Cognos 10.2

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Learning Objectives

The learner will be able to:

1. Log into Cognos through Citrix (RowanCloud)
2. View reports created for their department.
3. Export reports to Excel.
4. Save or email reports.
5. Create a report view of a report and save in My Folders.
6. Schedule a report to be emailed or saved and delete schedules.
7. View saved reports.
8. Customize look of their Cognos home page.

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What is Cognos?

Cognos is a tool to create and view reports based on Banner data.

Each night, the Banner data is copied to the Operational Data Store (ODS).

During this process, the Banner table names are converted to natural language
   For example SORLCUR_DEGC_CODE becomes Degree

In the ODS, the data is grouped and joined in logical reporting views
   For example relationships between students, GPA and majors are established

Cognos pulls the data from the ODS and organizes it into groups or packages
   For example the Student Package would include fields such as addresses, academic period, advisors, courses, major, degree etc.

The consumer then can use Cognos to create and view reports based on the Banner data from the ODS.
Consumer Reporting Tool

Banner Data

Copied Nightly

ODS Operational Data Store

Hundreds of tables

Cognos

Data is grouped and joined

Data is pulled from ODS and packaged into groups such as Student, Finance, Payroll, etc.

Tool to create reports

Metadata

ODS Dictionary

Shows how the data is organized and how the Banner tables translated
Cognos Access

You can access Cognos from Internet Explorer - http://cognos.rowan.edu

Or

Cognos 10.2 can be accessed from the Citrix Receiver, in the Administrative Folder.
Log In to Cognos

The reports within the Cognos Production Portal access data from the ODS Production Database.

The ODS Production Database is refreshed every night from BANNER PROD.

The reports within the Cognos Test Portal access data from the ODS Test Database.

The ODS Test Database is refreshed every two weeks from BANNER FORTNGHT.

Once you access either Cognos Prod or Cognos Test, you will be prompted to Log In using your Rowan Network ID and password.

Enter your information and then OK.

From the Welcome screen, select My home, which will open the Cognos portal tabs.
Every authenticated user can see two default tabs: Public Folders and My Folders.

My Folders tab is a private tab that only the logged-in user has access to. This tab is to be used to store reports created by the user.

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.
Under Public Folders, you will see Rowan Offices Reporting. Once selected, you will only see packages (folders) to which you have access. Each package contains data that is relative to a specific group of users.
View Reports

Select an underlined name of a report to run it.

Select Parameters if prompted, and then select Finish. Use the shift key to select multiple consecutive items or the control key to select multiple nonconsecutive items.
View Reports

The report will open in the Cognos window.

When you are finished viewing the report, you can select the Home icon on the top right side to return to the home page or the Back Arrow to return to the previous page.
Export Reports

You have other options once you run your reports. You can choose to Export the report into various formats.

Select the drop down arrow next to the Report Output icon. You will then be able to open as an HTML, PDF, XML or Excel document.
Save or Send Reports

You can also Email the report or Save as Report View quickly from the toolbar.
Actions

You have other options available to you when running your reports. Under the Actions category, you can select the Run with Options icon (the arrow button).

You can choose different Formats and Languages for your reports. You can also choose to View, Print or Email the reports. Finally, you can prompt for Values if any are available. Once the selections are made, select Run.
Creating a Report View of a report in Public Folder and then loading to My Folder will enable you to use the following features:

- Scheduling
- Saving
- Running in the Background (for reports that take a long time)

These features are available because you have edit access in My Folder, but only query access in Public Folders.

The Report View is linked to the report in the Public Folder the Report View was created from. If the report in Public Folder is updated with a newer version, the update will be reflected in your Report View.

Access to the Report View is the Create Report View icon to the right of the report name.

Under Location, choose Select My Folders, then Finish.

The Report View will now be listed under your My Folder.
Scheduling

You can do much more in My Folder. You can schedule reports. There is a Scheduling icon to the right of the report name in My Folder.

Select Frequency, Start Date and Time, End Date and Time.

Set Options for Report Outputs.

If you select Override the default values, more options will appear.

PDF has the ability to password protect the document using Set...
Scheduling

Set the Prompt Values.

Once you select **Override the default values**, then **Set**, the prompts will appear.

Choose the parameters then select **Finish**.

Set the Delivery Options.

**Option 1 – Save the report.** *(See directions later in the document on how to see a saved report.)*
Option 2 – Email the report.
Select Send a link to the report by email.

Select the link Edit the options.
Choose the recipients. *Do not email the report to anybody who does not have authorization to view it.*
Select Include a link to the report or Attach the report
Select OK
Save Reports

In My Reports, you can select the Run with Options icon to the right of the report name to save the report.

From this screen, you will:

Select the Format (HTML, Excel, CSV, PDF).
Select the radio button Save the report.
Select Run.
If prompted, select Parameters and then Finish.
View Saved Reports

Once the report has been generated, you will see the Output Version icon to the right of the report name.

Select the icon, then select the report you would like to view.
Modify Report Properties

Access Set Properties through the icon to the right of the name of the report.

On the General tab, under Report output versions:
Set the number of occurrences to save more than one output (The default is 1).

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.
Run in Background Mode

Run My Folder Reports in Background Mode
- (Recommended for long running reports)

In My Folder, Select the Run With Options icon to the right of the report name.

From the top right of the screen, select advanced options.
Run in Background Mode

Select Run in the background and Time.

Under Options select Format
  (PDF has the ability to password protect the document using Set).

Select Delivery (save the report or send to email).
  Be careful not to email the report you have been authorized to view to somebody who does not have authorization.

Select Run.
My Activities and Schedules

Select the **My Area** icon (the icon that looks like a person), then click on **My Activities and Schedules**.

In the upper left corner, you now have options to view your current, past, and upcoming activities. You also have an option to view and edit your schedules of tasks.

If you have any reports scheduled, you can modify the schedule by selecting the drop-down arrow next to the name of the report.
Setting Preferences
Select the **My Area** icon again then **My Preferences**.

If you explore the **General** tab, there are preferences that you can adjust to fit your needs.
Resources

Contact Information

For more information, questions or concerns contact:
cognos-administrators@rowan.edu

To request new reports, complete this form:
https://confluence.rowan.edu/x/XnSpAw

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