

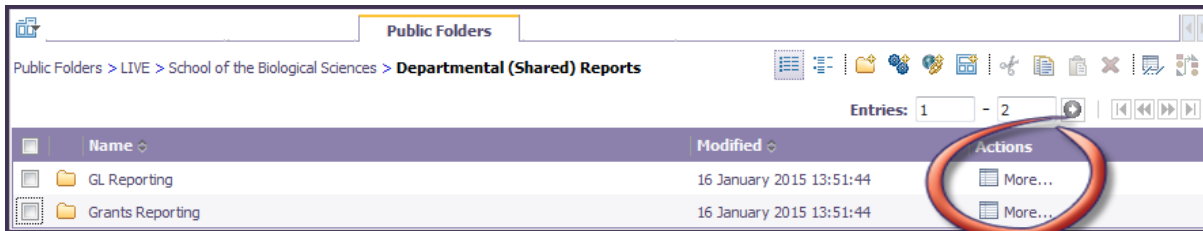


Creating Shortcuts

Cognos allows you to create shortcuts or bookmarks to both folders and reports. This functionality saves time when using either the Grants or the GL Reporting Folders. You can set up your folders to reflect your own filing system for easy access to your regularly run reports. You can create a shortcut to the same report or folder in as many places as you need.

Creating a folder shortcut within Cognos

1. From the **Public Folders** screen, navigate to the folder you wish to create the shortcut to.



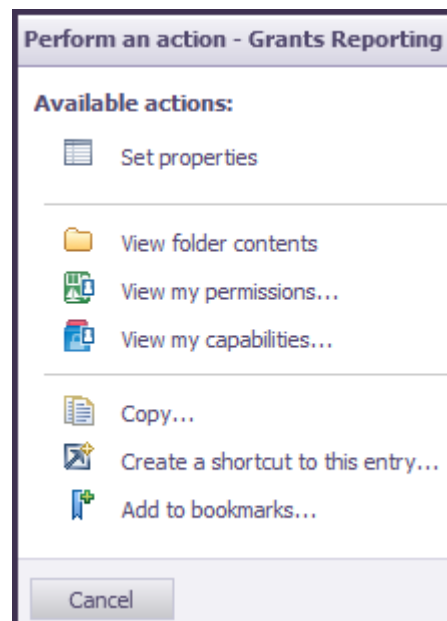
2. Click on the **More** action button for the folder you wish to create a shortcut to and the **Perform an action** screen displays.

3. Click on **Create a shortcut to this entry ...**

This enables a short cut to be created in a specified folder.

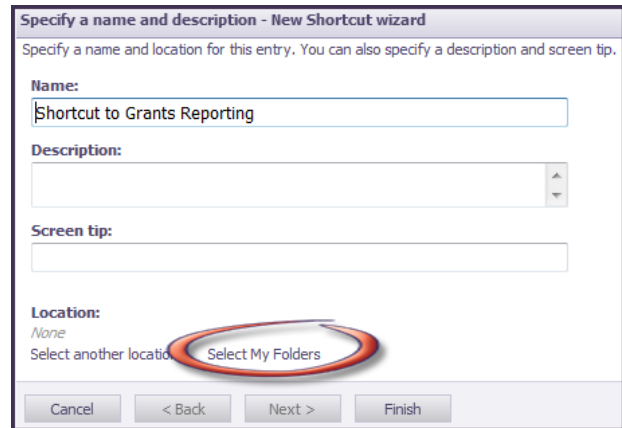
NB:

*You can also choose **Add to bookmarks**, which is a shortcut from your web browser (you will still need to log into Cognos once you click on the link in bookmarks).*



4. Ensure a location to the short cut is saved.

In this example click **Select My Folders** under the **Location** section.



Specify a name and description - New Shortcut wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:
Shortcut to Grants Reporting

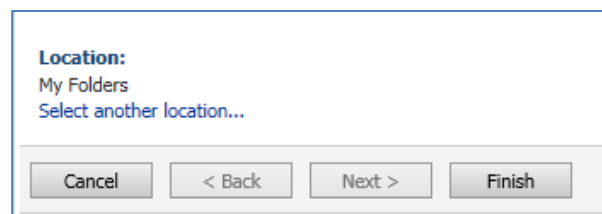
Description:
[Empty text box]

Screen tip:
[Empty text box]

Location:
None
Select another location: **Select My Folders**

Cancel < Back Next > Finish

5. **My Folders** should now show under **Location** to indicate where the shortcut will be stored.

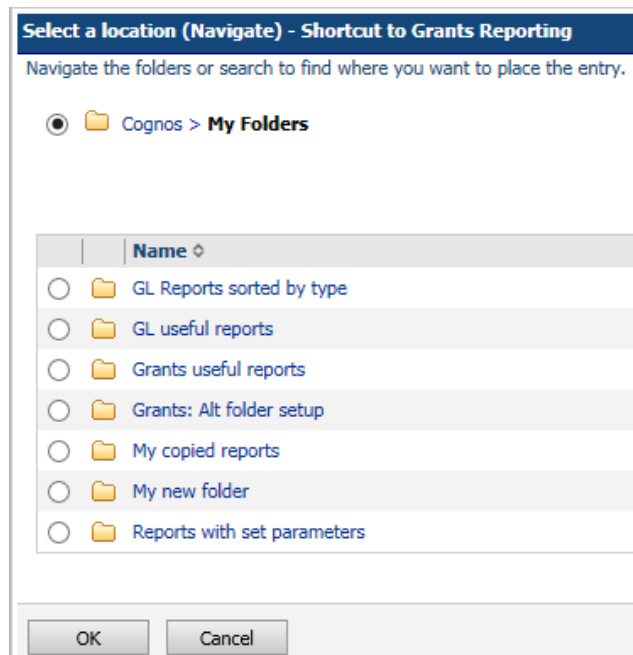


Location:
My Folders
Select another location...

Cancel < Back Next > Finish

NB: If you have set up other folders under **My Folders**, you can now choose **Select another location** again, and then choose the appropriate folder where the shortcut should appear.

Click **OK** when you've selected the folder.



Select a location (Navigate) - Shortcut to Grants Reporting

Navigate the folders or search to find where you want to place the entry.

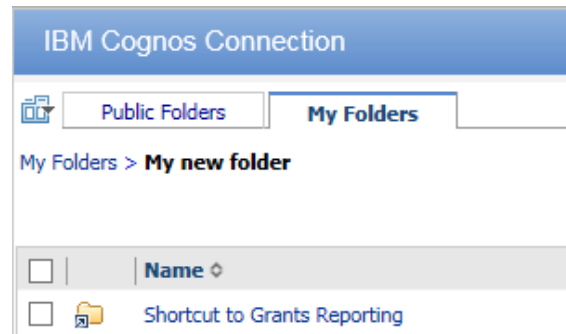
Cognos > **My Folders**

	Name
<input type="radio"/>	GL Reports sorted by type
<input type="radio"/>	GL useful reports
<input type="radio"/>	Grants useful reports
<input type="radio"/>	Grants: Alt folder setup
<input type="radio"/>	My copied reports
<input type="radio"/>	My new folder
<input type="radio"/>	Reports with set parameters

OK Cancel

6. Click **Finish** and the last page that was viewed in Cognos will display.

7. Navigate to **My Folders** tab, or to the folder that you selected, and the shortcut will display. Simply click on the relevant link.



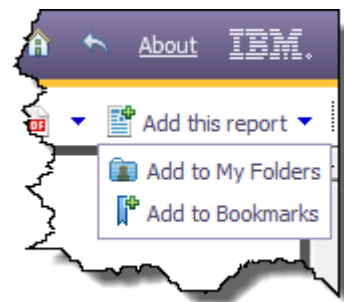
Top Tip: You could even make the **My Folders** tab your default *Home Page* by modifying the sequence of the tabs. Refer to Section 3, Portal Tabs.

Creating a shortcut to a PDF report within a folder

Once you have navigated to the report you wish to run on a regular basis, you can create a short cut. It is as simple as creating a shortcut to a folder. Follow steps 2 – 7 –in Section 6 above, but select the report you want to make a shortcut to instead of the folder.

Creating a short cut to a report after running it

When the PDF report is displayed on the screen, click on **Add this Report** then **Add to My Folders** or **Add to My Bookmarks** and repeat the steps on pages 14 and 15 to create the shortcut.



NB: If you have created a shortcut to bookmarks then you will still need to log into Cognos once you have clicked on the link. It will take you to the parameter screen of the report.

If you would like to save the actual output of a report, then once it is in PDF or Excel, save as the file of your choice, in the relevant directory.