# Reporting User Guide Cognos Analytics 11.1.7



# (Version 1.0)

# **Document Control Information**

### **Document Information**

Document Identification	USC - Reporting User Guide Cognos 11.1.7
Document Name	USC - Reporting User Guide Cognos 11.1.7
Project Name	Cognos 11.1.7
Document Author	Valerie Jung
Document Version	V1.0
Document Status	Complete
Date Released	12/18/2021

### **Document Edit History**

Version	Date	Additions/Modifications	Prepared/Revised by
V1.0	06/20/2020	Initial draft	Valerie Jung
V2.0	12/18/2021	Final	Arrin Renchie-
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## **Document Review/Approval History**

Date	Name	Organization/Title	Comments

### **Distribution of Final Document**

The following people are designated recipients of the final version of this document:

Name	Organization/Title



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# **Section 1: Conversion to Cognos Analytics Timeframe**

The following information highlights key dates and important information to be ware of regarding Cognos 11:

- When will user start using Cognos 11?
  - Cutover to version 11.1.7 will take place on 01/22/2020
- What does this mean for you?
  - Shortcuts/bookmarks to Cognos need to be updated to: https://eda-cogappprd1.usc.edu/itseda/.

### You may be used to logging in using these portals/links, for instance:

- KFS GL Ledger
- CAMS Portal
- Business Services
- Pavroll
- Enrolment Services
- Purchasing and Accounts Payable (PurAP)
- TARA (Total Access for Research Administration)
- Direct Access to Cognos

### Key Points to note:

- You no longer have to use Internet Explorer as web browser. Use Firefox or Chrome!!
- Creating reports will only be possible in Google Chrome or Firefox.
- Running reports should be possible in any browser.
- Existing version of Cognos 10.2.0 will no longer be available to Cognos report Users.
- Run existing version of Cognos 10 in // for a couple weeks (but all new content to
- be created in 11).
- Brand new user interface with version 11.1.7.
- ITS governed reports will now be delivered from sender:
  - o "Cognos System" (cognos01@usc.edu) instead of individual user



# Section 2: Cognos Analytics Overview

### Single, simplified, unified portal for all tools:

- Portal uses a series of sliding panels instead of tabs and folders
- User experience is the same on all devices (laptop, desktop)
- More intuitive and interactive
- Fresh new icons on all objects
- Recently Run Reports are easily accessible

### New Smart Search:

- Fully indexed resulting in quicker results
- Similar to Google search, returns results as you type
- No wildcards are needed
- Searches can be **saved** for future use
- Search results can be filtered by content type (reports, dashboards, folders etc.) and by date

### My Content (used to be My folder):

- Favorite reports, Private content and links
- Team content (used to be Public)
- Access catalog of objects associated to your role.
- Personalization Opportunities
- Set home page
- On- Screen Hints/Coach Marks
- Schedules



# Section 3: New Sign Screen and Portal

• New sign on screen

W	elcome to USC Reporting System	
	Log in with your USC LDAPID.	
	Passeure)	
	(many) of Samera Laborat 22 (22).	

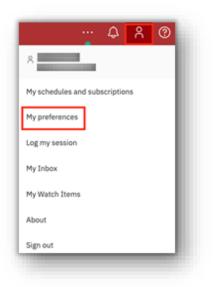
• New portal landing page and navigation panel

TLNC USC Cognos Analytics			Welcome 🗸	
Hone     Search     My content     Tram content     Recent	Hello. Welcome to Cognos Analytics. Unearth hidden insights with a pr experience driven by AL			
+ Nex •	How-to videos How-to videos we capto Andytica and tant gaining insights into your data.	Samples Samples Get inspired by our samplest fiee what you can build with Cognos Analytics.	Accelerator catalog Accelerator catalog Browse a graving catalog of assets to enhance your experience. Presses see the Accelerator Catalog FAQ for sup.	



### **IMPORTANT NOTE:**

- You will have to follow below two steps **ONLY** the first time the user login to Cognos 11 to renew your credentials. Upon logging in for the first time, perform below two steps:
- 1. Click on the "Personal Menu" icon, followed by "My Preferences"



2. Click on the "**Persona**l" tab, followed by "**Advanced**" and click on "**Renew**" to renew your credentials

My preferences General Personal	
mail	
shibanir@usc.edu	
Advanced	^
Credentials	Renew
My credentials	Manage >
Groups and roles	View details >
My capabilities	View details >
Logging	Manage >
AI learning	Manage >

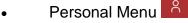
# Section 4: Navigating Cognos Analytics User Interface (UI)

The new UI and navigation panel provides users with a streamlined way to view content and activities pertinent to them. On the top right corner, we have four buttons to set personal preferences:

Welcome 🗸		¢	R	?
				-

# • Learn 😨

On the top right corner, we have the Learn button which contains IBM Knowledge Centre and articles to keep up to date on the latest updates from IBM on Cognos Analytics as well as how-to-videos and articles. Knowledge Centre will lead you to <u>IBM Cognos</u> <u>Analytics Version 11 documentation</u>



The personal menu is where you can set your personal preferences, for example if you want to change the default report format for all reports from HTML to Excel

Ĵ Notifications

You will find any notifications here

### • More ····

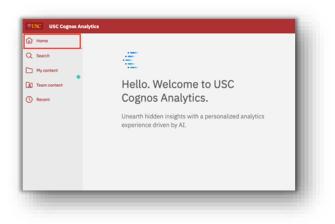
The more icon has the "Set as Home" option. This feature allows you to change the default home page to a personalized report or KPI Dashboard of the user's choice. For example, if user would prefer to see a report/dashboard on login instead of the home page, the user can open the report and navigate to More and click on Set as Home. After logging out and logging back in, the new report or dashboard will be the User's home page.

# 4.1 Navigation panel

- On the left side of the UI is the main **Navigation Panel**
- This navigation panel is present on the UI at all times and updates dynamically as the user works with the various capabilities within Cognos Analytics.

# 4.2 Home

• At any point if you want to return to the home screen from a different window, for example after running or creating a report you can click on the home button to return to the Welcome screen.



# 4.3 Search

- The New Smart **Search** in Cognos Analytics provides a modernized search engine that uses a smart, intent-driven search algorithm to assist the User. **Click** on **Search** to open the search panel.
- As you type, an auto-fill feature will launch and render search suggestions for related terms. Click on the "**x**" to delete text or change your search criteria.
- Click outside the Search panel to close it. Searches can be saved or filtered.

SUSC USC Cognos Analytics			
Home	Search	8 7	
Q Search	Q SPA	×	
My content	50 Results		
Team content	SPA     Team content		
() Recent	SPA     Team content > Ad Hoc Reports (For Users)		

# **4.4 My Content (used to be My Folders)**

The My Content folder is where you will store your reports or create links. This is • your personal folder

Home	🗅 My	content	+ 🖓	11	
Q Search		Cognos Demo 4/24/2020 2:35 PM			
My content	. 0	Copy of Research Activity 3/4/2020 11:29 AM	Report		
Team content					o USC
( Recent					

# 4.5 Team Content (used to be Public Folders)

- The Team Content folder contains all standard reports and data downloads that • are available to all users, depending on the level of security and roles associated with the user.
- Click on Team Content to open the navigation panel. Notice the list of folders is similar in structure to the existing Public Folders.
- Click outside the Team Content panel to close it.

<b>*USC</b> USC Cognos Analytics				
Home	D Team content ⇒ + ♀ ↑↓			
Q Search	Ad Hoc Reports (For Users) 10/2/2020 3:55 PM			
My content	AdHoc4 (General Ledger) 4/18/2014 12:24 PM			
Team content	AdHoc6 (General Ledger) 6/30/2020 12:28 PM	JSC		
C Recent	AdHoc6 (ICT) 6/30/2020 12:28 PM			
	Admission Self-Service Reports (For Users) 3/11/2019 4:05 PM	onalized analytics		
	<ul> <li>Admissions 6/30/2020 11:44 AM</li> </ul>			
	C ARRA Reports 6/30/2020 11:45 AM			
	Awards     6/30/2020 12:29 PM			
	Awards_KC 6/30/2020 12:29 PM			
	Bank Reconciliations 8/21/2019 11:39 AM			

# 4.6 Recent

- The Recent button shows the user the most recently used list of content, up to 20 objects (reports, dashboards, data modules, etc.).
- Objects appear in order based on most recently used.
- Once an object is viewed, it will move to the top of the list.
- Hover your mouse over the icon to the left of each object to identify the type of object.
- Click outside the Recent panel to close it.

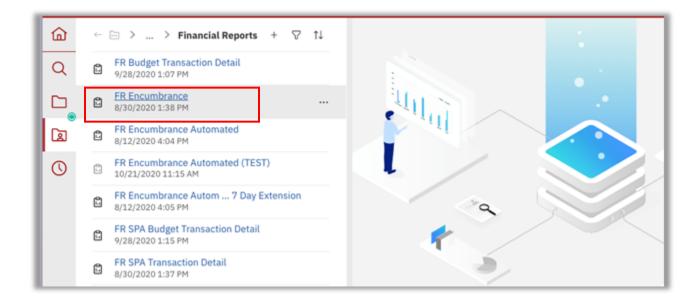
<b>USC Ognos Analytics</b>			
Home	Recently viewed		
Q Search	Physical Inventory and Follow Up Report     Team content > CAMS Reports Inventory Reports		
My content	Physical Inventory and Follow Page Break Team content > CAMS Reports Inventory Reports		
Team content			
C Recent			

# 4.7 Run a Report

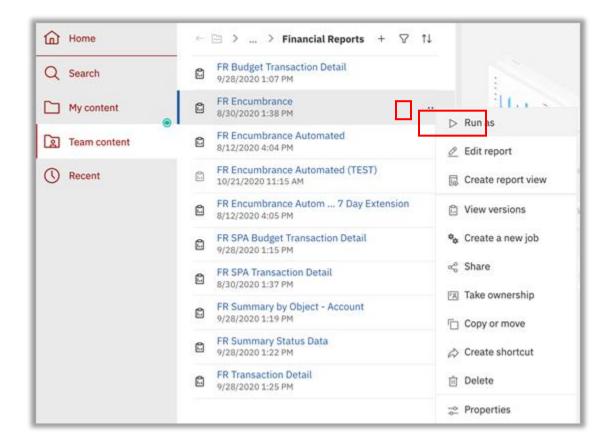
- There are several ways to run a report:
  - Option 1: Through the portal pages. Navigate to the "Red Page" and click on the report title. There are several portal pages depending on your department, a list of portal page links will be provided in a separate document. For example: Business Intelligence Portal for KFS – General Ledger.

	C University of Southern California	Welcome to the Business Intelligence Portal for KFS - General Ledger	1
	Current status of the Cognos Reports is normal.	Please take note of our new status message informational displays. Also note, 81 is now available from 7-88 AM is 11:88 PM workslays.	1988./S
	Financial Reports	FDL Reports	LookUp Reports
Account	t Status Report (ASR)	BA.Extract.Acct.P inclusives page of Mile will project to the follows	Chart of Accounts
ASR wit	th Object Type SubTotals	BA.Extract.Chart.P recourse another	Object Code Inquiry
ASR for	r Download	BA.Extract.Detail.P Part 1 ns. and or bage results and an	Organization Inquiry
ASR wit	th Object Type SubTotals for Download	BA.Extract.Detail.P Part 2 sources results and an	Check/Electronic Payment Number Look-Up Report
Analysis	ь R	BA.Extract.PD.P vol.homory.pgs within to university which with	GV Look-Up Report
Account	t Totals by Object Class	BA.Extract.Sum.P rectament and within them in the	
Ledger	Transaction Inquiry	BA.Program.Access.P Re.Access of access to trying in out	
Transac	ction Detail Report	BA.Rollup.P.m.kma memory	
Financia	al RollUp Report	Financial Report - Budget Transaction Detail	
Financia	al RollUp Report 2	Financial Report - Summary Data Status	
Internal	Billing Requisition Internal Encumbrance Report	Financial Report - Summary by Object - Account	
		Financial Report - Transaction Detail	

• **Option 2:** Navigate to the report through "**Team Content**" or find the report in your recently run reports and simply click on the report name



 To change the default output of the report, click on the More icon or three dots next to the report name followed by "Run As":



 Choose the output format and click on "Run" on the bottom right corner of the screen

Run in background		Summary	
Prompt me			
You will be prompted for input before the report n	uns.	Format	
		HTML	
Q, Find		Languages	
		English (United States)	
Format		Reset defaults	
HTML O PDF	C Excel		
O Excel Data O CSV	○ XML		
Accessibility			
Enable accessibility support	^		



# 4.8 Export a Report

• Once a report has run, if you want to export to Excel, PDF or CSV format click on the "**Run as**" icon on the top left corner of the screen and choose output format

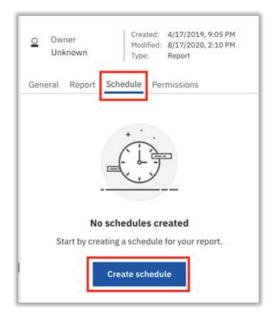


# 4.9 Schedule a Report

• To schedule a report, navigate to the report and click on the "More" icon or three dots and then click on "Properties"

Home	← 🖻 〉 〉 *Chart of Acco Report + 🌚 🏌	L
Q Search	Chart of Accounts Report 11/4/2020 9:45 AM	> Run as
My content		Edit report
Team content		Create report view
C Recent		View versions
		≪g Share
		📧 Take ownership
		🔁 Сору
		😒 Properties

• Click on the "Schedule" tab and then the "Create schedule" button



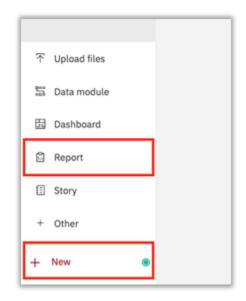
- Choose delivery frequency, example Daily, Weekly and Repeat on which day of the week / date of the month options from the "**Schedule**" tab.
- Click on the "**Options**" tab to choose delivery format and the "**Prompts**" tab to set default prompts for delivery and then click "**Save**"

Schedule Option	s Prompts	Summary
Frequency		Schedule Run every 1 weeklj) from December 2, 2020 at 10:40 AM on Wednesday.
Type	Weekly ~	Credentials
Repeat every	1 🖒 week	Shibani Rai shibanin@usc.edu
Depart on		Priority
Repeat on	M T W T F S S	3 Format
Daily time interval	0	Excel
	~	Delivery
Period		Save
Period		Languages English (United States)
Start	🗇 2020-12-02 🕓 10:40 AM	<ul> <li>Reset default options</li> </ul>
No end date	^	+) Reserversaria
Advanced	·	
	Ý	
		Save Cancel



# 4.10 Create a new report:

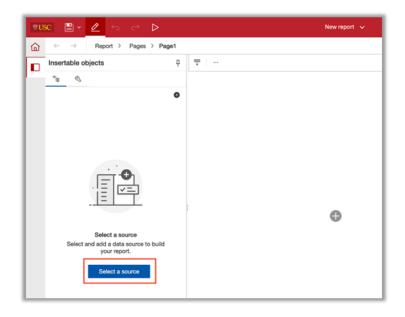
• Select "+ New" on the bottom left corner of the screen and then click on "Report".



• Click on "Blank" template and click "OK".

Templates and themes	1
Templates Themes	
$\nabla$ ~	
Blank Blank active report	This page uses flow layout. Objects will be arranged top-to- bottom as in a word processing document. Drop objects here to add them to this page.
	OK Cancel

• Click on the "Select a Source" button after the following screen will appears.



- Navigate to the package of choice when the pop up appears. For this example, we will use the package "Adhoc6 General".
- Click "Open".

Open	file	×
	Team content > AdHoc6 (General Ledger)	
ß	There's nothing in this folder.	
	Open Cancel	

• The following screen will appear. Expand each field to see cascading detail.

₿U	80 🖹 × 🖉 🕤 🔿 ▷		New report * 🗸 🗸
奋	$\leftarrow$ $\rightarrow$ Report > Pages > Page	je1	
	Insertable objects	中 🚥	
E	°14 N		
	Q Find		
	<ul> <li>Construction</li> <li>Const</li></ul>		
			•

• Drag and drop the columns that you want to see in the report to the blank canvas on the right.

®USC 🗒 v 🖉 🕤 ⇔ ▷	New report * 🗸
☆ ← → Report > Pages > Pa	ge1
Insertable objects	平 ※ 哈 台 ♡ · 思· グ · T 田 ▲ · 《·
°s 10 4	Cocount Number Account Name Sub Fund Grp Code
Q Find	<account number=""> <account name=""> <sub code="" fund="" grp=""></sub></account></account>
	<account number=""> <account name=""> <sub code="" fund="" grp=""></sub></account></account>
✓ I AdHoc6 (General Ledger) ✓ I Generic Fields	Account Number> <account name=""> <sub code="" fund="" grp=""></sub></account>
✓ El Generic Pielos	
# Data Source	
** Account Number	
** Account Name	
# Sub Fund Grp Code	
it Fiscal Officer	
##: Acct Supervisor	
iii Acct Manager	
#t: Fiscal Officer ID	

• Click on the Filter icon followed by "Edit Filters" to filter the report.

Insertable objects	꾸	T % D 0	V~ E~	Ø - T ⊞
°s 🔟 🖏		** Account Number	/ Edit Filter	s und Grp Code
Q Find		<account number=""></account>	<li>Insert Filt</li>	er Text und Grp Code:
		<account number=""></account>	<account name=""></account>	<sub code:<="" fund="" grp="" td=""></sub>
✓ Start AdHoc6 (General Ledger) ✓ D Generic Fields		<account number=""></account>	<account name=""></account>	<sub code:<="" fund="" grp="" td=""></sub>
✓ ⊞ Account				
# Data Source				
abc Account Number				
abc Account Name				
abc Sub Fund Grp Code				

• Click on "Add" to select which column to filter on.

Detail Filters Summary Filters	
	Usago
	<ul> <li>Required</li> </ul>
	O Optional
	<ul> <li>Disabled</li> </ul>
	Application
	<ul> <li>Before auto aggregation</li> </ul>
	<ul> <li>After auto aggregation</li> </ul>
	Can be changed in the viewe
• = 2	

• Select the column you wish the filter on. For this example, we will choose "Account Number" and click on "OK".

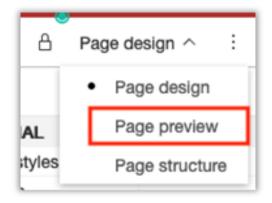
Create filter	×
Custom based on data item     Account Number	~
<ul> <li>Combined</li> <li>Advanced</li> </ul>	
ок с	ancel

- You can either Search or manually select the accounts you want to see in the report. You can also enter Conditions, for example "Keep these values" Exclude these values".
- Click on "**OK**" once you've entered your search criteria.

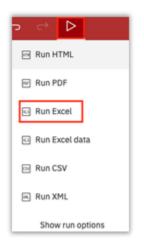
ter condition - Account Number	er	×
Individua	Condition	2
ailable items	Selected items	
Q. Search	<ul> <li>Manually input items</li> </ul>	
Select all	Keep these values	~
0000000000	100000083	
100000083	1001041050	
1001041050	1001041200	$\odot$
1001041200		
1001041205		
1001041300		
$\pi \uparrow \downarrow$	×	Remove all
Advanced settings		



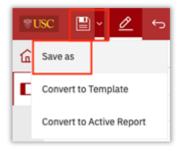
• To preview report data, navigate to the top right corner of the page and from the "**Page Design**" drop down choose "**Page Preview**". To go back to page design mode click on "**Page Design**".



• To Run or export a report click on the "**Run As**" icon on the top right corner of the screen.



• To save the report click on the "Save" icon on the top right corner of the screen followed by "Save As".





• Make sure to switch to the "My Content" tab, enter a report name and click on "Save".

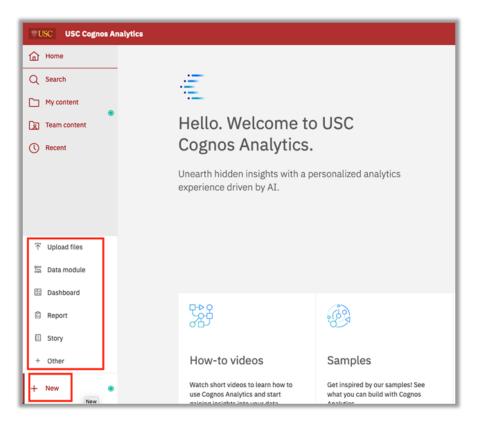
	D My content	C7
<sup>My</sup>	ASR-Summary of Account Status - SPA Test SR	
	ASR-Summary of Account Status - SR July 27	
	ASR-Summary of Account Status SR Sep 2020	
	පී Cognos Demo	
Destina	tion: My content	
Save as	New report	



# **Section 5: Other Features - New**

The **New** button allows the user to create a new report, dashboard or data module.

These features may not part of day 1 launch and we will set up trainings for this at a later time.



### **Upload files**

The Upload files button allows users to upload Excel files for quick analysis and visualizations.

Excel XLS, XLSX and CSV files may be uploaded.

Note: Only the first tab of a multi-tabbed spreadsheet will upload. Save each tab as a separate file if you want to upload multiple tabs of data. Size limit is 100MB.

### **Creating a Dashboard**

The **New** button allows the user to create dashboards or data module.

#### **Other Training resources**

Click the IBM Cognos Analytics icon. Help takes the user to the IBM Cognos Analytics Community

http://www.ibm.com/communities/analytics/cognos-analytics/