COGNOS ANALYTICS

For Report Viewers

Center for Data, Analytics and Reporting (CeDAR)
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The goal is for CeDAR to assist report viewers/consumers in their transition from Cognos Connection 10.2 to the current version of Cognos Analytics.

This course introduces the enhancements and improvements in functionality for experienced report consumers and helps navigate the new version. We’ll show how functionality from Cognos Connection remains intact, though some of the methods of performing actions you’ve become accustomed to have been consolidated and/or changed. Nevertheless, we’ll show you how to get started quickly in the all new Cognos Analytics.
Please refer to IBM’s site for recommended browsers and other supported software:

<table>
<thead>
<tr>
<th>Supported Software</th>
<th>Version</th>
<th>Prerequisite Minimum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple Safari</td>
<td>9 and future fix packs</td>
<td>9</td>
</tr>
<tr>
<td>Apple Safari on iOS</td>
<td>10.x and future fix packs</td>
<td>10.x</td>
</tr>
<tr>
<td>Google Chrome</td>
<td>(latest release) and future fix packs</td>
<td>(latest release)</td>
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<tr>
<td>Microsoft Internet Explorer</td>
<td>11 and future fix packs</td>
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<tr>
<td>Mozilla Firefox ESR</td>
<td>52 and future fix packs</td>
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</tbody>
</table>
- Reports
- Data
- Prompts
- Schedules
- Content in My Folders
- Report Names
- Folder Directories
- Run Formats
- Security
What's New

- Completely redesigned interface
- My Folders and Public Folders have been renamed
- New and improved search functionality
- Future changes to UX -- Interactive reports (pending permissions)
- Subscriptions
## Cognos Connection, V10.2

<table>
<thead>
<tr>
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<th>Modified</th>
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</tr>
<tr>
<td>Admin Time Collection - Reports</td>
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<tr>
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<td>More...</td>
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<tr>
<td>Audit Reports</td>
<td>December 7, 2016 4:08:40 PM</td>
<td>More...</td>
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<td>May 15, 2015 10:12:00 AM</td>
<td>More...</td>
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<tr>
<td>Coeus</td>
<td>February 8, 2017 2:15:46 PM</td>
<td>More...</td>
</tr>
<tr>
<td>Coeus - Reports</td>
<td>May 15, 2015 10:13:26 AM</td>
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<tr>
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<td>Cognos 8 Training - Reports</td>
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<tr>
<td>Cognos Users Group</td>
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<td>More...</td>
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</table>
REDESIGNED USER INTERFACE
Cognos Analytics, V11
REDESIGNED USER INTERFACE
RENAMED FOLDERS

| Public Folders | My Folders |

OLD

NEW

- My content
- Team content
Ineffective Search Functionality

Very Effective Search Functionality
Core skills learned in previous versions of Cognos should be directly translated to Cognos Analytics.

The ability to consume interactive reports will be introduced in future releases of Cognos Analytics as part of the new UX, making reports available to be enhanced/modified by users.

Note: Not all reports/users will have this option available.
Subscriptions allow users to quickly schedule a personal copy of the report and can be created once a report is run.
NEW USER INTERFACE
https://prime.princeton.edu
The landing page for Financial report users will look very different than the generic landing page for other users. Finance and Treasury will be offering additional reference materials to assist with this transition.
The Report folders you’re used to seeing vertically down the page are now viewed as tabs across the top of the page.

The folder names are exactly the same.

Use the **Team Content** folder on the left navigation menu to view additional report folders you may have access to.
To run a report, click directly on the report name or on an action button to the right of the report to run it directly to the desired output.

<table>
<thead>
<tr>
<th>Summaries</th>
<th>Info</th>
<th>Help</th>
<th>PDF</th>
<th>Excel</th>
<th>Excel Data</th>
<th>CSV</th>
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<table>
<thead>
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<th>Details</th>
<th>Info</th>
<th>Help</th>
<th>PDF</th>
<th>Excel</th>
<th>Excel Data</th>
<th>CSV</th>
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<tr>
<td>DC Transaction Detail</td>
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<table>
<thead>
<tr>
<th>Fund Restrictions</th>
<th>Info</th>
<th>Help</th>
<th>PDF</th>
<th>Excel</th>
<th>Excel Data</th>
<th>CSV</th>
</tr>
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<tbody>
<tr>
<td>FIN019 - Fund Restriction/Designation by Assigned Chartstring Balance</td>
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<td>![PDF]</td>
<td>![Excel]</td>
<td>![Excel Data]</td>
<td>![CSV]</td>
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</tbody>
</table>
For those who enter the Information Warehouse via the CeDAR Website or a direct URL, you should continue to follow this process.
You will be brought to a generic landing page where you can easily find and run the reports you need via the left navigation menu or the live tiles in the center of the page.
Navigating the new portal is significantly different from previous versions of Cognos. Let’s take a tour...
Cognos Analytics offers some changes in terminology and content navigation within the content explorer.

My Folders is now referred to as **My Content** and is the personal content area.

Public Folders is now referred to as **Team Content** and is the shared content area.

The menu structure offers easy navigation and additional options to view content within folders. The look and feel is more modern.

**Note**: Be mindful that Cognos remembers where you left off … you may need to use your breadcrumbs to get back!
New and improved in Cognos Analytics is the Search function. The old index update tasks and out-of-date search results are a thing of the past!

- The new search uses a very fast search engine that is always up-to-date.
- It requires no administration.
- Search results appear instantly.
Since the search renders results from all packages and folders, it’s returning content items in multiple forms. You have the ability to filter your search results to narrow things down.
After the results of your search are rendered, you can save your search.

- The save option is only available after you search.

- Once your result is saved, it will appear under an area for saved searches.
The Recent Items area on the left navigation shows recently used content up to the last 20 items.

- Hover over a report/object name to reveal the **More** button.
- Clicking the **More** button exposes a list of new actions.
The Cognos Analytics Welcome Portal is your default Home Page.

- Clicking **Welcome** from the Welcome drop-down will always return you to the generic/default landing page.

- If you prefer, it is possible to make other content your Home page. Click the **More** button on the application toolbar and select **Set as home**.

- Clicking the **Home** button on the left navigation menu will always return you to the custom Home page you elected.

- Use the **Personal Menu** to reset your Home page to the default Welcome Portal/Generic Landing page.
There's much more you can do from the Welcome Portal.

- Recent items appear as 6 (or more) live tiles you can click to instantly access content.
- Click the **Action menu/More** button on the bottom right of the tiles to view additional options for interacting with content.
New in Cognos Analytics is the ability to run your report directly to the desired output without having to first run it to HTML.

Click the **More** button next to the report you wish to run and select **Run as** to view a list of outputs in which your report can be generated.
Cognos Analytics offers the ability to have multiple objects open at the same time and to quickly switch between them using the Welcome Menu/Page Switcher.

- Clicking **Welcome** from the list of open items will always bring you back to the Welcome Screen/Generic Landing page, which may not necessarily be your “Home” page.

- Once ran, reports remain open in this list, making it easy to switch between them. However, it is important to note that clicking back to an open report from the list or from the list of live tiles (while it is still active in the list) will not “re-run” it or allow you to choose new prompts. It will only return you to the report’s last generated output. If you need to re-run your report you will first need to close the active report. This can be done by clicking the ✗ from the list to the right of the report name.
If you wish to simply reset your prompts and re-run the report, click the **Run** button and choose **Reset prompts and run**.
To run a report from the Portal, you have several options:

(A) Navigate to the report from **My Content** or **Team Content** on the left navigation and click directly on the report name.

(B) From this same navigation, click the **More** Button to the right of the report, choose **Run As** and select a method to run the report to a specific output type.
(C) If you’re trying to run a report that you’ve recently worked with, click one of the live tiles.

(D) Click the More button on the bottom-right of the live tile.

Note: Once a report has been opened in a current session, it will remain open in your Welcome Menu/Page Switcher and held in memory until you close it. Clicking on an already-opened report from the live-tiles or Welcome Menu will launch the report with its last generated output.

(E) Navigate to a report via the Recent icon on the left navigation menu.
After you have run a report to HTML you can change the format of the output by selecting the **Run** button on the application toolbar.

This will re-run the report with the prompts you already selected.

Again, to run the report with different prompts, select the **Run** button and then select **Reset prompts and run**.
Create a personal/custom folder directory for your reports in My Content.
To edit the report name and/or description, simply go to the Properties of the report and hover over the title to reveal the “edit” pencil.

To add or edit the report description, simply begin entering text in the Description area.
- Navigate to the report you want to copy and hover over it to reveal the **More** button.

- Select **Copy or move**

- Select/navigate to the destination within **My Content** to which the report should be copied or moved to.
Users can change the default run format for the reports saved in **My Content**.

- Go to the **Properties** of the Report and navigate to the **Report tab**.
- Select the appropriate format.
- This can also be done using **My Preferences** from the Personal Menu.
To change prompt values for a report:

- Go to the **Properties** of the Report and navigate to the **Report tab**.
- In the **Prompt values** section, click **Set values**.
Subscriptions are a new feature available when viewing a report, which allows the user to quickly schedule a personal copy of the report.

Subscriptions cannot be created until a report is run.

Subscriptions are implemented using report views that are stored in a hidden folder called **Subscriptions** in each user’s My Content folder.

By default, each time the schedule runs the report, an entry is created in the user’s **Notifications**.

Notifications of available reports appear on the application toolbar and are denoted by a numerical value.
To manage your schedules and subscriptions:

- Click the **Personal Menu** and select **My schedules and subscriptions**.
As there is still a need to distribute reports to others, the ability to create a traditional schedule is still available.

- Hover over a report to find the More button.
- Scheduling is found in the Properties of the Report.
- From the Schedule Tab, click New.
A report view allows you to have multiple copies of the same report. Each uses the same report specification as the original report, but has different properties such as prompt values, schedules, delivery methods, run options, and output formats.

Creating a report view does not change the original report. You can determine the source report for a report view by viewing its properties.

The report view properties also provide a link to the properties of the source report.

Users can create a report view and then set up a schedule for the report to run at a specified time and frequency.

- Go to the **Properties** of the report and navigate to the **Schedule** tab.
- Click **New**
Traditionally, when you run reports, the data is static. Future releases of Cognos Analytics will offer interactive report outputs where the end user can use context-sensitive menus in report output to manipulate the view.

- Upgraded reports from prior versions of Cognos come in as non-interactive.
- The context menu changes depending on the type of report object and type of data you are viewing.
- Interactive reports give users the ability to: (if applicable)
  - Change the sort order of a data container
  - Set or edit filters
  - Change the aggregation
  - Group a column
  - Save changes
  - Change the visualization
  - Interact with charts
We in CeDAR are here to answer any questions you may have. In addition, we have provided a few links that should prove to be useful.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Link/email</th>
</tr>
</thead>
<tbody>
<tr>
<td>CeDAR Website</td>
<td><a href="https://cedar.princeton.edu">https://cedar.princeton.edu</a></td>
</tr>
<tr>
<td>OIT Support and Operations (SOC)</td>
<td><a href="mailto:helpdesk@princeton.edu">helpdesk@princeton.edu</a></td>
</tr>
<tr>
<td>Prime Portal</td>
<td><a href="https://prime.princeton.edu">https://prime.princeton.edu</a></td>
</tr>
<tr>
<td>Financial Service Center (FSC)</td>
<td><a href="mailto:finance@princeton.edu">finance@princeton.edu</a></td>
</tr>
<tr>
<td>Employee Learning Center</td>
<td><a href="http://www.princeton.edu/training">www.princeton.edu/training</a></td>
</tr>
<tr>
<td>Information Warehouse (Production)</td>
<td>Will be shared/updated on 4/30/2018</td>
</tr>
</tbody>
</table>

Documentation can be found on the Education & Outreach tab of CeDAR’s website.
thank you