

Reporting User Guide

Cognos Analytics 11.1.7



USC University of
Southern California

(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-Thomas

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 aware 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-cogapp-prd1.usc.edu/itseda/>.

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

- [KFS GL Ledger](#)
- [CAMS Portal](#)
- [Business Services](#)
- [Payroll](#)
- [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:
 - **“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):

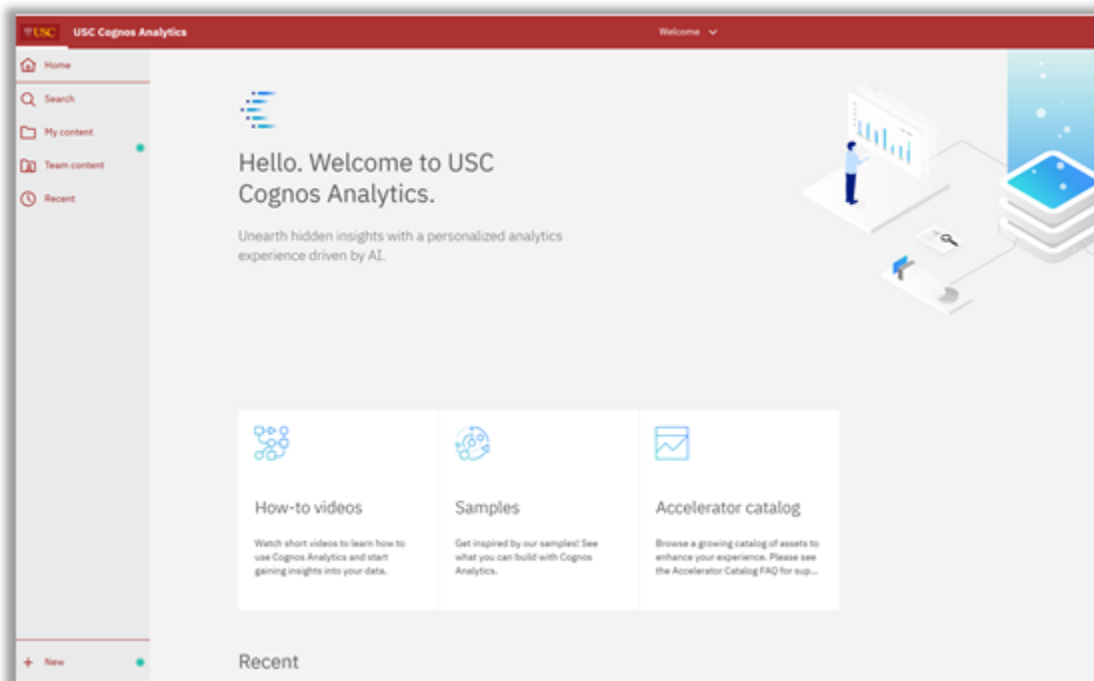
- Favorite reports, Private content and links
- Team content (used to be Public)
- Access catalog of objects associated to your role.
- Personalization Opportunities
- Set home page
- On- Screen Hints/Coach Marks
- Schedules

Section 3: New Sign Screen and Portal

- New sign on screen



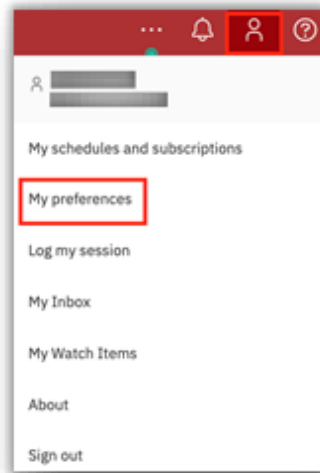
- New portal landing page and navigation panel



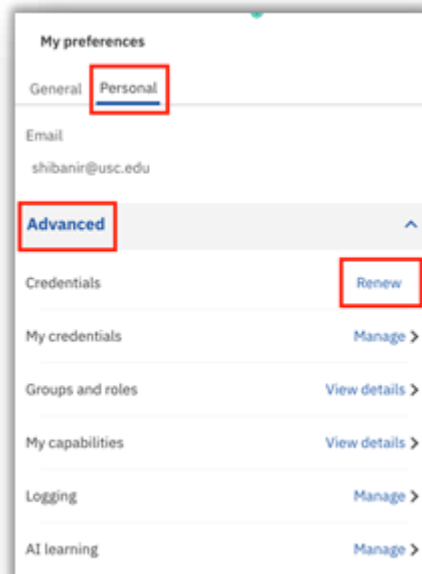
IMPORTANT NOTE:

- 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 “**Personal**” tab, followed by “**Advanced**” and click on “**Renew**” to renew your credentials



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:



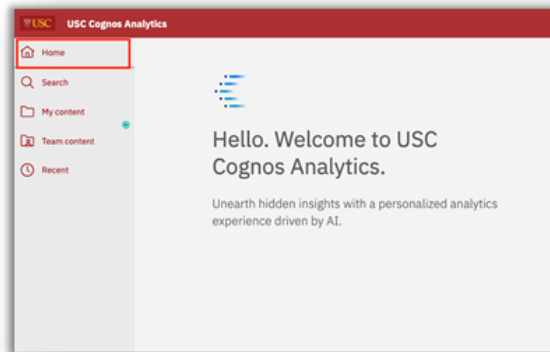
- Learn 
On the top right corner, we have the Learn button which contains IBM Knowledge Centre and articles to keep up to date on the latest updates from IBM on Cognos Analytics as well as how-to-videos and articles. Knowledge Centre will lead you to [IBM Cognos Analytics Version 11 documentation](#)
- Personal Menu 
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
- 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.

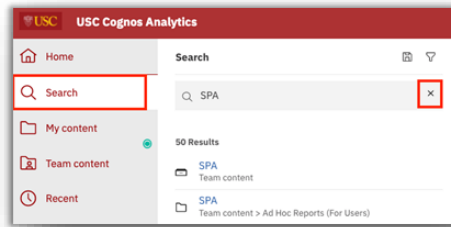
4.2 Home

- 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.



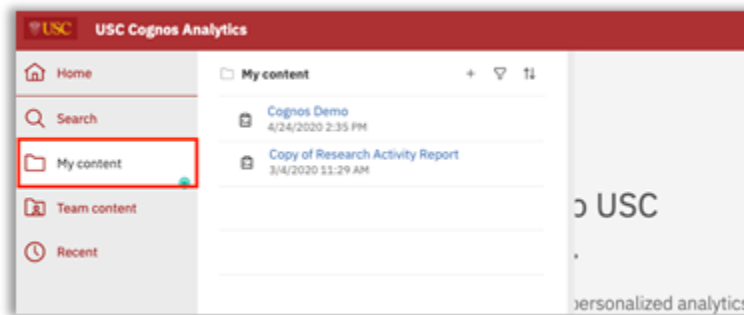
4.3 Search

- 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.



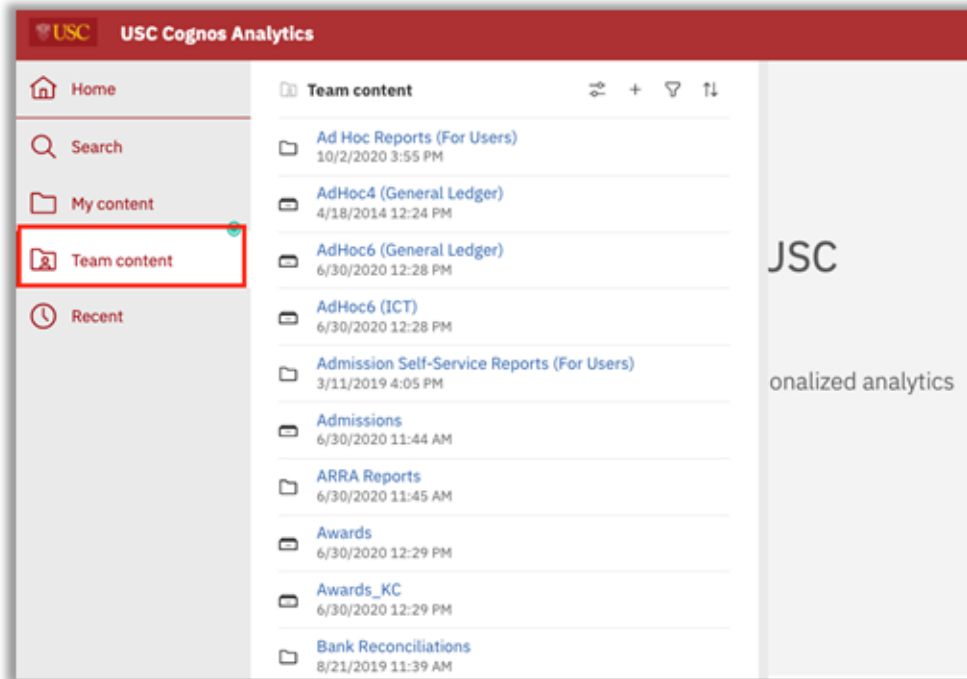
4.4 My Content (used to be My Folders)

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



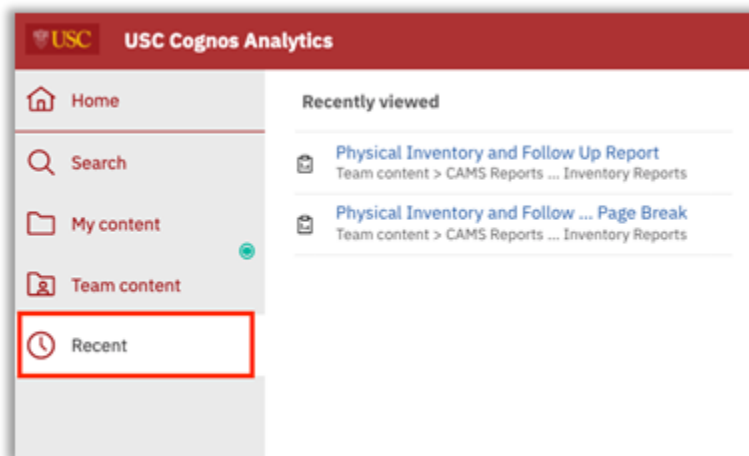
4.5 Team Content (used to be Public Folders)

- 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.



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.

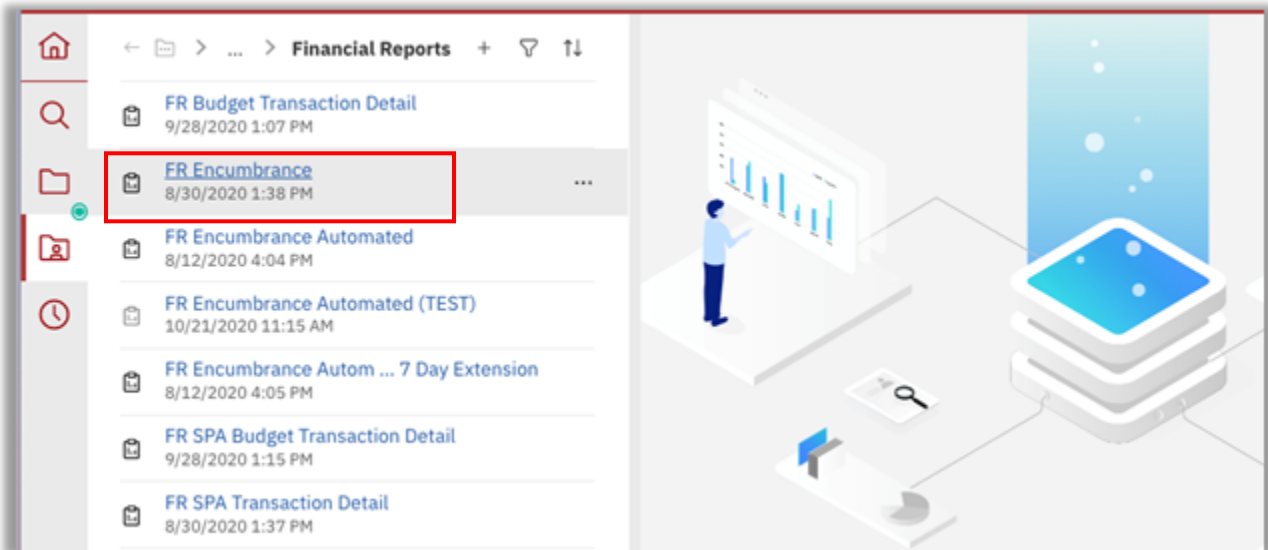


4.7 Run a Report

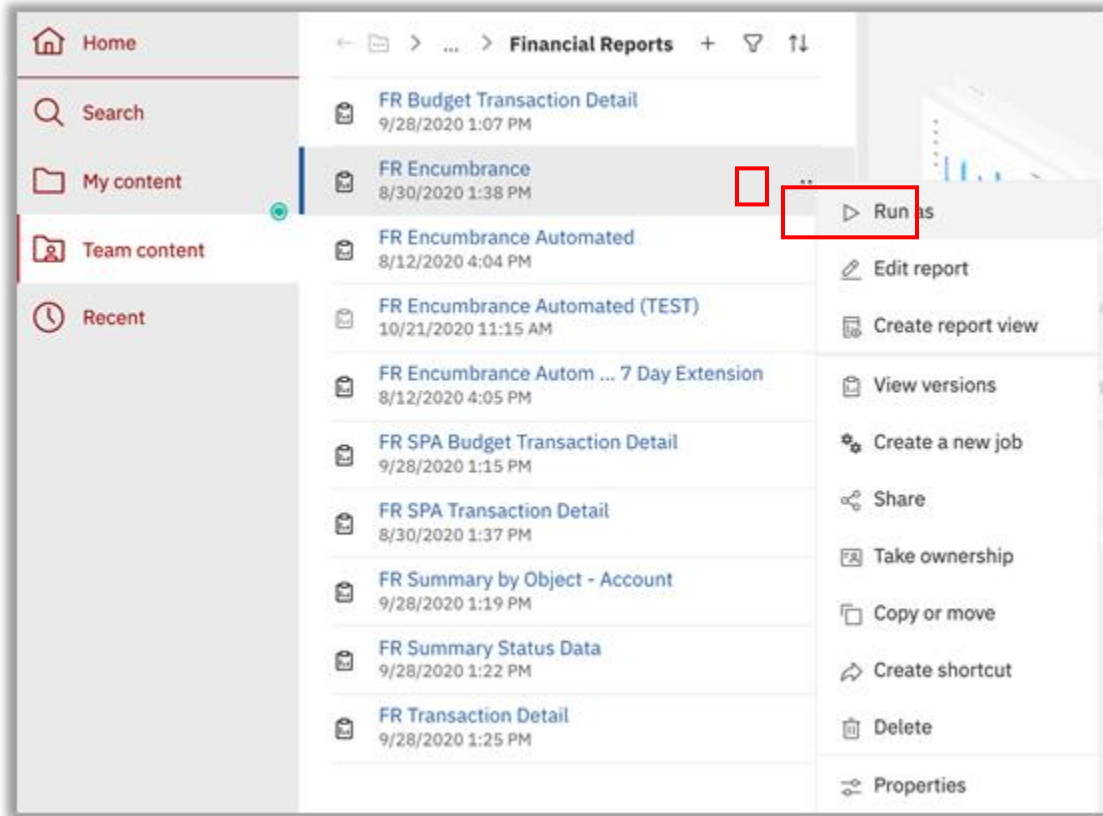
- There are several ways to run a report:
 - **Option 1:** Through the portal pages. Navigate to the “Red Page” and click on the report title. There are several portal pages depending on your department, a list of portal page links will be provided in a separate document. For example: Business Intelligence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



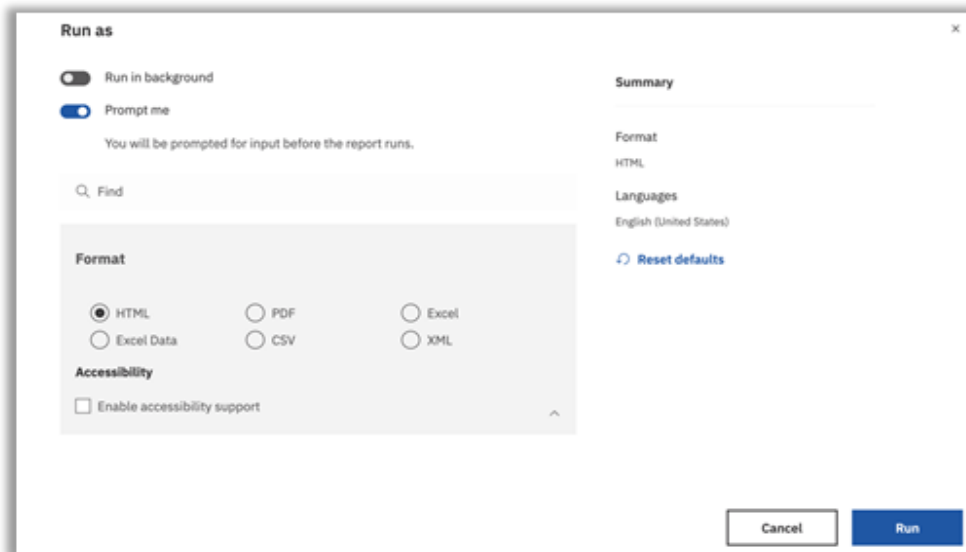
- **Option 2:** Navigate to the report through “Team Content” or find the report in your recently run reports and simply click on the report name



- 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”**:

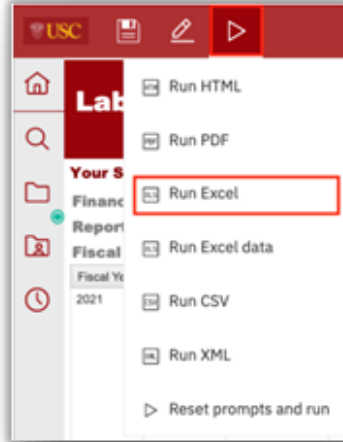


- Choose the output format and click on **“Run”** on the bottom right corner of the screen



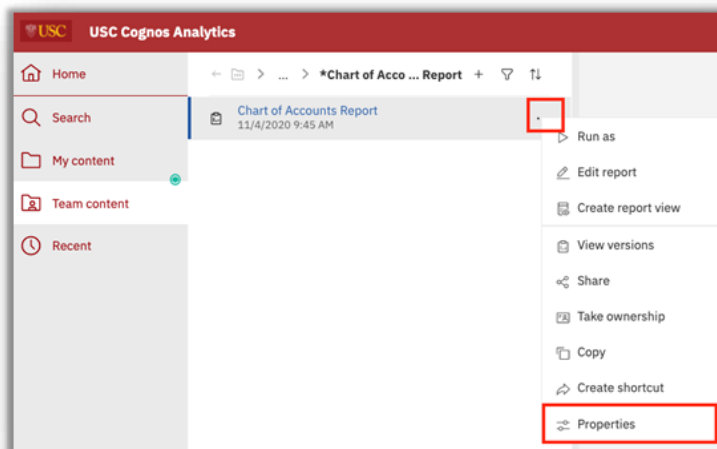
4.8 Export a Report

- 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

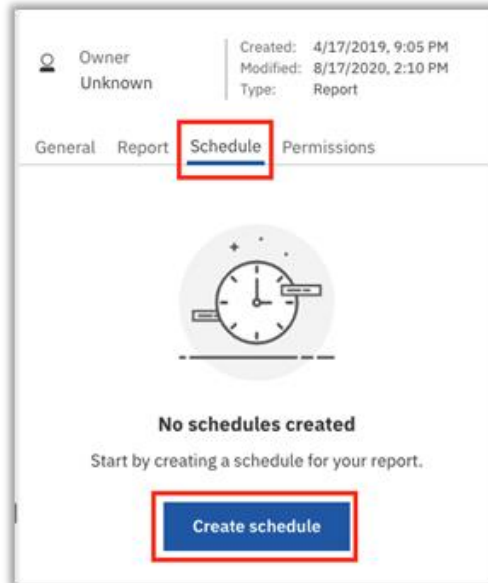


4.9 Schedule a Report

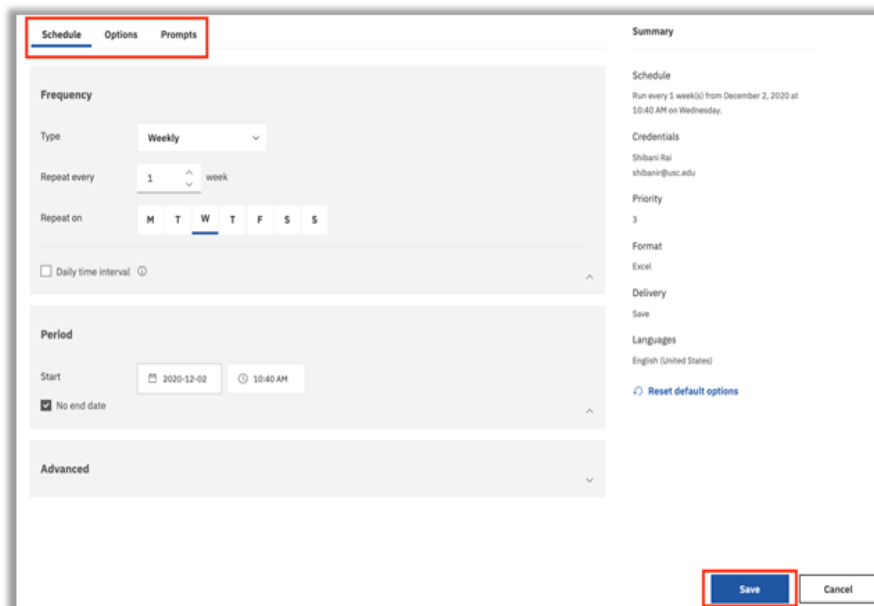
- To schedule a report, navigate to the report and click on the “**More**” icon or **three dots** and then click on “**Properties**”



- Click on the **“Schedule”** tab and then the **“Create schedule”** button

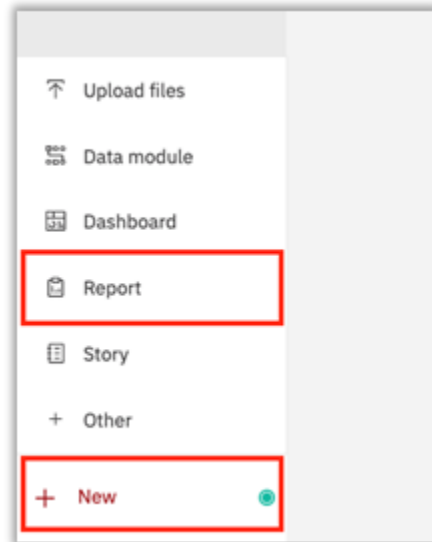


- Choose delivery frequency, example Daily, Weekly and Repeat on which day of the week / date of the month options from the **“Schedule”** tab.
- Click on the **“Options”** tab to choose delivery format and the **“Prompts”** tab to set default prompts for delivery and then click **“Save”**

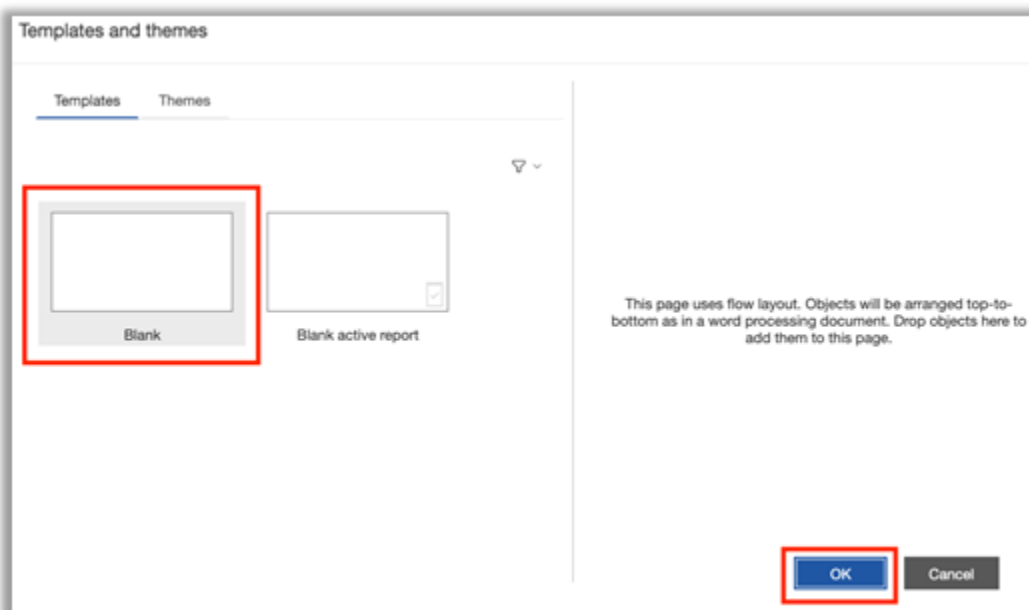


4.10 Create a new report:

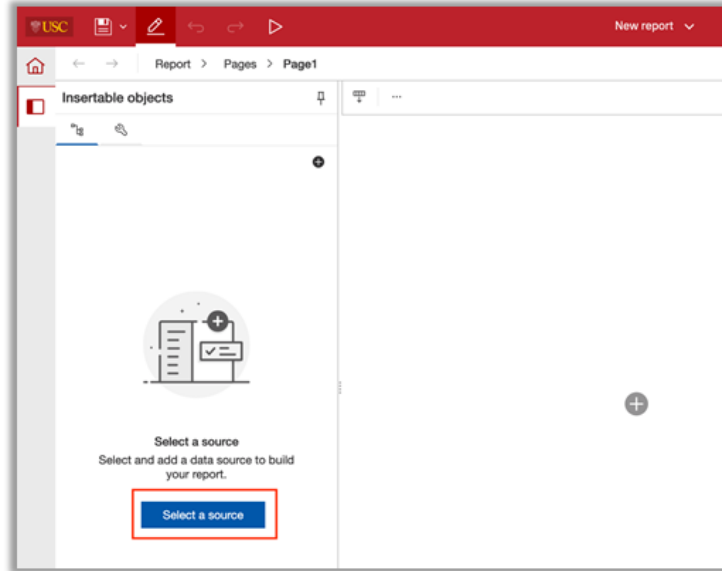
- Select “+ New” on the bottom left corner of the screen and then click on “Report”.



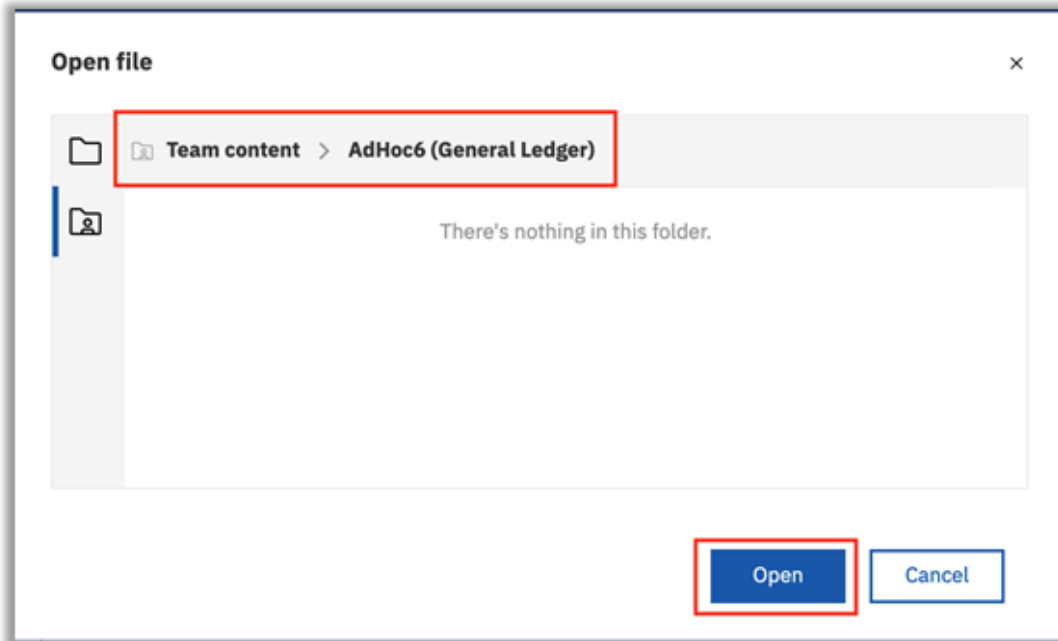
- Click on “Blank” template and click “OK”.



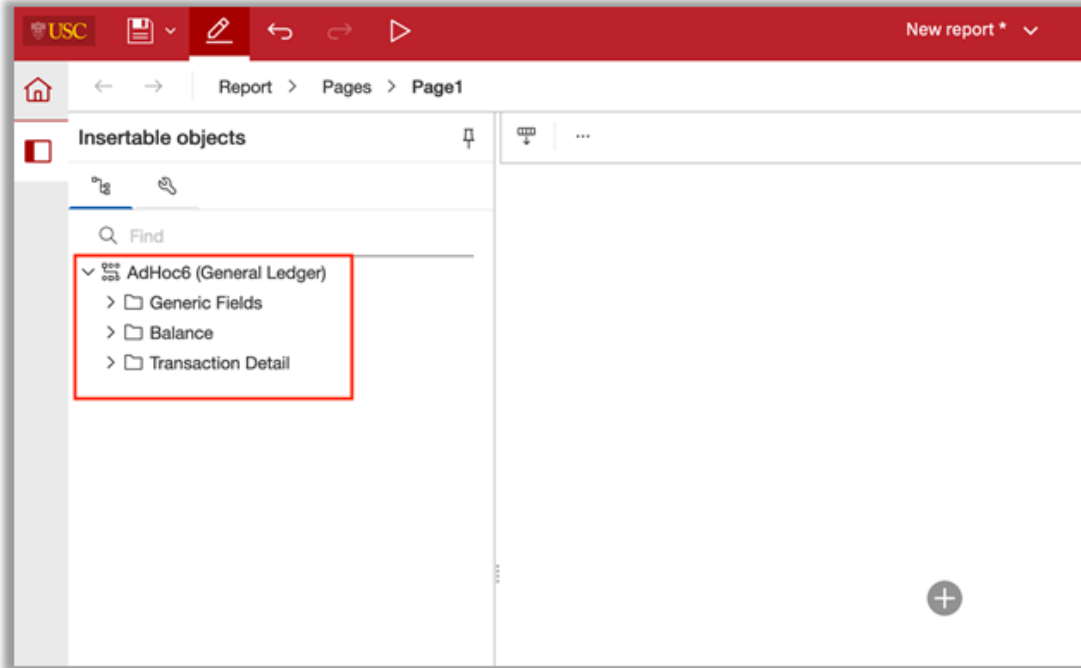
- Click on the “**Select a Source**” button after the following screen will appears.



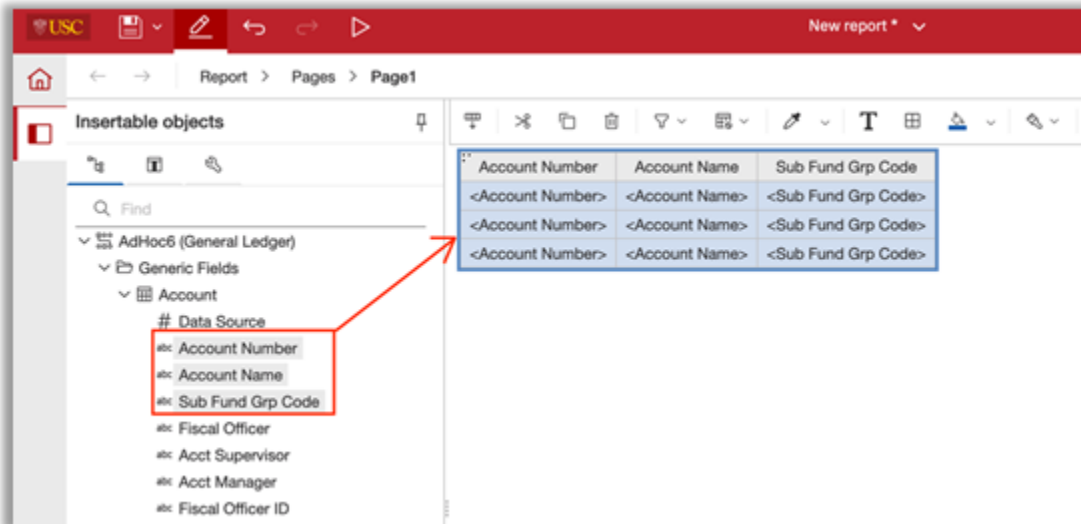
- Navigate to the package of choice when the pop up appears. For this example, we will use the package “**Adhoc6 General**”.
- Click “**Open**”.



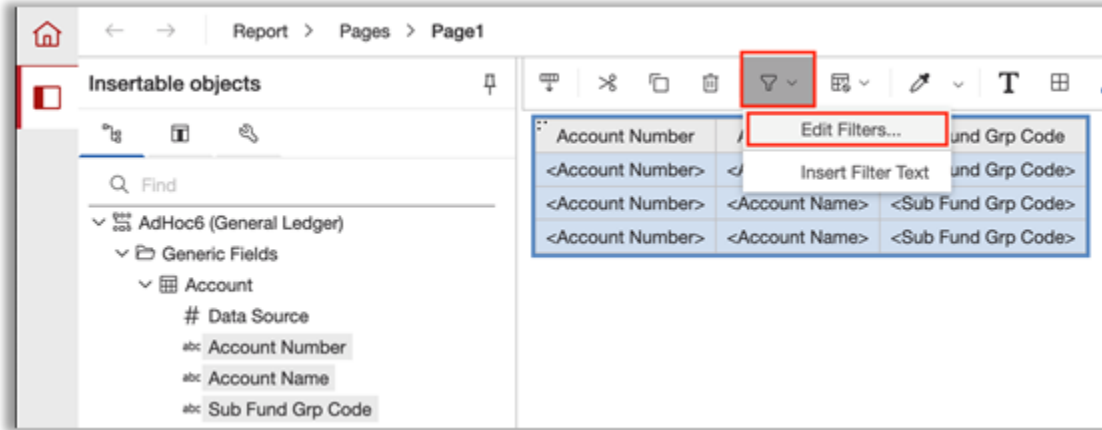
- The following screen will appear. Expand each field to see cascading detail.



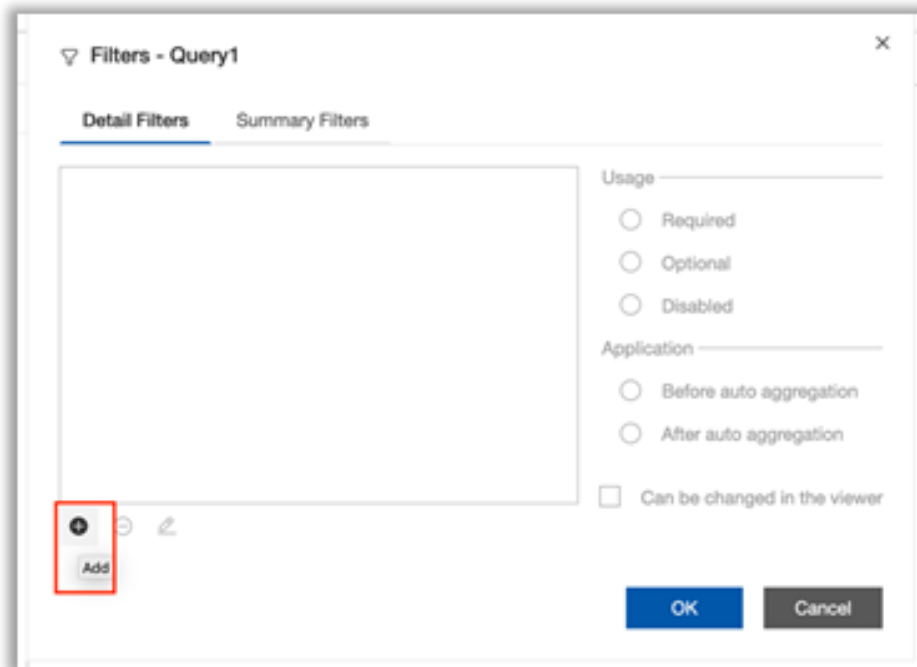
- Drag and drop the columns that you want to see in the report to the blank canvas on the right.



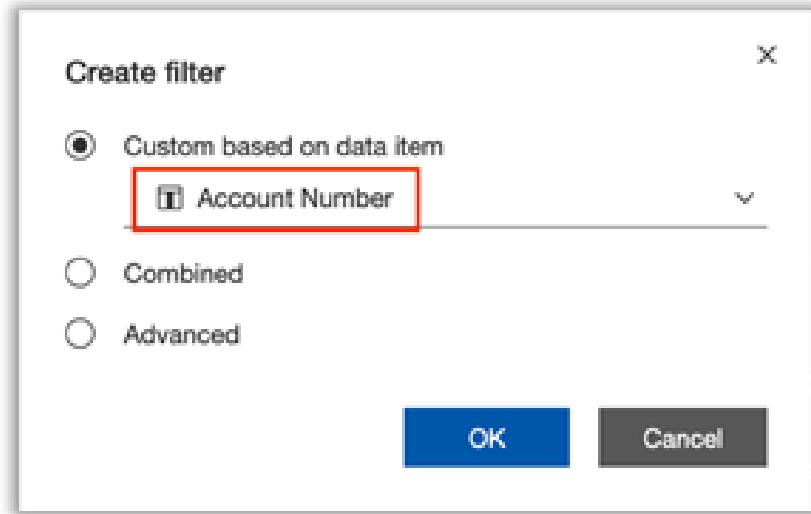
- Click on the Filter icon followed by **“Edit Filters”** to filter the report.



- Click on **“Add”** to select which column to filter on.



- 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

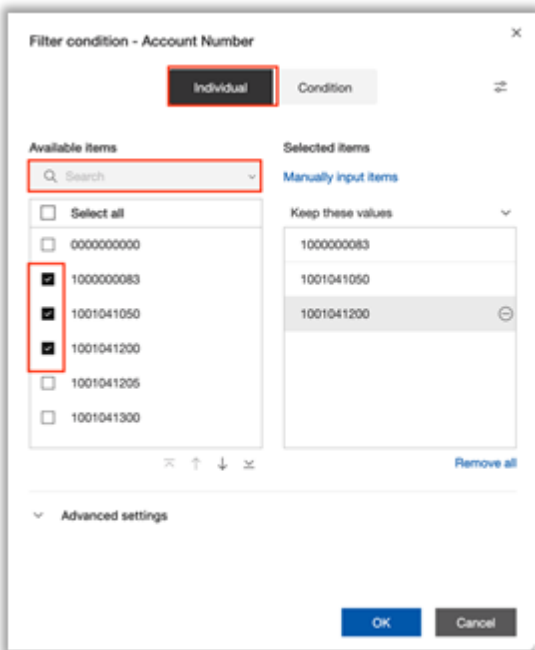
Combined

Advanced

Account Number

OK Cancel

- 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.



Filter condition - Account Number

Individual Condition

Available Items

Selected items

Manually input items

Keep these values

1000000083

1001041050

1001041200

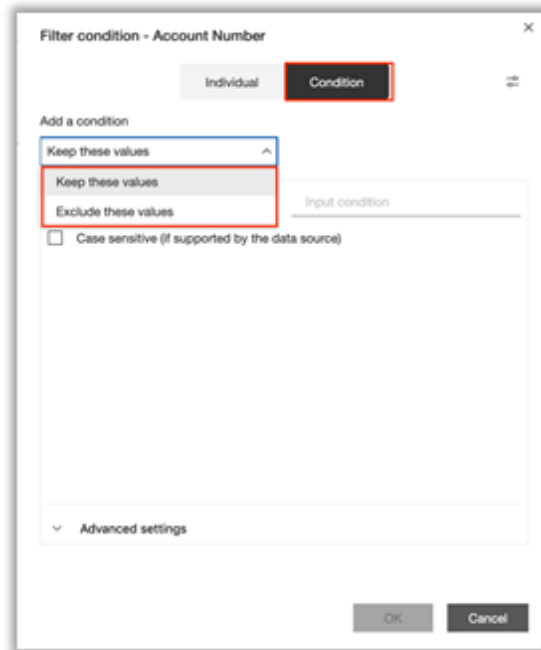
1001041205

1001041300

Remove all

Advanced settings

OK Cancel



Filter condition - Account Number

Individual Condition

Add a condition

Keep these values

Exclude these values

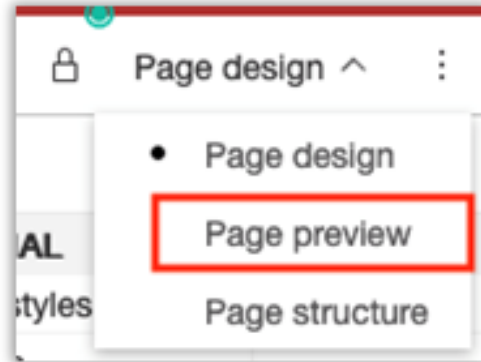
Input condition

Case sensitive (if supported by the data source)

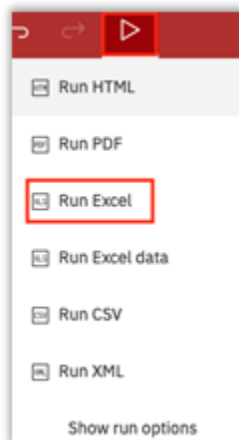
Advanced settings

OK Cancel

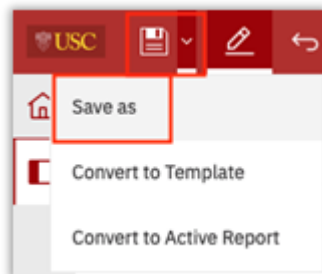
- To preview report data, navigate to the top right corner of the page and from the **“Page Design”** drop down choose **“Page Preview”**. To go back to page design mode click on **“Page Design”**.



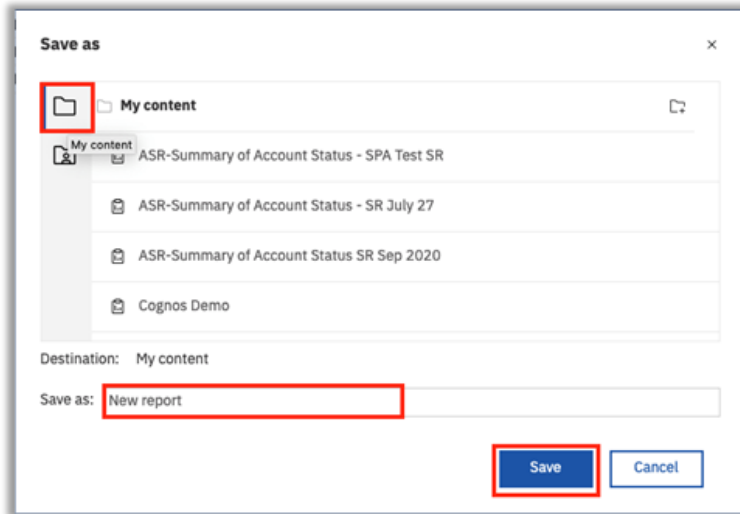
- To Run or export a report click on the **“Run As”** icon on the top right corner of the screen.



- To save the report click on the **“Save”** icon on the top right corner of the screen followed by **“Save As”**.



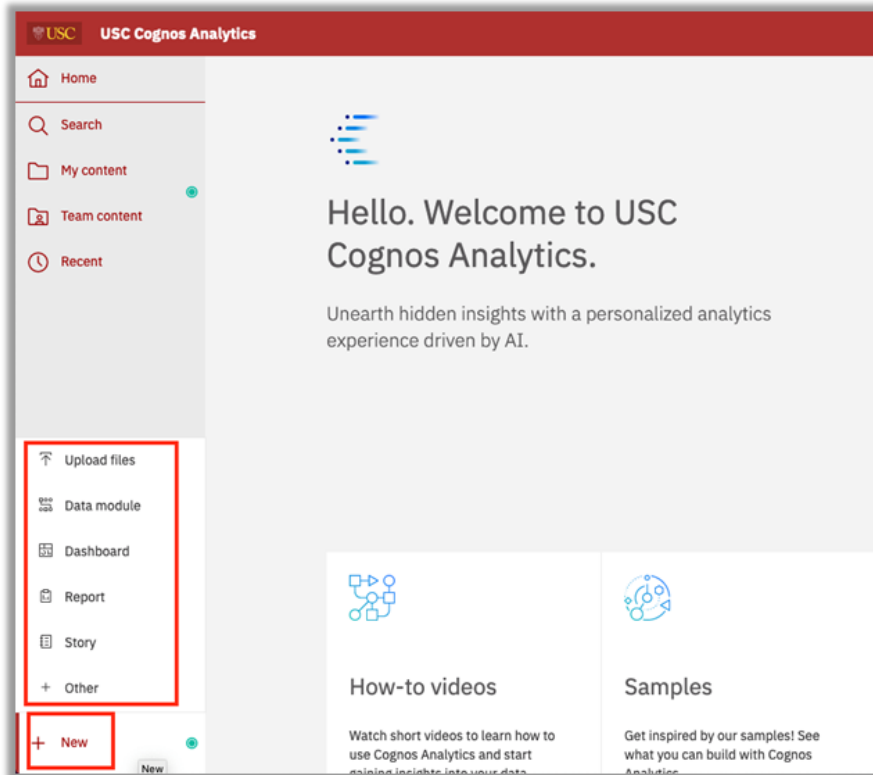
- Make sure to switch to the “**My Content**” tab, enter a report name and click on “**Save**”.



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/>