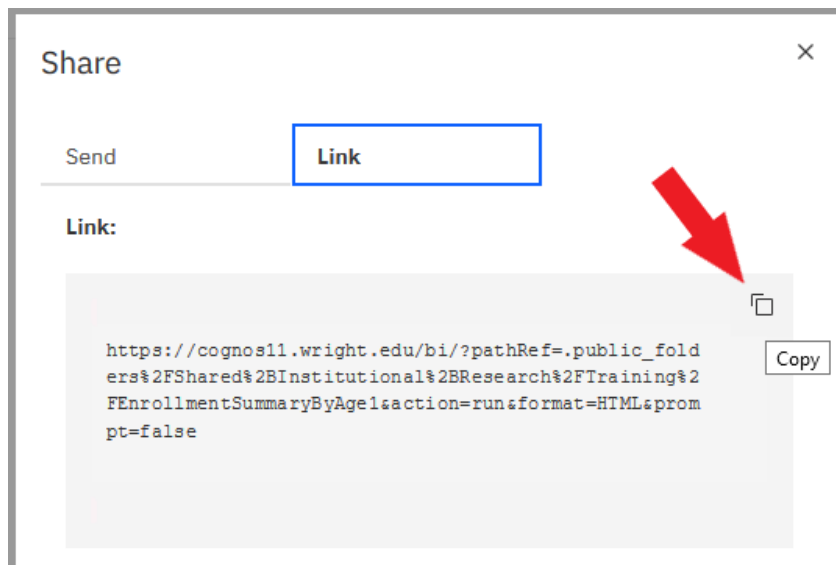
SCHEDULED RUNNING OF REPORTS

From the **Properties** option, selecting the **Schedule tab** allows user to set up reports to run automatically. To get here, go to *My Contents* folder, click the *ellipsis* next to the **Report View** that was saved, select *Properties*, and then the *Schedule tab*. The tab will show *No schedules created*. Click the **Create Schedule** button.

From the **Schedule** panel, parameters can be set to schedule time, frequency (if the report is updated regularly), as well as other options like delivery method and values.

Frequency – select when a report is run. Daily, Weekly, Monthly, Yearly, and by a specified trigger. Daily time intervals can also be set by the minute or the hour.

Period – this option allows you to specify the start and end date of a report schedule.

Advanced – set the priority level of multiple reports. If multiple reports are scheduled to run, a priority number can be assigned, 1-5. Reports set to 1 will run first.

The **Options** tab allows users to adjust the Format and Delivery method of a Scheduled report. The Summary on the right shows the complete details of the schedule as well as allowing users to reset options to the default settings as shown below.
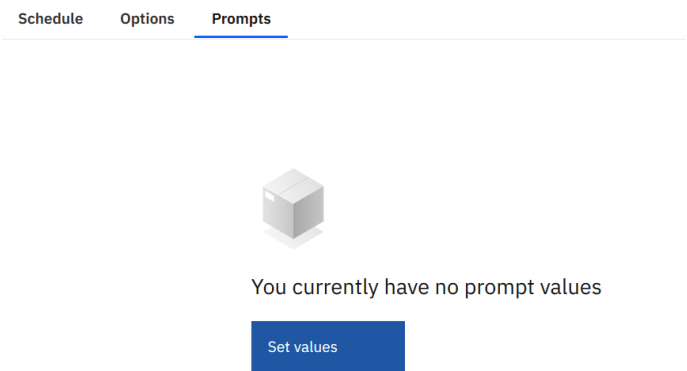
The **Prompts** tab allows users to define what values they'd like to see in scheduled reports. Selecting **Set Values** button will open the values prompt window for users to specify what values they want to see. By default, all values will be shown.
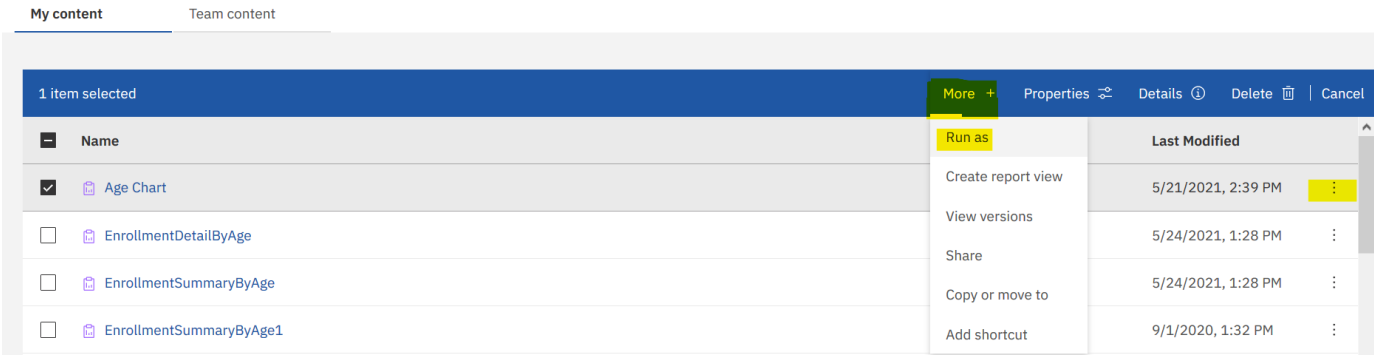
Schedule   Options   **Prompts**

You currently have no prompt values

Set values

RUNNING REPORTS IN THE BACKGROUND

Some Cognos reports are large and may take time to run. Instead of waiting, there's an option to run a report in the background and either save the output to the My Contents Folder or send an email link to the output.

Step 1: Navigate to the report you wish to run in the background, select "More+" or the ellipsis to the far right, and select Run As.

Content

My content   Team content

	Name		Last Modified	
1 item selected		More + Properties ⇄ Details ⓘ Delete 🗑 ｜ Cancel		
☑	Age Chart	Run as	5/21/2021, 2:39 PM	⋮
☐	EnrollmentDetailByAge	Create report view	5/24/2021, 1:28 PM	⋮
		View versions		
☐	EnrollmentSummaryByAge	Share	5/24/2021, 1:28 PM	⋮
		Copy or move to		
☐	EnrollmentSummaryByAge1	Add shortcut	9/1/2020, 1:32 PM	⋮

Step 2: Enable Run in Background toggle button. By default, it is in the 'Off' position.

Run as

Run in background

○ Now

◉ Later   2021-05-25 📅   8:42 AM

Prompt me

🔍 Find

Other options in the 'Run as' window include the option to initiate the running of the report 'Now' or schedule it to run at a later time.

Prompt me allows the report to prompt for user input such as filters the end-user may use to parse down the report to more specific data points. This is optional.

Step 3: Change Format, if desired.

Format

☑ HTML	☐ PDF	☐ Excel
Edit options		
☐ Excel Data	☐ CSV	☐ XML

Accessibility

☐ Enable accessibility support

Format gives the end-user the option to choose the format of the output. HTML (web browser) is set as the default.

Step 4: Select delivery method.

Saving the output is required when running a report in the background.

For ease of access later:
- Select 'Save as a report view'
- Keep the default Name
- Click 'Select another location' and choose the My Content/My Folders option

At this point, the end-user can select the 'Run' button on the lower right. When the report is finished running, the output will show up in the My Content folder.

Additionally, emails can be sent alerting End-Users that the ran report is ready. Continue to the next page for instructions.

To use the Send report by email option, select the check box next to it, then select 'Edit details.'

In the 'Edit details' window, enter the desired email address or addresses. End-Users can also CC or BCC other users if desired.

Change the Include Link toggle to 'On.'

Select the left-pointing arrow on the top left to return to the 'Run As' screen or select the 'Run' button to in the bottom right to run the report.

Security note: Please do not use the 'Attach report output' option, especially if the report contains private, sensitive data. Refer back to the Security section of this document if unsure.

Send report by email

To

Joshua Stamper ×

Cc | Bcc

Subject

A new version of Age Chart is available

Message

Include the following with my message

Include link

Attach report output