Cognos Introduction

Version 10 Aug-2021

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1. Computing settings for Cognos users

Web browser compatibility

Prior to using Cognos Analytics please make note of the following pre-requisites and/or settings. Some of these setting can be administered globally by the relevant IT department (preferably). This ensures that all users will have the same user-experience when using the application.

IBM Cognos Analytics uses the default browser configurations provided by Internet Explorer and Firefox. Additional required settings are specific to the browser.

For Internet Explorer, the following settings are required:

- Allow Cookies
- Active Scripting
- Allow META REFRESH
- Run ActiveX controls and plug-ins
- Script ActiveX controls marked safe for scripting
- Binary and script behaviours
- Allow programmatic clipboard access.
- User data persistence
- Enable pop-ups for the IBM Cognos Analytics server

For Firefox, the following settings are required:

- Allow Cookies
- Enable Java™
- Enable JavaScript
- Load Images
- Enable pop-ups for the IBM Cognos Analytics serve

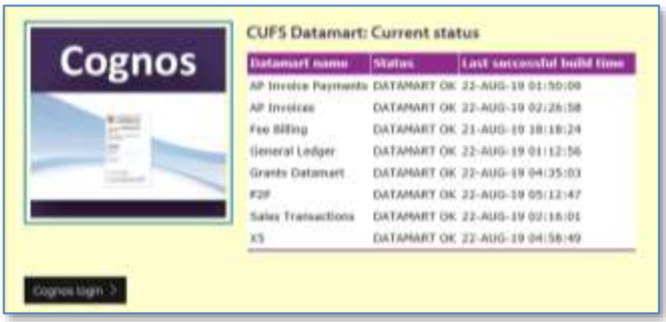
Signing in to Cognos

You need a Raven password. You also require Cognos access which is requested via your key contact.

NB: For Grants, Cognos uses the CUFS responsibility to ensure data security. Therefore, your key contact needs to request a Grants CUFS responsibility is set up or you will not be able to view any data within the reports. Please contact the FSG Finance Reporting team, fsg.system.support@admin.cam.ac.uk if there is a reason why your department does not want you to have a CUFS live responsibility.

Open your web browser (Internet Explorer recommended for CUFS and Cognos) and navigate to the **UFS** home page: https://ufs.admin.cam.ac.uk/

The Cognos login is on the Home page. Check the dates of the last successful build time for the Datamart before logging in. It is important to note this when running your reports.



- Click on the **Cognos login** link to open the **Raven Authentication**
- Enter your **CRSID** and your **Raven** password

- Click **OK** and the **IBM Cognos Connection** application opens in your browser.

Signing out of Cognos

- Use the **Account** icon, select **Sign Off** at the top right of the page

- Close your browser window

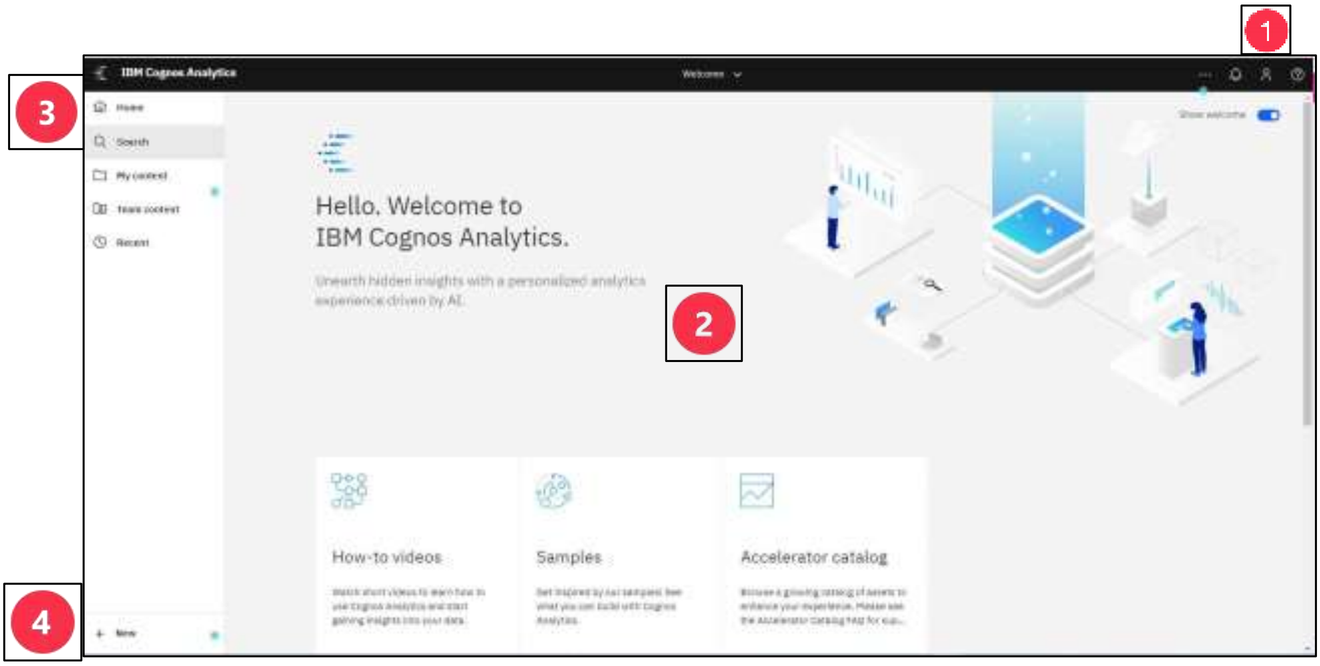
Moving to another Department

If you are moving or have moved to another department, you will need to request that your key contact completes the same online form as above to ensure that your Cognos access is amended accordingly. Don't forget to amend your email address in the CHRIS employee self-service, and the University Lookup Directory.

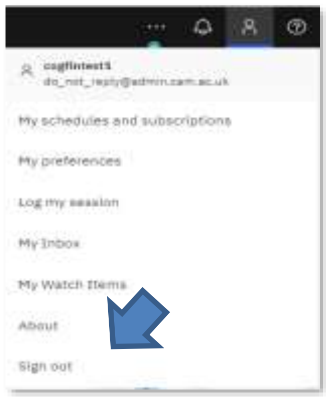
To access your own page, use this link: https://www.lookup.cam.ac.uk/self.

2. What should I see when I log in?

Once you have logged into Cognos Analytics, users will see the screen shown in the image below, each numbered icon is explained further below.



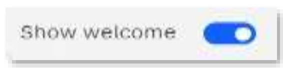
❶ This is where users are able to change setting and preferences, view current schedules and check alerts.



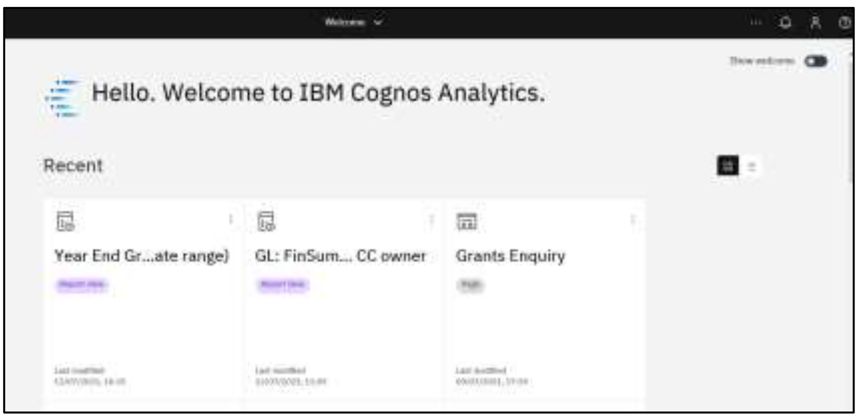
The current home page is a default.

NB: Use this menu to **Sign out**

❷ This is the main **home page** display and will over time show recently accessed reports. The top, welcome, section can be switched off by changing the **Show welcome** icon option.

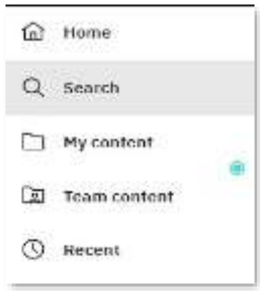


NB: Switching the **Show Welcome** off is recommended.



3 In this section, users can:

- search for reports using the **Search** option,
- view saved personal reports in the **My Content** (*this is the equivalent of My folder in Cognos 10*),
- view shared reports in the **Team Content** (this is the equivalent of Public Folder in Cognos 10)



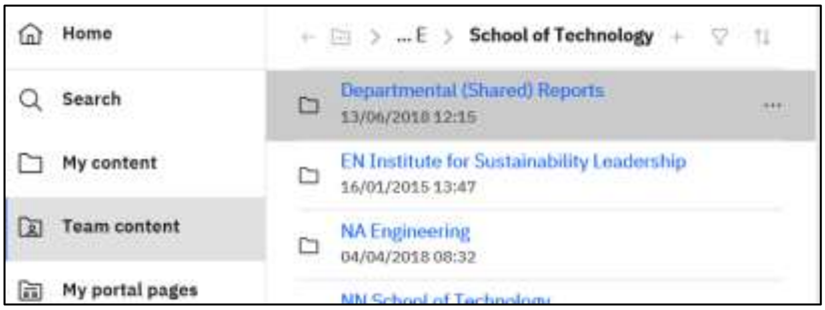
4 In this section, certain users will be able to access options to create or author reports using **Report** and or **Query Studio**

Team content

This is where the standard University reports are listed.

- Select **Team Content** from menu on left (See 3 above)

- Navigate to **Live**, select your **school** folder, and then **Departmental (Shared) Reports** to find a standard report

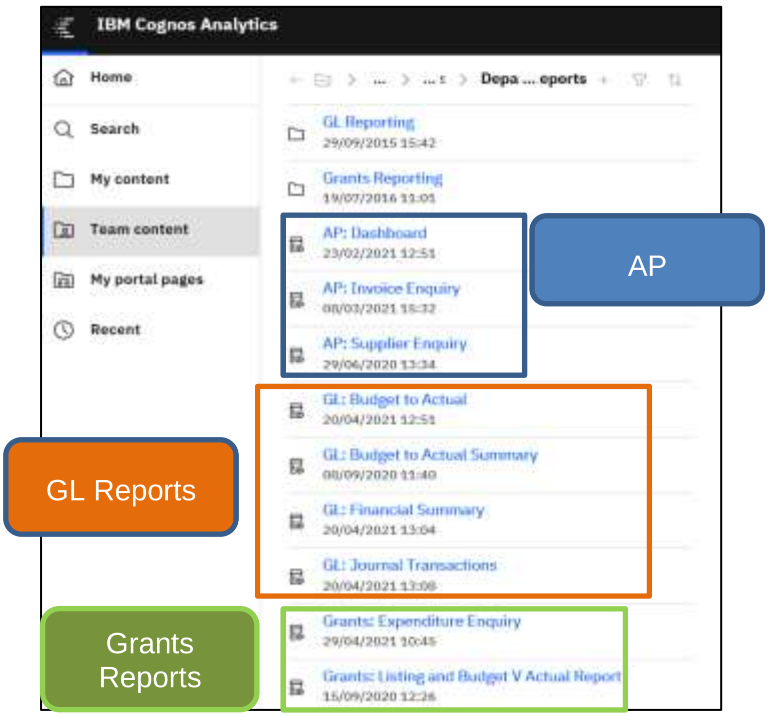


- The reports in this folder are the same across all schools.

  Access to the reports is dependent on your CUFS responsibility.

  Depending on this, you will see one or more of the following:

  - The **GL Reporting** folder. This is no longer used. Instead, standard GL reports are listed directly in the Shared folder.
  - The **AP Dashboard** suite
  - The **Grants Reporting** folder **and** two Grants reports below the GL ones.



If you are unable to view the list of Departmental (shared) reports for your school, please contact fsg.system.support@admin.cam.ac.uk and ask them to check your set up.

Grants reports

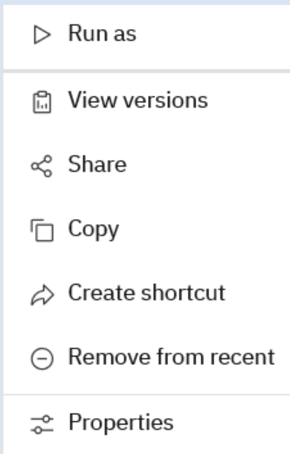
Grants reports are in the process of being consolidated. Currently there are two consolidated Grants reports, which are listed directly in the **Department (Shared) Reports** folder, under the GL consolidated reports, as shown above. The rest of the standard Grants reports are available from the **Departmental (Shared) Reports > Grants Reporting** folder. In some cases, widely used reports may also be in the Grants Reporting sub-folder, **Other**.

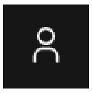
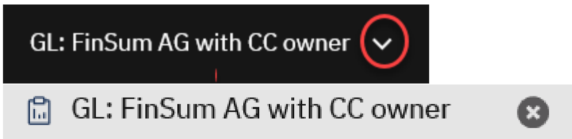
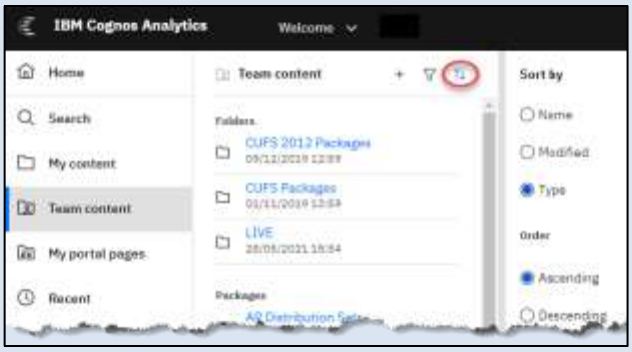
General Ledger reports

All the GL reports have been consolidated and appear directly in the **Departmental (Shared) Reports** folder. The GL reporting folder will be removed as it is no longer used.

Useful actions

Look for the **ellipses…** (More). These appear on the right hand side of folder and reports and detail all possible actions. These ellipses appear in a vertical line on the **Homepage**, where recently run reports appear as tiles.

Icon/Arrow/Tool	Name	Function
	**Action menu**	**Available Actions from recently run report tile** 

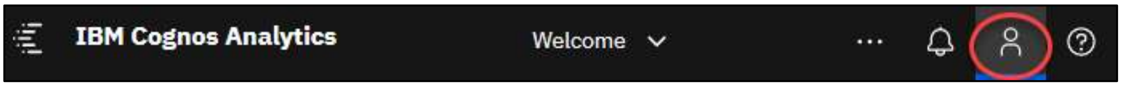
	**User (CRSID)**	Set up preferences (report formats), check scheduled reports,
	**Run as**	Allows you to check/change report output.
	**Name of Run Report**	Exit/Close the report that's showing on screen
	**Run**	Change/re-select parameters once in a report
	**Run**	Change report output from within report, i.e. From PDF to Excel
	**Sort**	Arranges the reports/folders in any list, e.g. **My content** or **Team content** **NB** In **Team Content**, change **Sort** to **Type** and **Ascending** to show **LIVE** folder near top of list

3. Setting preferences

You can set your preferred report output as a default.

Saving a report format preference

1. On the **Cognos Analytics** banner, click on the **User** icon.

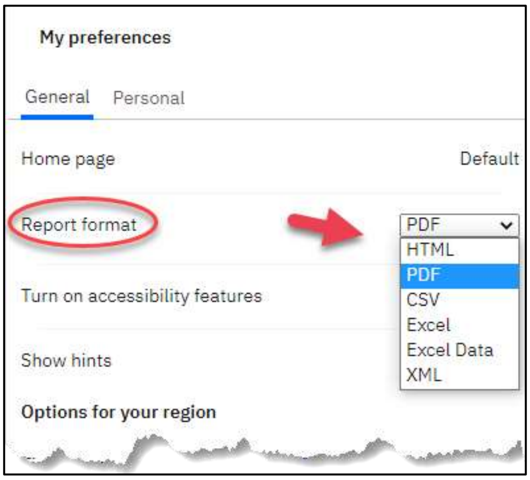


2. Select **My preferences** from the available options

3. The only setting that requires changing here is the **Report Format.** Set this option to your personal default preference.

   PDF is recommended particularly when viewing reports initially. There are tools which are only available when using PDF view, such as quick re-select of parameters. It is easy to use the **Run as** option to export to Excel when ready. Does NOT work vice versa.

   NB: If the report writer has set the report default to Excel, it overrides your preference. In these instances, use the **Run as** function (Go to **ellipses…** on right of report name) BEFORE executing the report.



My Schedules and subscriptions

You can also use  to check your scheduled reports using the relevant option.

Use this to check which reports you have scheduled, view run history, modify, remove or disable the schedule. Refer to Working with scheduled reports below.

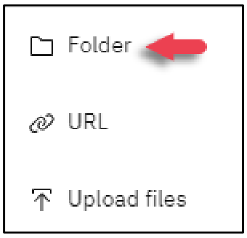
4. *Customising Cognos using My content*

Cognos allows you to personalise your views. The simplest way to utilise this is to set up your own folders in **My content**. This is your personal filing system and you need to set it up to suit your particular reporting requirements. It is not advisable to make shortcuts or copy reports indiscriminately in **My content** as it quickly becomes difficult to find items.

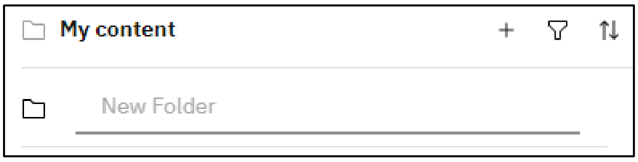
Creating a new folder

Navigate to **My content,** select the **+** sign

From the context menu, select **Folder**



Type in a name for the new folder, and **Enter**



A pop up confirmation appears

The created folder appears in alphabetic order

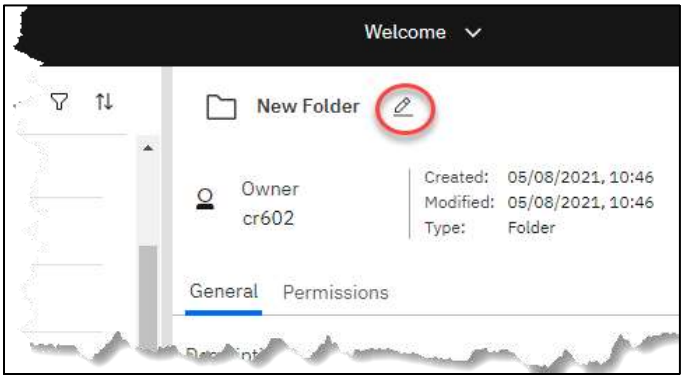
Working with folders

You can change the name, description, create sub-folders and sort the list.

To change the name of a folder, select the **ellipses…** and then **Properties** from the **Action List**

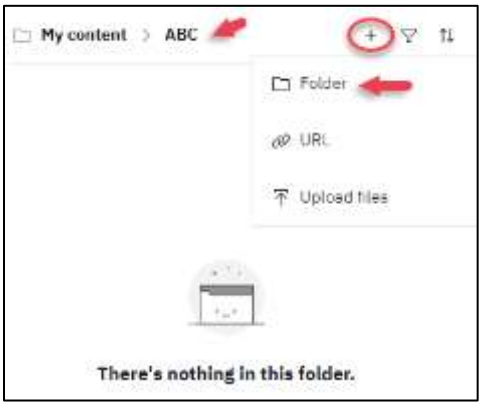
Choose **Edit**, then amend name. **Enter** to effect change.

Edit **Description** if more information about the folder is required.



To create subfolders

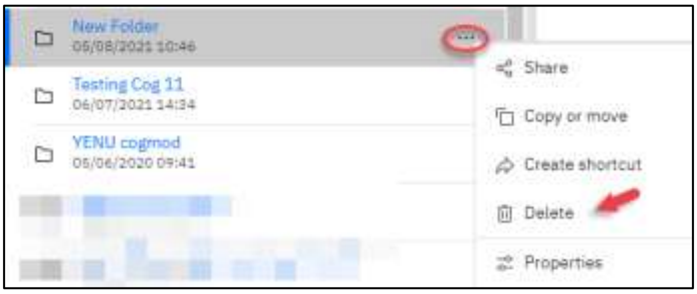
- Open the folder where the sub-folder is to be located
- Choose **New** + > **Folder**
- Proceed as above



Use **Sort** ⇅ to move folders around. If you are consistent with your naming convention, the **Name** sort is useful to group different folders, e.g. by GL or GM (Grants)

Deleting a folder

Locate the folder to be deleted, choose the **ellipses…**, then **Delete** from the **Action List**

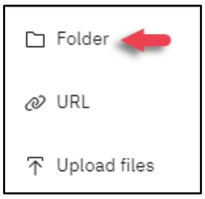


Adding a link

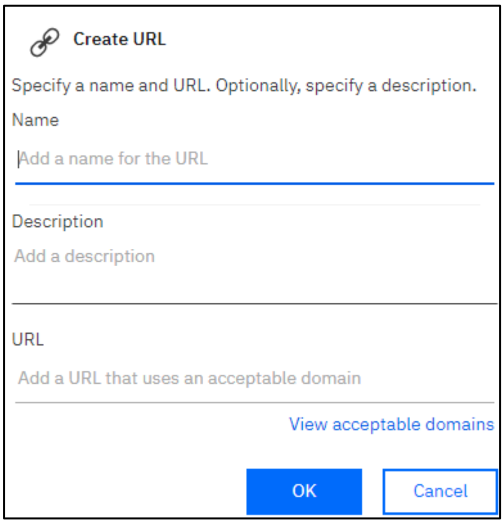
NB: This function is under investigation and is not currently working.

Navigate to **My content,** select the **+** sign

From the context menu, select **URL**



Give the URL a name, description as appropriate and paste in the link.



5. *Finding and running reports*

The data used in the Cognos reports is extracted from the University Finance System overnight. Therefore, transactions and balances will be as at the end of the previous working day, unless notified otherwise.

Finding the reports

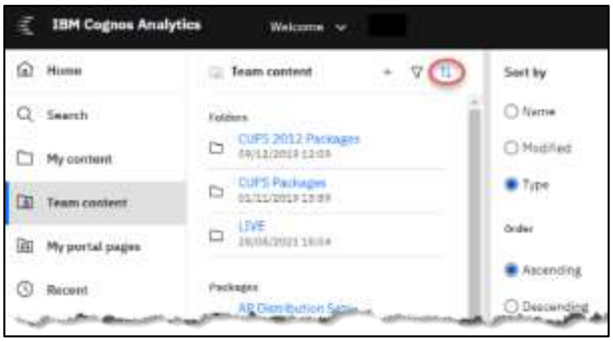
To find and run reports log on to Cognos Analytics and follow either one of these two methods to locate a report:

- navigate via the folders; or
- use the **Search** feature.

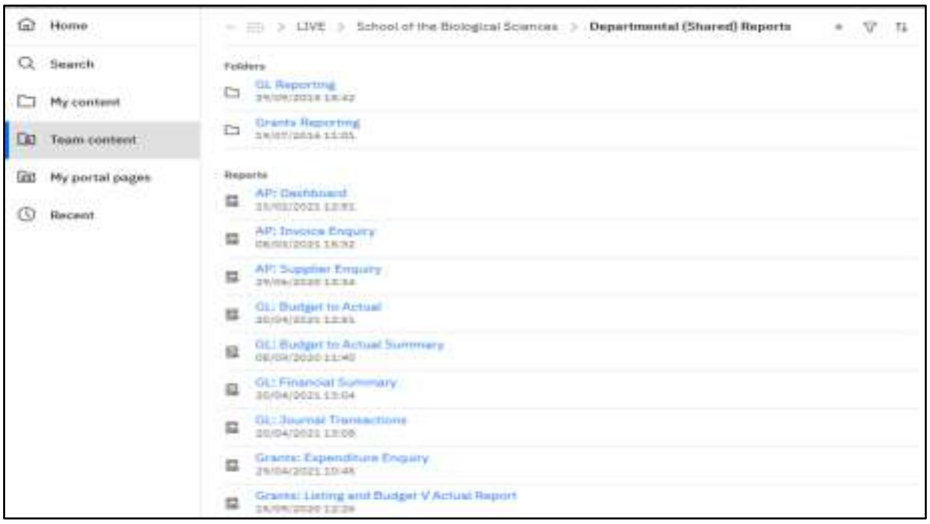
Method 1: Navigate via the folders

From **Team Content,** navigate to **LIVE**, select your school folder, and then **Departmental (Shared) Reports** to find a standard report

Tip:
Use the **Sort** function so that **LIVE** appears near the top of the list in **Team Content**

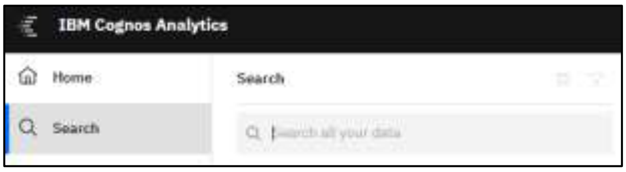


By following the above path, and depending on your Cognos access, you can run the standard GL or Grants reports, open the **Grant Reporting** folder to access further grants reports, or use the AP reporting suite. However, if you select your department **named** folder you will find any bespoke reports that have been set up by your department accounts team, not Central Finance.



Method 2: Use the Search function

Select **Search**



Enter all or the partial name of the required report

As you type the report name some results containing the name or partial name will start to show up in the result box. Ensure that the path of the report (in the result – as shown below) is correct

NB: This method is not efficient for most department users as it returns too many results.

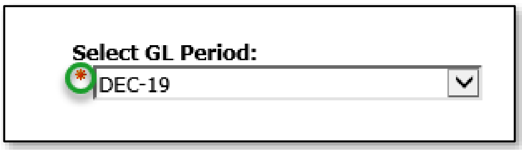
Running a report

To run using the default settings:	Select the report link
To change the report output:	Select the **ellipses …** next to the report to reveal more run options. Choose **Run as** to change the report output format e.g. HTML, PDF or Excel

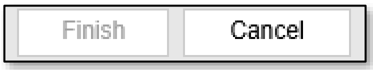
Report parameters

Cognos reports require the selection of various options in order to achieve the desired output. These selection options are unique to the report selected and their position is dependent on the report designer. Ensure you read the header for each selection box before completing, i.e. Project number vs Award number, Project Organisation vs School or Department, Item date vs GL date.

A **red asterisk** next to a field selection box indicates completion of this field is mandatory.

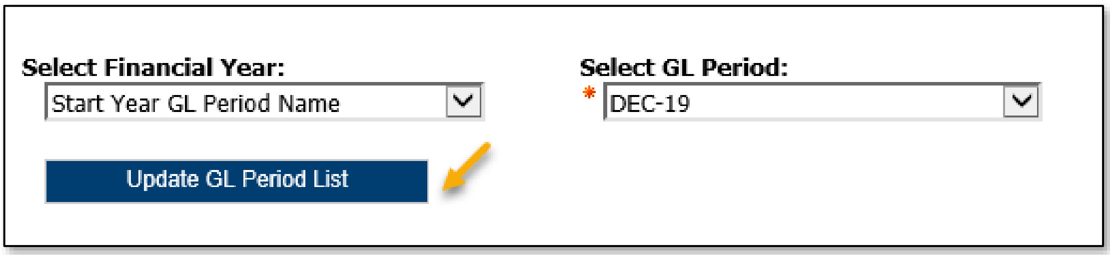


Until the mandatory field(s) is/are completed, the ***Finish*** button at the bottom of the report is inactive, i.e. greyed out.

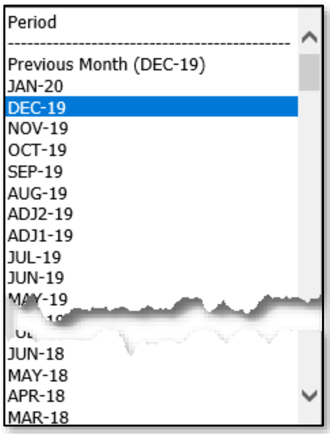


NB: The **Finish** button is NOT always on left! **Check** to avoid cancelling your report.

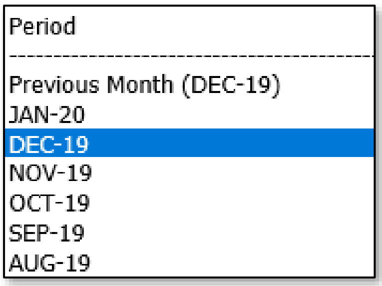
Some selection boxes require the previous box to be completed before choosing the **Update <field>** button. This action populates the linked field with appropriate data. For example, if the Financial Year is selected, when the **Update GL Period List** button is activated, **only** the GL periods (months) for that specific year are listed in the GL Period selection box.



Before Year selected and list updated:



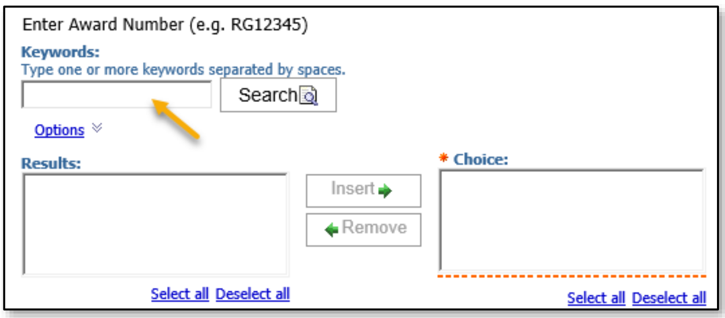
After Year selected (19-20) and list updated:



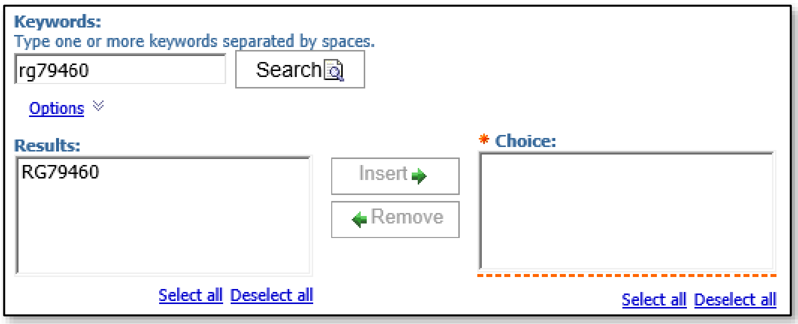
NB: Making use of this selection function is optional, as are all selection fields, **unless** there is a red asterisk. You do **NOT** need to complete **all** selection boxes. Depending on your responsibilities, you may only be able to see one department or only one cost centre. In these cases, the selection options are much more limited than a person who has the whole school responsibility.

Another type of selection that you may need to use requires that you complete the appropriate box, then move the resulting item to the **Choice** field. You cannot type the item directly into the **Choice** box.

Type in the keyword and select **Search**

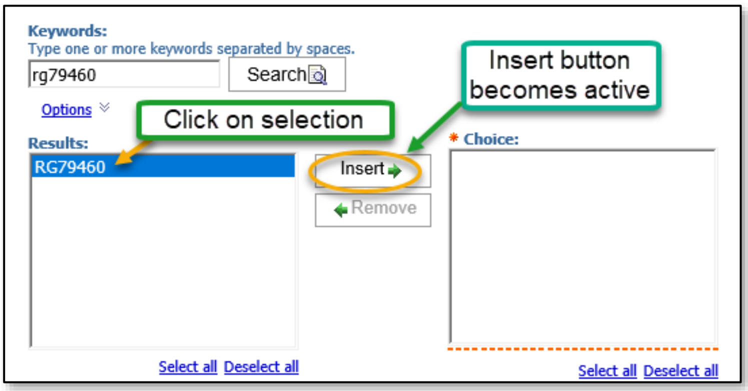


The system returns the match in the **Results** box.



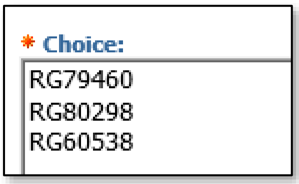
Until you populate the **Choice** box, the mandatory field is not activated

NB: If you want more than one choice, you need to use **Insert** each time from the **Keywords > Results,** as a new keyword/result overwrites whatever is in the **Results** field.



Repeat selection of keyword and insert action as required

Once there is a least one item in the Choice box, the dotted line under the box disappears. This indicates that the mandatory requirement has been met.



Click **Select all** if more than one choice

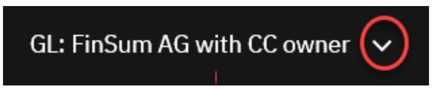
Use the **Remove** button to delete items from the **Choice** box.

NB: If using the re-selection/change parameters function, don't forget to update these choices if necessary.

Select **Finish** to run the report

Exiting the report

Select the arrow next to the header (name of run report)



Choose **Close** 

Each closed reports shows as a tile on the homepage.

This tile can be cleared by using the **ellipses…** to display the **Action Menu**.

Select **Remove from recent** to delete tile.

Working with a report in PDF format

If you have selected PDF as your report format option, the following icons, which display at the top left of the report screen are useful.

Action required		
Change/re-select parameters once in a report	Run	
Change report output from within report, i.e. From PDF to Excel	Run	
Download or Print report		

Emailing reports

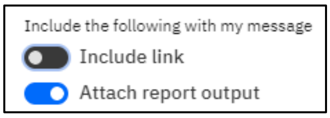
NB: The option to attach a report output using **Share** from within a report is currently not available and is under investigation.

In the meantime, use the **Download** function, save the report and attach to an email using **Outlook**, or alternatively, use **Run as**, and select **Run in background** before running report, refer below.

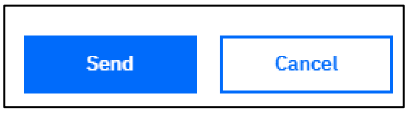
1. On the **Cognos Analytics** banner, click on the **Share** icon. Select **Send**

2. Enter receipient (use crsid@cam.ac.uk), subject and message.

3. Switch off **Includes link**
4. Switch on **Attach report** output



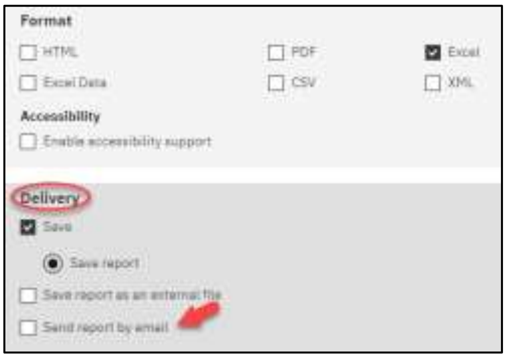
5. **Send**



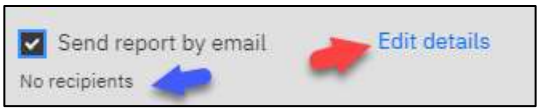
Running the report in the background and email option

Alternatively, before you go into the report selection parameters, use the **ellipses…** next to the report name to select **Run as**, then switch on **Run in background**.

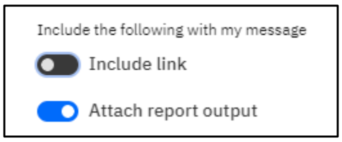
When **Run in background** is enabled, a **Delivery** section opens below the **Format** and **Accessibility** section, where you can select the **Send report by email** option. Leave **Save** ticked.



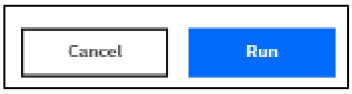
By ticking **Send report by email**, the option to **Edit details** is displayed.



Add recipient(s), subject and message, ensuring recipient's full @cam.ac.uk email address is used. Ensure that **Include link** is disabled, and **Attach report output** is enabled.



When completed, select **Run**.



6. Shortcuts

You are able to create shortcuts to both folders and reports. Shortcuts are stored within **My content**, and you can create many shortcuts to the same report or folder as required, depending on your folder setup. A shortcut is not the same as a copied report, and cannot be used to set up a report view or a schedule.

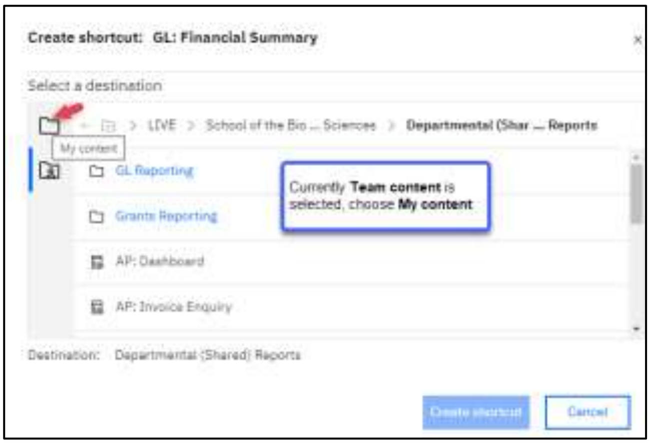
Create a shortcut to a report

Search or navigate to the location of the report. In this case the search path is as follows:

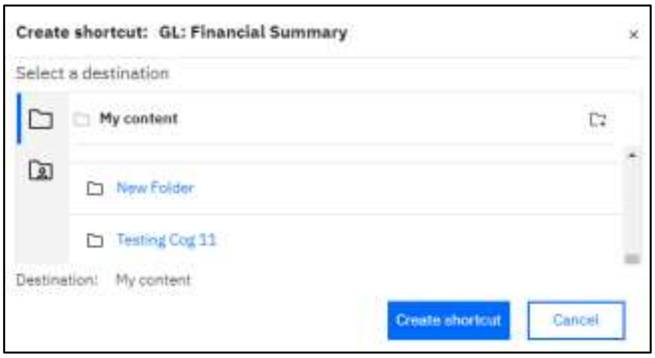
Team Content > Live > School of the Biological Sciences > Departmental (Shared) Reports > GL: Financial Summary

Select the **ellipses …** next to **GL: Financial Summary** to reveal the context menu, then select **Create shortcut**

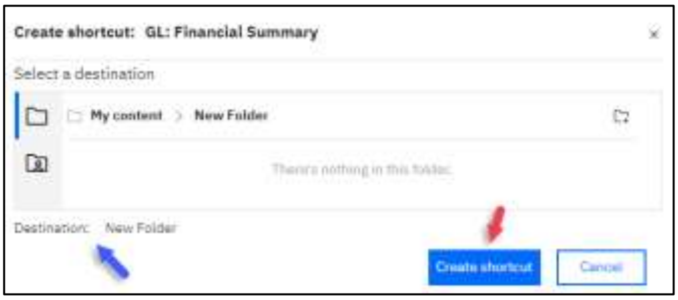
In the dialogue box, select **My Content**



Select **New Folder**



Choose **Create shortcut**.



A shortcut to the report will now be placed in the selected folder

The result is prefixed with **Shortcut to. T**his is the default a naming convention but it can be renamed as required.

Create a shortcut to a folder

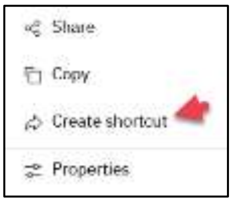
For this illustration a shortcut to the **Departmental (Shared) Reports** folder will be created in a within **My Contents**.

Search or navigate to the location of the report.

In this case the search path is as follows **Team Content > Live > School of the Biological Sciences > Departmental (Shared) Reports**

Select the **ellipsis …** next to the folder to reveal the context menu

Select **Create shortcut**



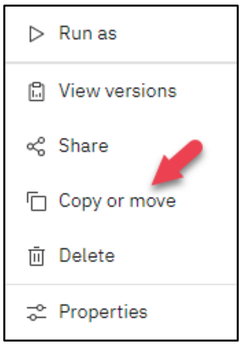
In the action box, choose **My content**, and a sub-folder, if appropriate.

Check **Destination** is correct, then select **Create shortcut**.

A shortcut to the report will now be placed in the selected folder

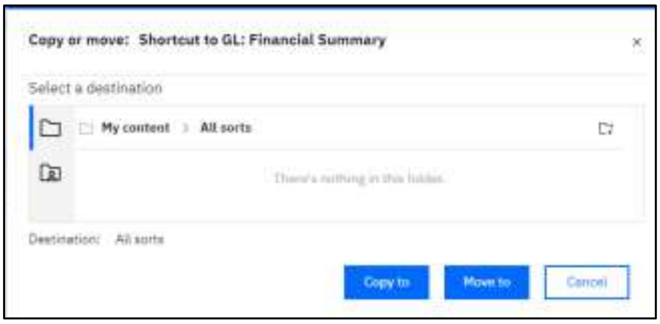
Move or copy a shortcut

Locate the shortcut to be moved or copied, select the **ellipses…**, choose **Copy or move** from the action list

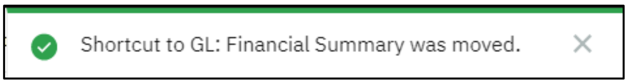


Select a destination

Choose **Copy to** OR **Move to**

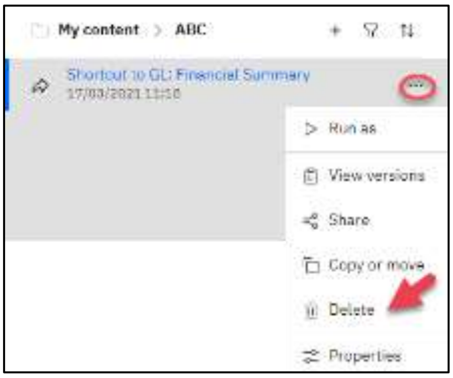


A confirmation of successful action appears briefly at top of screen



Delete a shortcut

Locate the shortcut to be deleted, select the **ellipses…**, choose **Delete**



Select **OK** to **Confirm delete**

7. Copying reports

The report copy function MUST be performed before a **Report View** or **Schedule** is set up. It is recommended that you create a folder(s) in **My content** to make finding reports easier. You can make as many copies of a report as you require.

NB: Ensure you differentiate **copied** reports from reports to which you have made a **shortcut**. The best way to do this is CHANGE the name of any **copied** reports, and LEAVE the default naming “Shortcut to” for **shortcuts**.

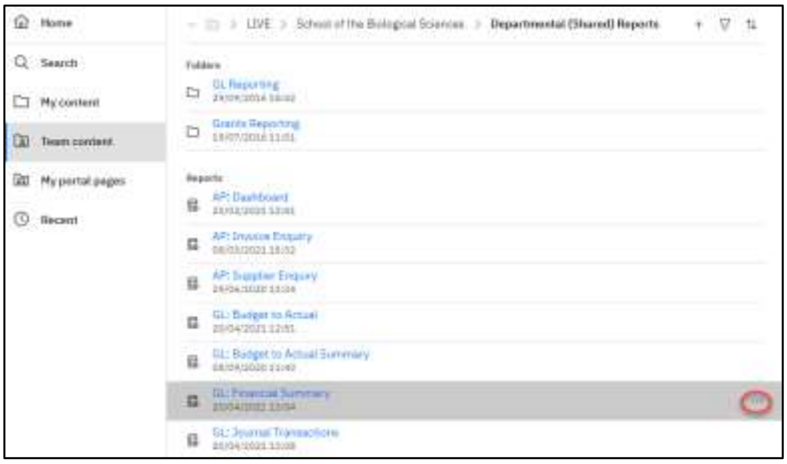
You **cannot** schedule or set up a **Report View** from a **shortcut**.

Copy a report

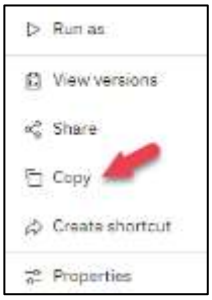
For this illustration a copy of **GL: Financial Summary** will be taken and placed inside a folder called **ABC,** within **My content**.

Go to the report you wish to copy by either searching for it by name or navigating to its location

Select the **ellipsis …** next to the report name to reveal the context menu

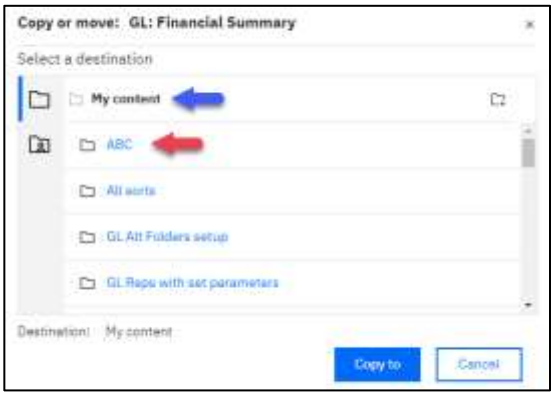


Select **Copy**

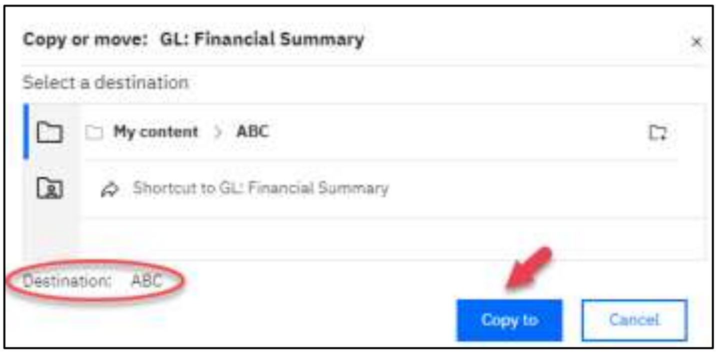


In the dialogue box that appears:

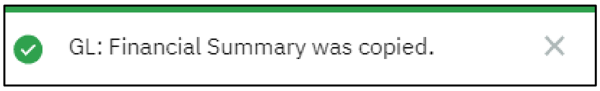
- select My content
- if appropriate, select your folder e.g. **ABC**



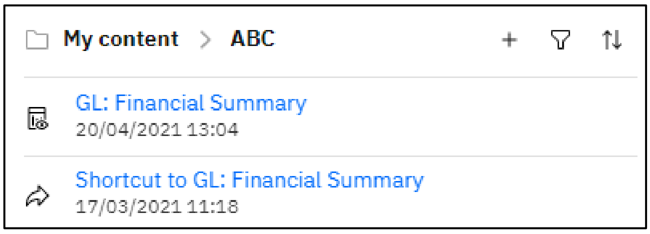
Check the **Destination** is correct, then select **Copy to**



A confirmation messages appears briefly at top of screen



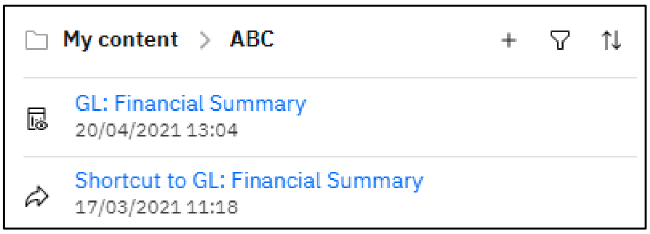
A copy of the report will now be placed in the selected folder



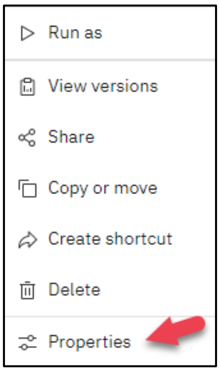
Rename the copied report

It is advisable to change the name of the copied report as soon as you make the copy. You should make the name descriptive so you know what parameters you are saving, or what the schedule involves. You can make many copies of the same report, as required, so each one should have a different name.

Navigate to the copied report, and select the **ellipses…** next to the name



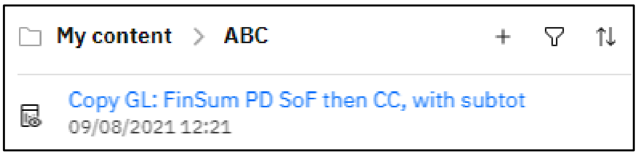
Choose **Properties**



Hover over name until **Edit** icon appears

Type in the name and description if desired

The report name is changed



8. Report View

A **report view** is a copy of a report that is stored in your personal content. A report view can be set up so that associated prompt values, including format, can be pre-selected and saved with the report view. This allows the report to be re-run quickly when required, although, for some reports, you may need to update the period parameter each time. It is also possible to schedule and run this report view using those values.

NB: You must always make a **copy** of any report before saving your own parameters. Copies must be made from reports in **Team content.**

Creating a Report View

1. Find the base report

   Navigate to **Team Content** and locate the report you require. In this example, we use the **GL: Financial Summary**, then select the **ellipses…** and choose **Copy**

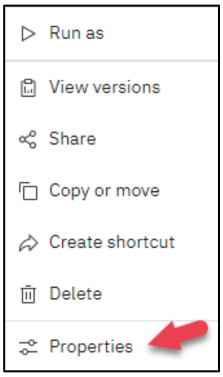
2. Copy the report

   Navigate to an appropriate place in **My Content** for the report, select **Copy to** (For detailed guidance, refer to Section 7 above.)

3. Add report properties and parameters to your view

   Select the **ellipses…** next to the name of the report you copied

   Select **Properties** to reveal the next dialogue box



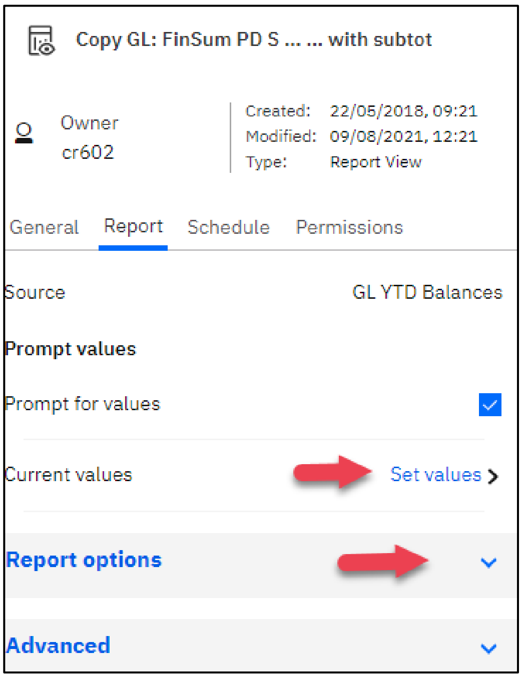
   General:

   allows users to disable the report view entry if no longer needed, view source report, permissions, and search path

Report:

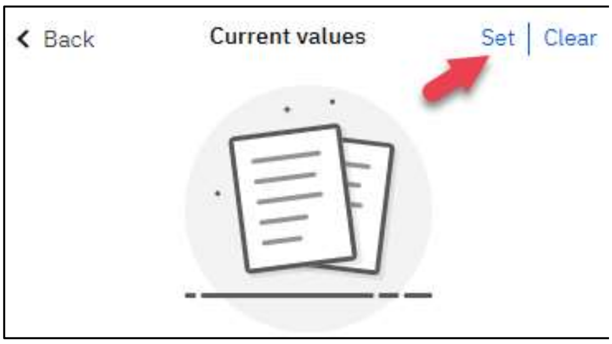
allows users to set/edit/clear prompt values, change/set report output format i.e., HTML, PDF, Excel and change other advanced settings

- Use **Current values > Set values** to set report parameters
- Use **Report options** to set report output/delivery



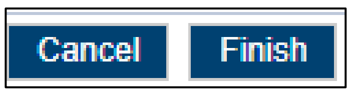
4. Setting **Current values**

Select **Set values** > **Set** and the available parameters will display

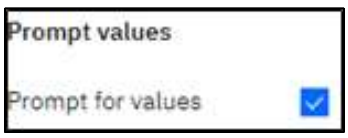


A message displays whilst the report parameters screen is generated

Choose the parameters you want to default in and select Finish from bottom of report parameter screen

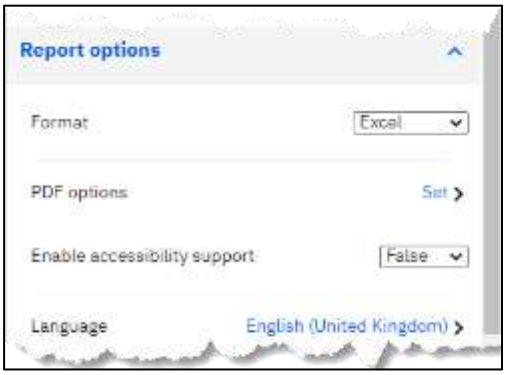


We advise you NOT to uncheck the **Prompt for values** box as you may want to change a particular selection **before** the report runs, e.g. GL period, cost centre, project. By leaving the box checked, the parameter selection screen appears each time you run the report. Your saved selections default, but you have the opportunity to change one or more of the values, if required, for this instance. If no changes required, choose **Finish**. If you uncheck this box, the report displays the output immediately, with pre-selected parameters.



5. Setting **Report options**

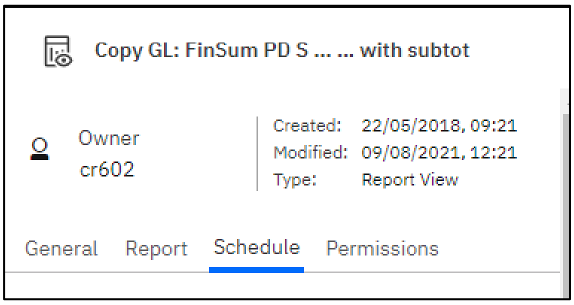
Select  to display options and choose desired format



6. Scheduling your **Report View**

Select **Properties** to reveal the dialogue box

Schedule: allows users to set/edit or delete a schedule for this report view – see **Scheduling a report**



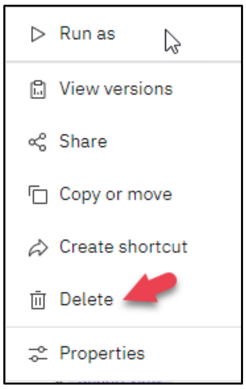
Working with Report View

To permanently change any of the Report View parameters, repeat steps above, and make your changes in the **Set values** or **Report options** sections.

If you have left the **Prompt for values** checked, you are able to change the selections for a particular instance, but this does not change the saved values.

Deleting a Report View

Navigate to the relevant report, select the **ellipses…** and choose **Delete**.



9. Scheduling a report

NB: You must always make a **copy** of any report before setting up a schedule.

Scheduling reports is very useful if you would like to run the same report/s on a regular basis or have a report delivered to a colleague whilst you are away.

It is better to avoid scheduling reports with date parameters as these need to be updated each time before the scheduled report runs. However, for GL reports there is an option to choose **Previous Month** as the GL period. This automatically updates each month on 1st of new month.

Creating a schedule

1. Copy the report to be scheduled

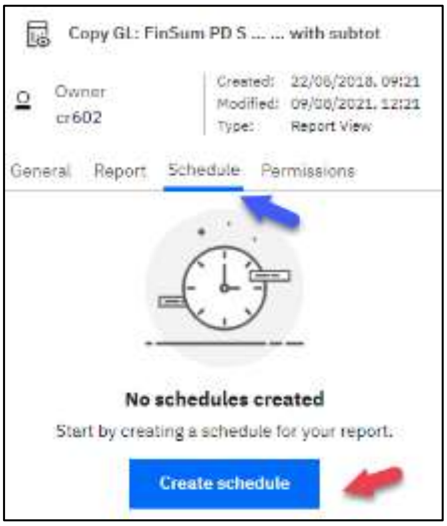
   Before setting up a schedule, the report must be copied to My content

2. Navigate to the copied report to be scheduled

   Select the **ellipses…** next to the report name to reveal the context menu.

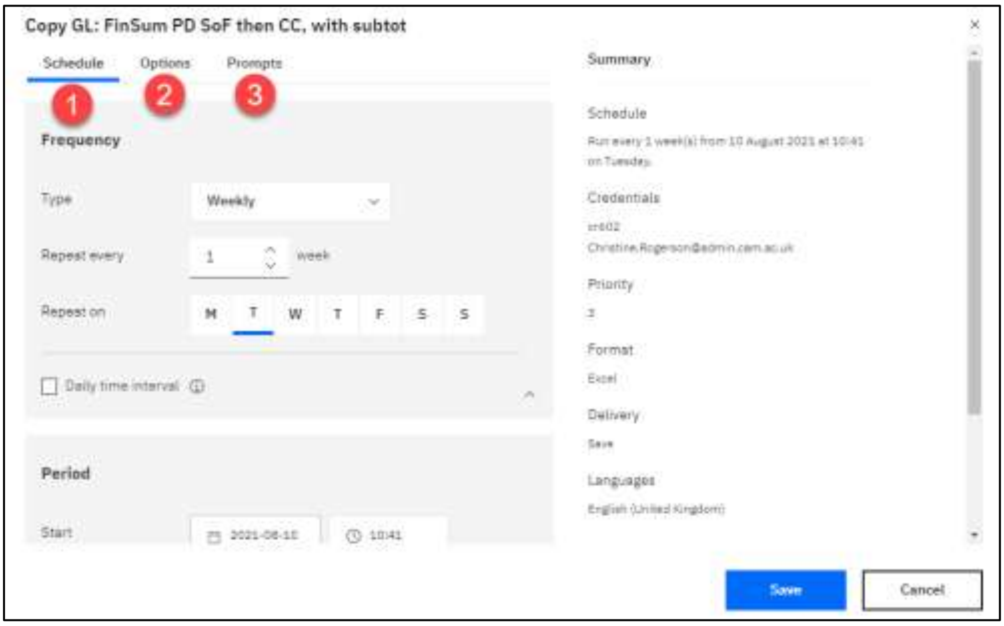
3. Create the schedule

   From the context menu, select **Properties**



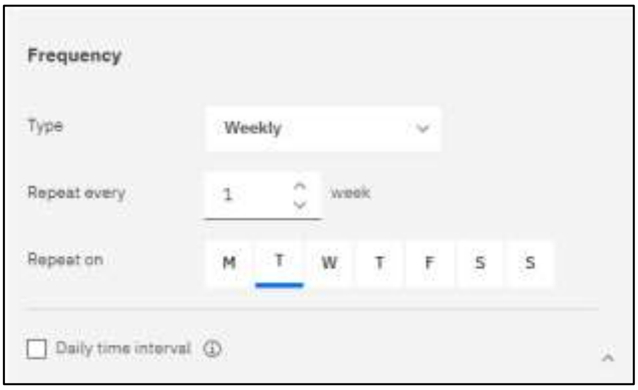
4. Select the **Schedule** tab, then choose **Create schedule**

The **Schedule** screen has 3 tabs: **Schedule, Options** and **Prompts**

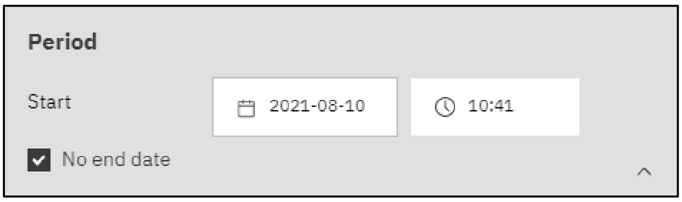


1 The **Schedule** tab: Set the **Frequency** and **Period** here

Frequency
Specify how often you want the report to run (i.e., weekly, daily or monthly), and on which day.



Period
Provide a start and end date for your schedule, or select **No end date**

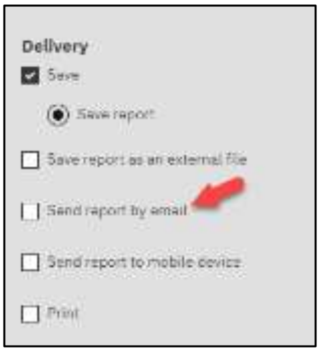


2 The **Options** tab: set the **Output format** and **Delivery** method here

Choose appropriate report format

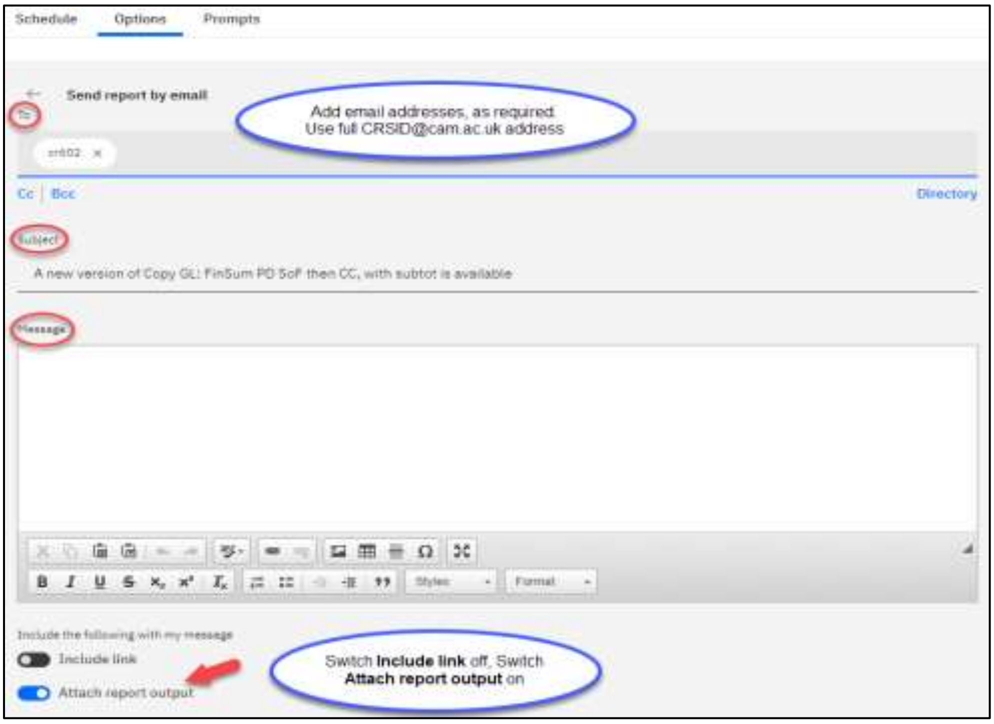
Choose how the report should be delivered.

Recommended: Tick **Send report by email.**



Once the Send report by email box is ticked, choose **Edit details**

On the next screen, complete the email as required. **NB**: Switch on **Attach report output.**

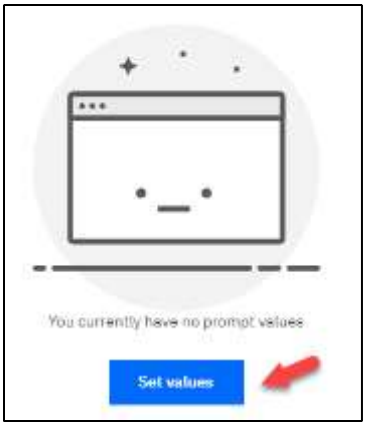


3 The **Prompts** tab: set the **Values** (selection parameters) required to run the report here

Select **Set values**

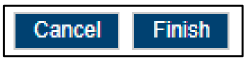
The report's selection parameters screen appears.

Set your desired parameters



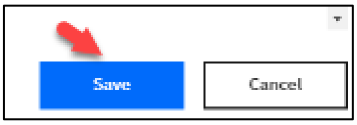
Choose **Finish** at bottom of report selection screen

You will be returned to the **Schedule** screen.



Check the **Summary**

5. **Save** the schedule



A confirmation message is displayed briefly at the top of the screen.

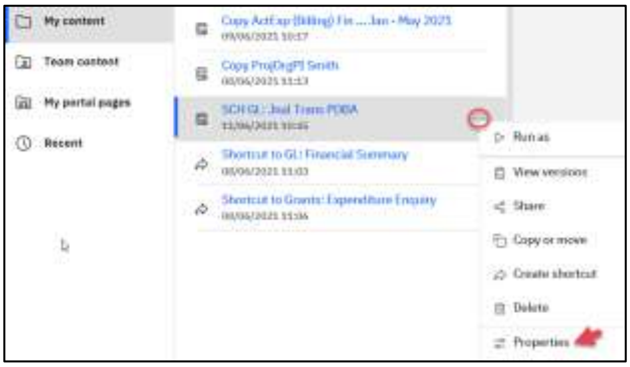
Editing a scheduled report

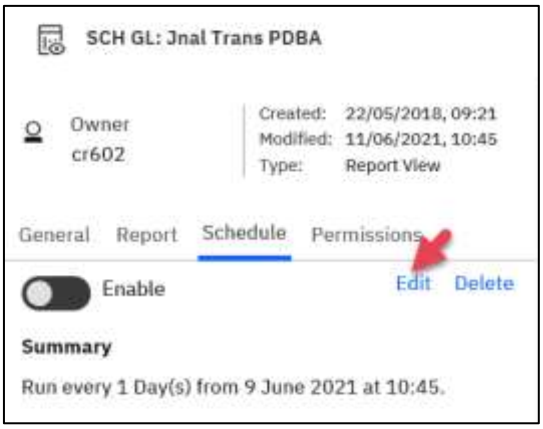
Once you have scheduled a report, you may need to change the delivery schedule or edit the report parameters. There are **two** ways of actioning schedule modifications.

Method 1

Find the report in **My content**, select **the ellipses…** next to the report name to reveal the context menu.

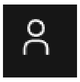
From this menu select **Properties.**

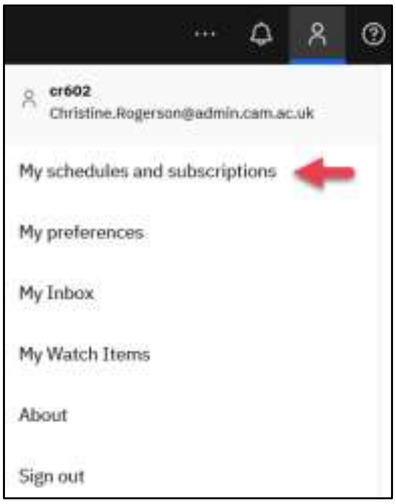




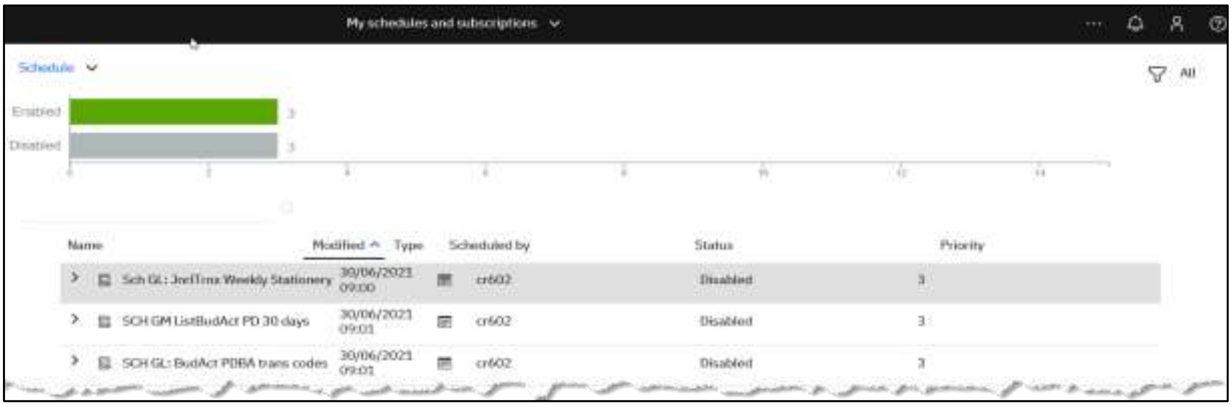
- Select the **Schedule** tab, then choose **Edit**
- If using this method, go to **3 tabs on the Schedule** screen

Method 2

Alternatively, Use  (user), select **My schedules and subscriptions**

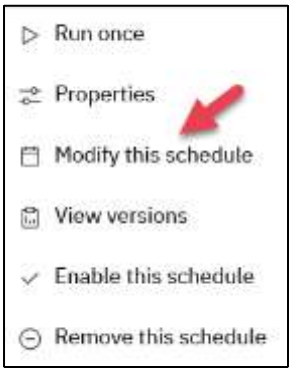


- A list of all your schedules appears

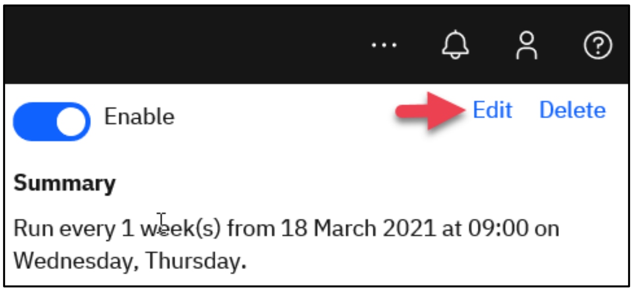


- Choose the report you wish to modify, and click on the **ellipses…** on the right

- From the options, select **Modify this schedule**

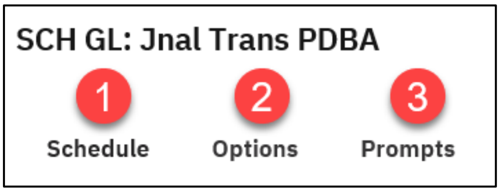


- Choose **Edit**

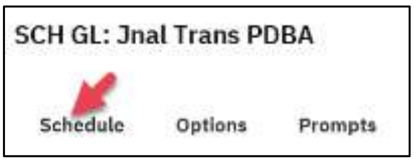


Whichever method you choose, the following applies.

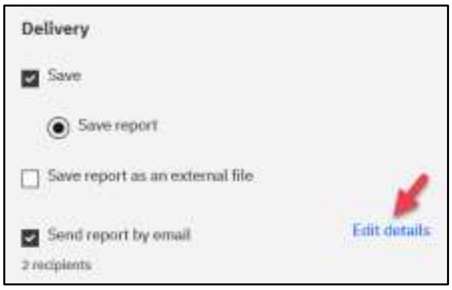
There are 3 tabs on the **Schedule** screen



1 Use the **Schedule** tab to change the **Frequency** or **Period**



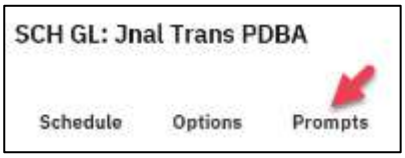
2 Use the **Options** tab to change the **Format** or **Delivery**

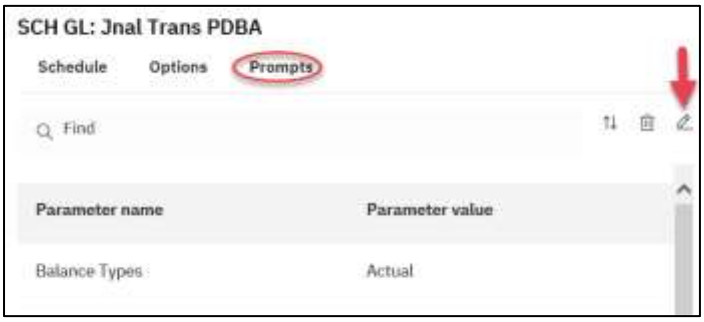


- To change email recipients, go to **Edit details** in **Delivery** section.

- Ensure **Attach report** output is selected when sending emails.

3 Use the **Prompts** tab to change the **Values** (parameters)

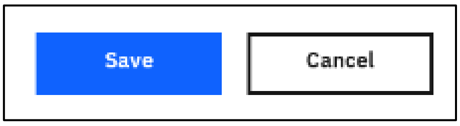




- Select the **Edit** icon

- The report parameter selection opens. Modify as required. Choose **Finish**

Select **Save** when all edits have been made to the 3 tabs.

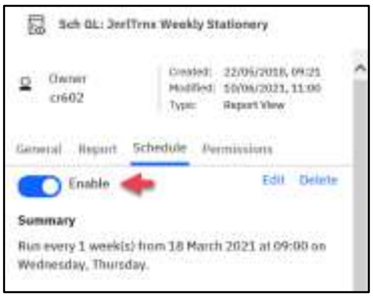


A message appears briefly at top of screen"

Disabling or enabling a Schedule

Method 1

My Contents > Report > ellipses … > Properties > Schedule



Method 2

User > My schedules and subscriptions > Report > ellipses… > Modify this schedule

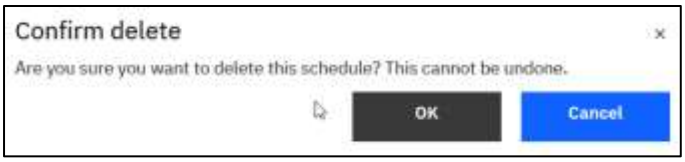
Use the toggle button to **Enable/Disable** your schedule. The button is greyed out when disabled (Enable off) 

NB: Use this function if you are away from work and do not want the report to be emailed to yourself during this period. This saves you having to edit the **Period** of your scheduled report before and after your absence.

Deleting a Schedule

If you no longer need your schedule, you can delete the schedule, but once deleted, it cannot be restored. It may be safer to **Disable** it instead (see above).

1. Navigate to the schedule
   - either from **My Contents > Report > ellipses … > Properties > Schedule;** or
   - from **User > My schedules and subscriptions > Report > ellipses… > Modify this schedule**,
2. use the **Delete** option (next to **Edit)**.
3. A popup appears requesting confirmation of deletion.



The schedule is deleted and will no longer be available.

Viewing a schedule

Navigate from **User > My schedules and subscriptions.** A list of your schedules will display.

Select the schedule to be viewed, and choose the **ellipses…** next to the report name.

Select **View versions**

Find the date of the report to be viewed. If only the latest date is showing, tick **Show all history** box to view all dates.

Choose  **Open the details panel**

The panel displays with full details of scheduled report, such as success of run, receipients, messages, run times. The **Formats** and **Prompt** values can be checked.