

## What is Cognos?

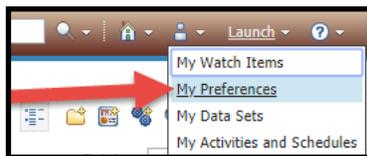
1. Cognos is a tool to create reports from data.
2. Banner data is copied nightly into the **Operational Data Store (ODS)**.
3. In the ODS the tables and data are converted to Cognos names and the data is grouped and joined.
4. Cognos pulls the data from ODS and organizes it into packages such as Student and Finance.
5. The **Metadata** (ODS Dictionary) shows how the Banner tables translate and how the data is organized.
6. You can find the Metadata at rowan.edu/asa.

## Log into Cognos

1. Cognos works best in the Internet Explorer browser.
2. Go to <https://cognos.rowan.edu>.
3. Log in with your Rowan credentials.
4. Select **My Home** from the main menu.

## My Area

1. Select the **My Area** icon (it looks like a little person) and then select **My Preferences**.
2. Explore the **General** tab to see preferences that you can adjust such as Number of entries in a list, **Separators** in list view, **Style** and **Default View** (List or Details).
3. Choose your default **Report** format. By default it is set at HTML (to open in the web browser).

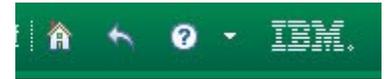


## Folders

1. **My Folders** tab is a private tab to which only the logged-in user has access. This tab is used to store reports created by the user.
2. **Public Folders** tab is a common place which provides access to Packages, Reports, and Metadata. This tab is controlled by the Cognos Administrators and cannot be edited by users.
3. To view a report that was created for you, under **Public Folders**, select **Rowan Offices Reporting**.
4. Once selected, you will only see folders to which you have access. Each folder contains data that is relative to a specific group of users.



## Navigation



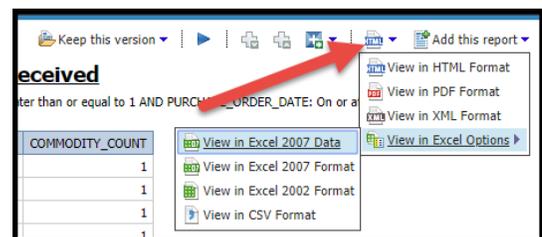
1. On the top menu, the House icon will take you back to the first screen of Cognos. The **Return** icon is the rounded arrow which will return to the last page visited.

## View Reports

1. Open a folder to see your reports.
2. Select the hyperlinked name of a report to run it.
3. Select parameters if prompted.
4. Use the shift key to select multiple consecutive items or the control key to select multiple nonconsecutive items.
5. Select **Finish** at the bottom left of the screen.
6. The report will open in the Cognos window. Use the buttons at the bottom of the page to go to the next page or the end of the report.

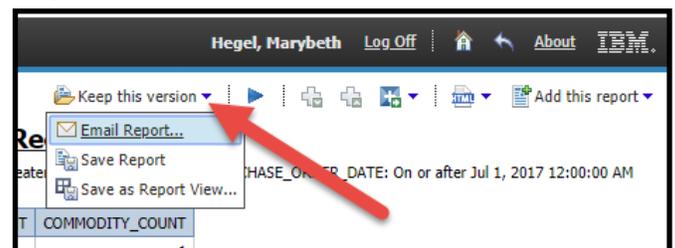
## Export Reports

1. To export a report, select the drop-down arrow next to the **Format View** icon at the top right of the screen.
2. You will then be able to export the open report as an HTML, PDF, XML or Excel document.
3. Excel 2007 Data will just contain the raw data. Excel 2007 Format will be formatted with the Rowan logo and with merged fields.
4. A new window will open with the file located at the bottom of the screen. Click on the file to open it.
5. Make sure that your pop-up blockers are off for Cognos.



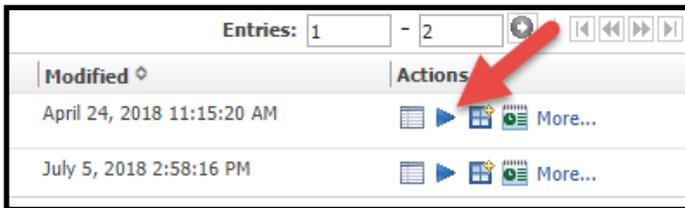
## Email Reports

1. Reports can be Emailed, Saved or Saved as Report View quickly from the toolbar.



## Run with Options

1. Under the **Actions** menu, to the right of the name of the report, select the **Run with Options** icon (the arrow button).



2. You can choose different Formats, or to View, Save or Email the report. Finally, you can prompt for Values if any are available. Once the selections are made, select **Run**.
3. Select **Advanced options** at the top right of the screen for more options.
4. For large reports that may take a while to run, Select **Run in the background** and the time, format and delivery options.
5. Select **Run**.

## Saved Reports

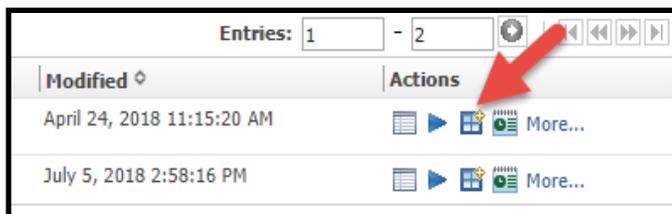
1. If you have chosen to save a report, you will see the Output Version icon in the **Actions** menu next to the report name.



2. Select the icon, then select the report you would like to view.

## Create a Report View

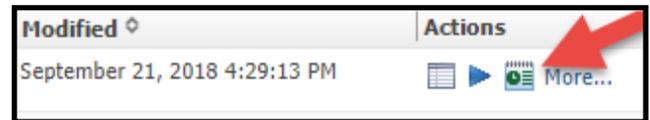
1. Create a **Report View** of a report in Public Folder and then save it to My Folder. This will enable you to Schedule, Save or Run the report in the Background.
2. The Report View is linked to the parent report in the Public Folder. If the parent report in Public Folder is updated with a newer version, the update will be reflected in your Report View.
3. Create a Report View by selecting the Report View icon in the **Actions** menu to the right of the report name.



4. You can change the default name of the report if you wish or add an additional description.
5. Under Location, choose **Select My Folders** then **Finish**.

## Schedule Recurring Reports

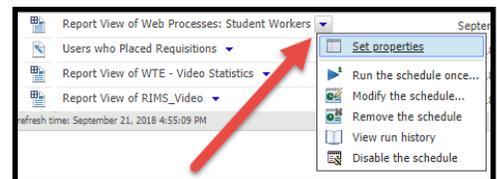
1. In **My Folders** select the **Scheduling** icon in the **Actions** menu to the right of the report name.



2. Select the options for **Frequency**, **Start Date** and **Time**, **End Date** and **Time**.
3. Select **Override the default report options** to choose report output options (such as Excel or PDF).
4. Select **Override the default values** and then the hyperlink. **Set** to choose the parameters or filters of your report.
5. For delivery options, you can Save the report or send the link or attachment via email. Select the **Edit the email options** hyperlink and select **Attach the report** (such as PDF or Excel) to the email. Select **OK**.
6. Select **OK** to complete the schedule.

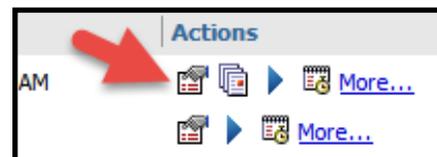
## Modify Schedules

1. Select the **My Area** icon at the top right (the icon that looks like a person), then select **My Activities and Schedules**.
2. In the upper-left corner are the options to view current, past, and upcoming activities. Select **Schedules**.
3. Select the drop-down arrow next to the name of the report to modify a schedule.



## Report Properties

1. Access **Set Properties** through the icon to the right of the name of the report in the **Actions** menu.



2. On the **General** tab, in the **Run History** you can choose the number of occurrences to save of a report (in the archive). In the **Report Output** you can indicate the number of outputs of a report that will display in the Saved Reports.
3. In the **Report** view tab change default action from View most recent report to **Run the report**. If it remains at View most recent report, you will only see latest saved output instead of running the report again.