Purdue University | Business Intelligence Competency Center
INFORMATION TECHNOLOGY

Cognos Analytics Navigation

COG 101

Cognos Version 11.1.7

November 2020

Business Intelligence Competency Center

INFORMATION TECHNOLOGY AT PURDUE

Table of Contents

Consuming Reports

Consumers use IBM Cognos Analytics to run pre-written reports. You can subscribe, schedule, view, download, or print report output information based on the report logic. The results can be exported into these formats:

- Excel
- Excel data
- CSV (for mail merge or import into other systems)
- Adobe Acrobat (.pdf) for printing
- XML
- Web based HTML format for viewing

Data for Cognos reports usually comes from these sources.

Boiler Insight - Business Data		
Business and HR Data	**GM AIMS**	**Physical Facilities**
• The data in these reports comes from SAP. • Contains Human Resources (HR) and Financial (FI) data. • Data is typically one business day old, depending on the Star.	• The data in these reports comes from SAP. • Contains Human Resources (HR) and Financial (FI) data. • Data is typically one business day old, depending on the Star.	• The data in these reports comes from SAP. • Data is typically one day old.

Student Data	
Banner Operational Data Store (ODS)	**Banner Enterprise Data Warehouse (EDW)**
• Base data from the Banner systems. • Data is loaded into the ODS nightly. • Data is one day old.	• Base data from the Banner systems. • Transformed data from ODS for freeze files. • Data can come from multiple freeze dates.

Security

Keeping data safe and secure is now a part of Indiana law. Cognos is designed as a secure environment for viewing data. If data must be extracted, take proper precautions to secure it. **DO NOT save sensitive data on your PC (usually C: drive)**. **If you must save the output, be sure to save it to a LAN drive or other secured location.**

Review the link below for protection of data and for your own safety.

Data Classification & Handling

https://www.purdue.edu/securepurdue/data-handling/index.php

Accessing Cognos Analytics

- All users access Cognos by using **Purdue career login** and **BoilerKey**.
- Internet Explorer, Google Chrome, and Mozilla Firefox can be used with Cognos Analytics. Cognos is **not** supported with the use of **Edge**.
- The standard Cognos Maintenance window is **Saturdays** from **3:45PM to Midnight**. Additional outages will be communicated.

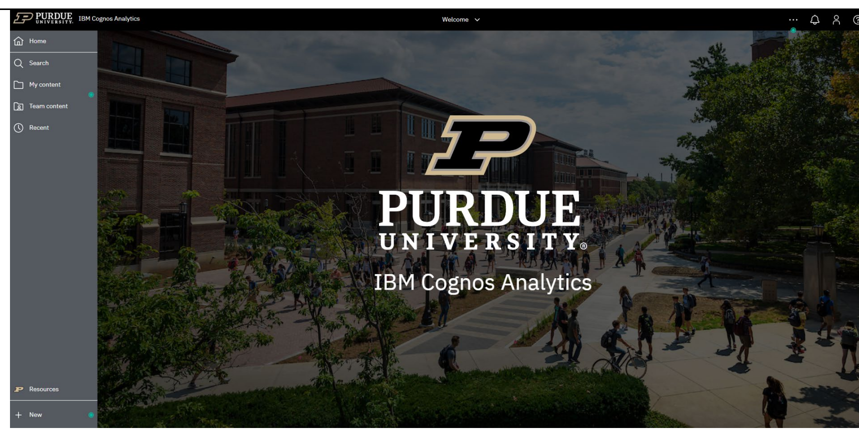
General Use URL (PROD)

The URL for Cognos is https://reporting.itap.purdue.edu
*(**NOTE:** For future use, you may want to add the URL to your **favorites**).*

Training URL

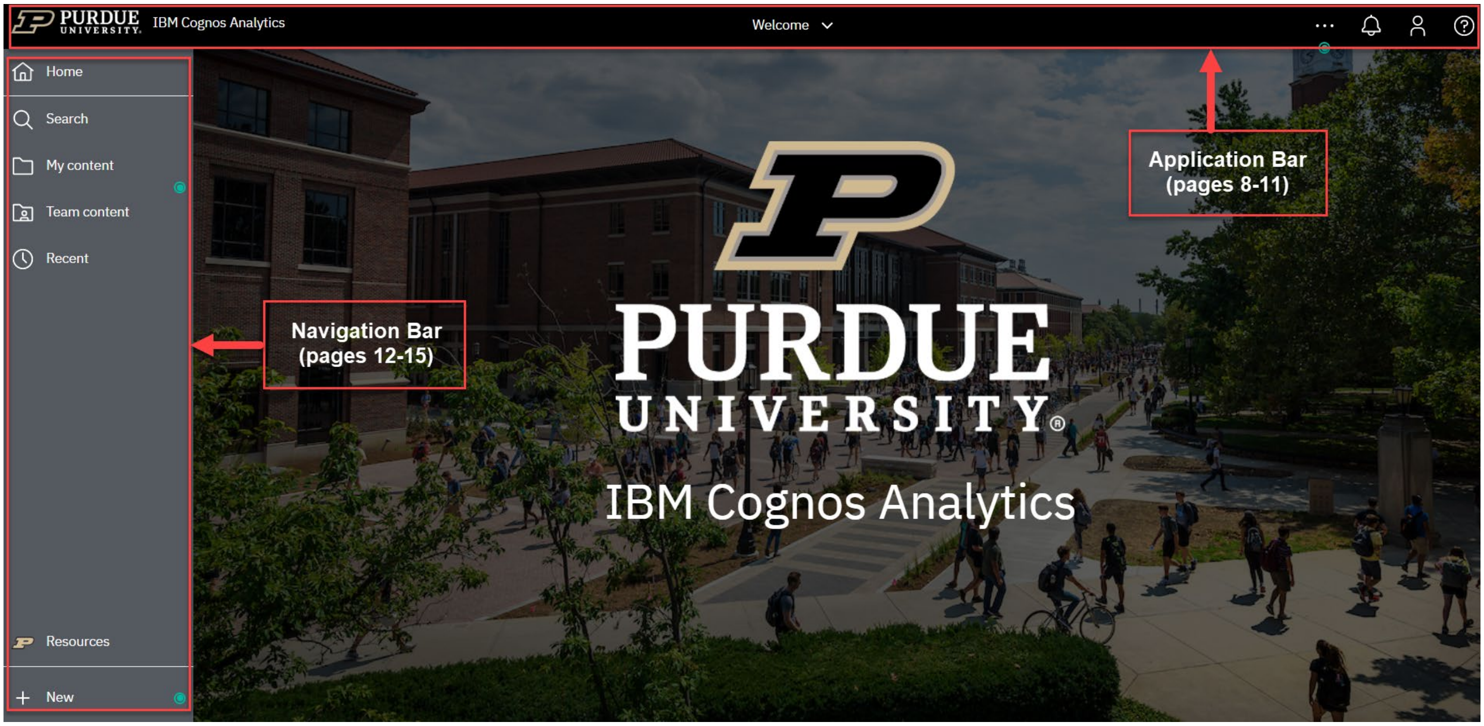
We will be using a test environment for training.

1. **Go** *to* **https://reportingqa.itap.purdue.edu**
2. **Enter** your network credentials. ***User ID:*** on the first line and ***BoilerKey:*** on the second.
3. **Click** the ***Sign in*** button or ***Enter*** to continue.

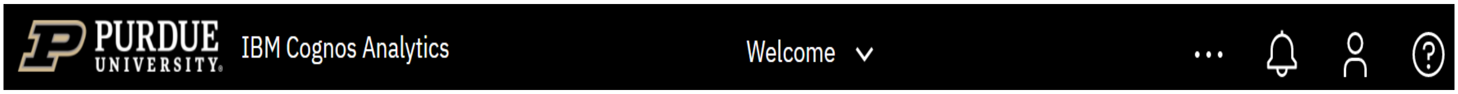
Log on Page Use Purdue Network ID and BoilerKey	Welcome Page
	

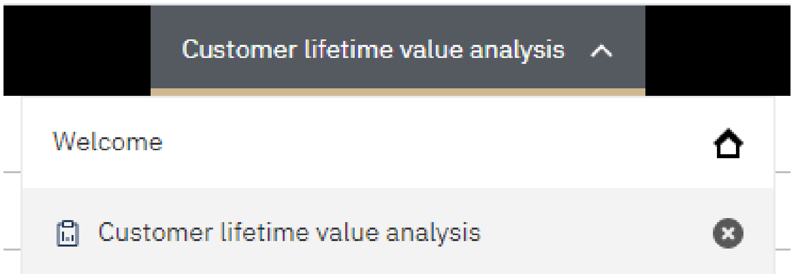
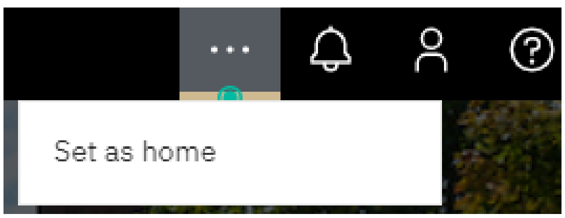
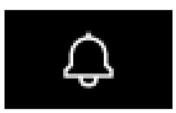
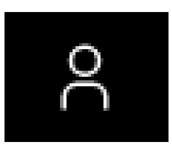
4. When authentication is complete, you will see the ***Welcome to IBM Cognos Analytics*** main page.

Main Portal Page Content



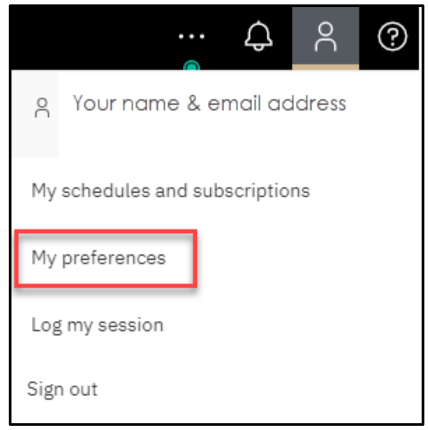
Application Bar



	**Welcome** • Toggle between main portal page and new or opened reports. • House icon indicates you are on the Home Page. • Click ⊗ to close objects in the window.
	**More** • Used to set report ***output*** as your home page (**not generally recommended**). (*Default is main portal page*) • Capabilities change depending where you are in navigation or authoring.
	**Notification Indicator** • Alerts user when subscribed reports have finished executing.
	**Personal Menu** • Settings related to you as the user. • Includes preference settings and schedule & subscription maintenance. • Used to sign out of Cognos.

Personal Menu

The personal menu is related to anything relating to you as a user. This includes your security settings and personal preference settings within the portal.



My Preferences

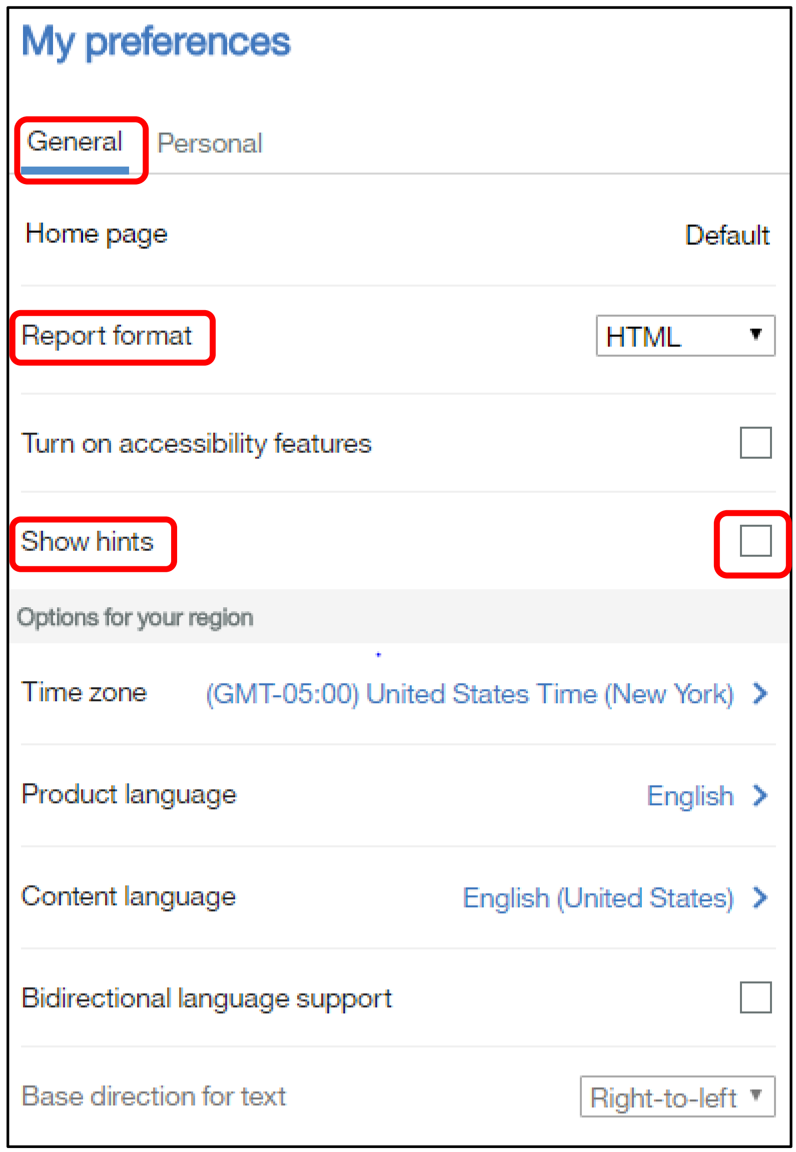
- *Click on the **Person Icon** located on the Application Bar and select My preferences.* 

- ***Report Format***: Users can change all reports to run in a preselected mode, *but this is not recommended*. Default is HTML.

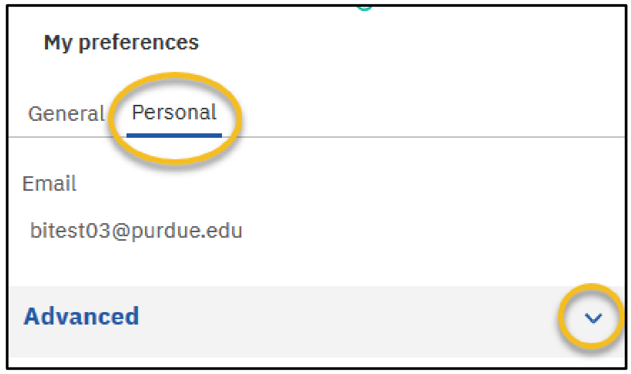
- ***Show hints:*** Users can turn hints  on or off on the main portal page and within the authoring tool.

  The current setting in this example is off, or unchecked.

Additional settings are not typically changed.



1. **Select** the ***Personal tab.***



- **Use** the ***down arrow*** across from ***Advanced*** to open additional options.

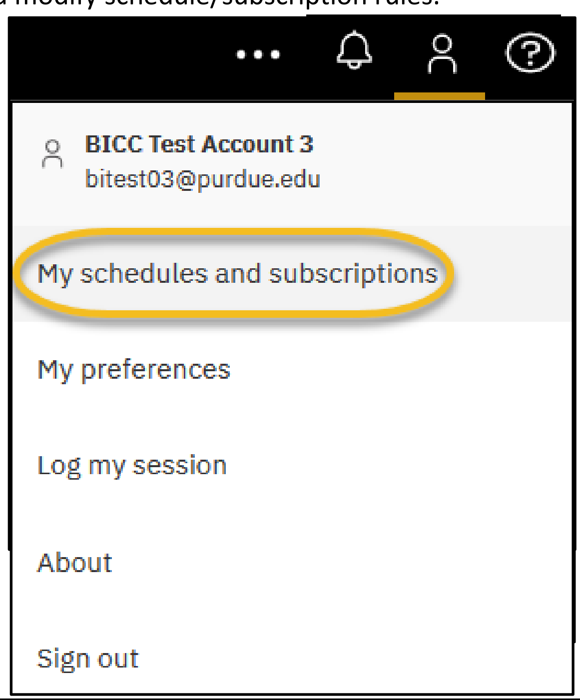
- ***Renew credentials*** after changing your password for Subscriptions and Schedules can be found here.

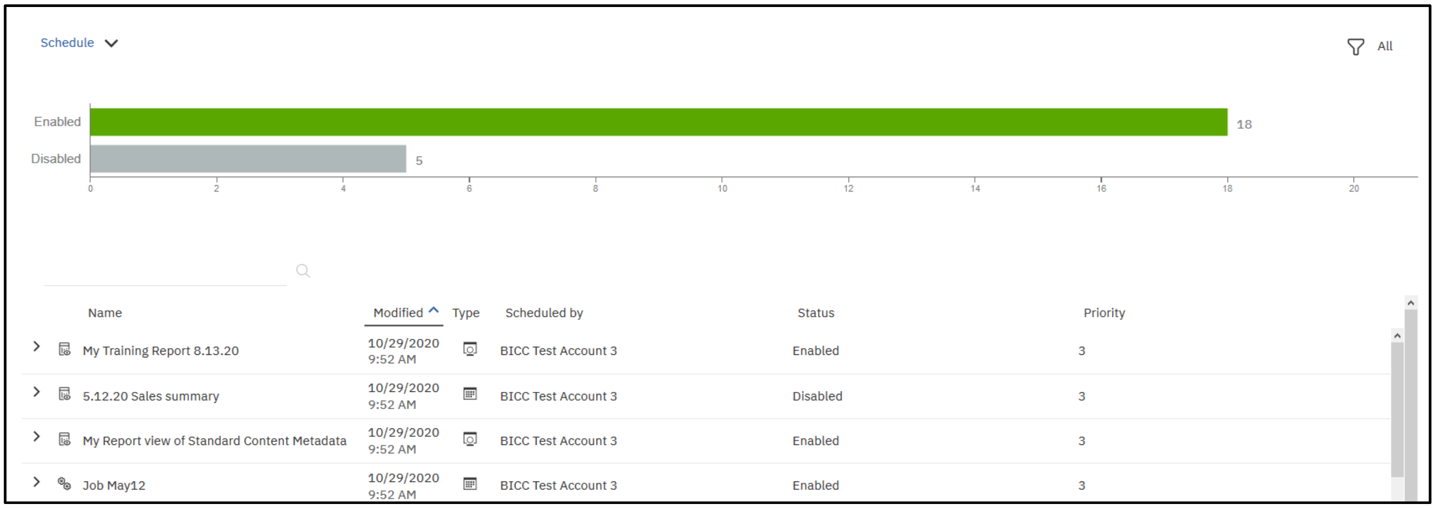
- **Click** ***Renew*** after password changes for ***Subscriptions*** and ***Schedules*** to continue running.

Additional settings under My preferences are not typically changed.

<u>My schedules and subscriptions</u>

Users can ***subscribe*** to a report they use often or on a regular basis. When you subscribe to a report, the subscription includes all your prompt and parameter values. ***My schedules and subscriptions*** displays user subscriptions as well as schedules. It can be used to research failed report schedules, delete schedules/subscriptions, and modify schedule/subscription rules.



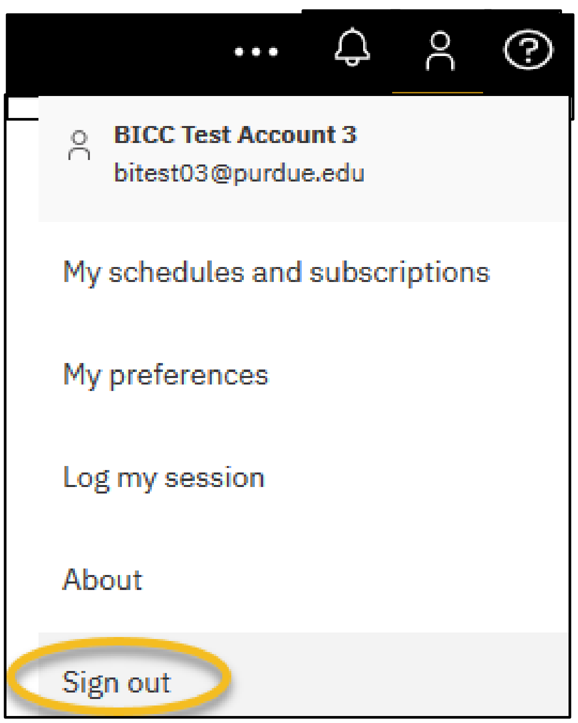


NOTE: More details and steps for creating ***subscriptions*** are found on page 29. ***Scheduling*** report runs is covered in the ***COG 111 training***.

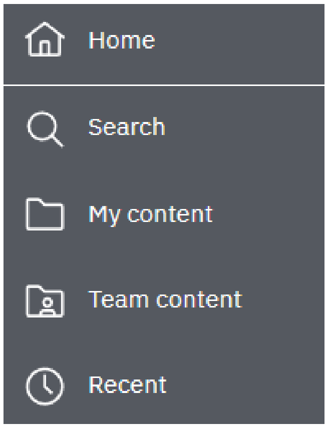
Sign Out

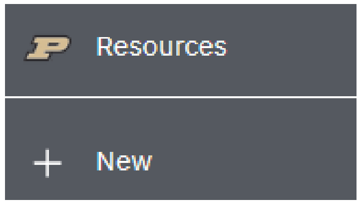
1. **Click *Sign Out*** to leave Cognos Analytics.

2. **Close** the browser.



Navigation Bar





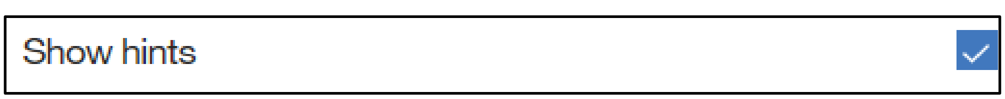
Note: Icon text descriptions only display if monitor size is wide enough. If you only see icons, hover over the icons objects to display descriptions.

	Search	Search for items by keywords and select Enter key. Searches can be saved
	My Content	My Content folders
	Team Content	Team Content folders
	Recent	Recently viewed report type objects and dashboards
	Resources	Click to find links to additional information on Cognos, Authoring, and other documentation related to reporting at Purdue University, (formerly Resources tab)
New	**New**	To create a new report, select the icon (authors only)

Hints Icon

The Hints icon appears beside suggested icons. Clicking on the green button will open an information box explaining what the icon can do for you.

- Each information box contains a ***Turn off hints*** link if you choose to not use the Hints icon.
- Users can also disable/enable the ***Show hints*** feature under ***My preferences/General tab***. ***(NOTE: ALL icon hints will be turned off).***



Navigating Cognos Analytics Folders and Objects

My Content	Team Content	Resources
• Formerly *My Folders* • Contains objects only viewable by the user • Users can copy reports from Team Content folders and save to My Content for personal use	• Formerly *Public Folders* • Contains standard reports and departmental folders and reports • Users view items based on security roles	• Added by Purdue BICC • Links to Cognos user documentation and QRC's (Quick Reference Cards) • *Authoring* resources • Links to Cognos training • Information for *HR/FI* and *Student* reporting links and documentation

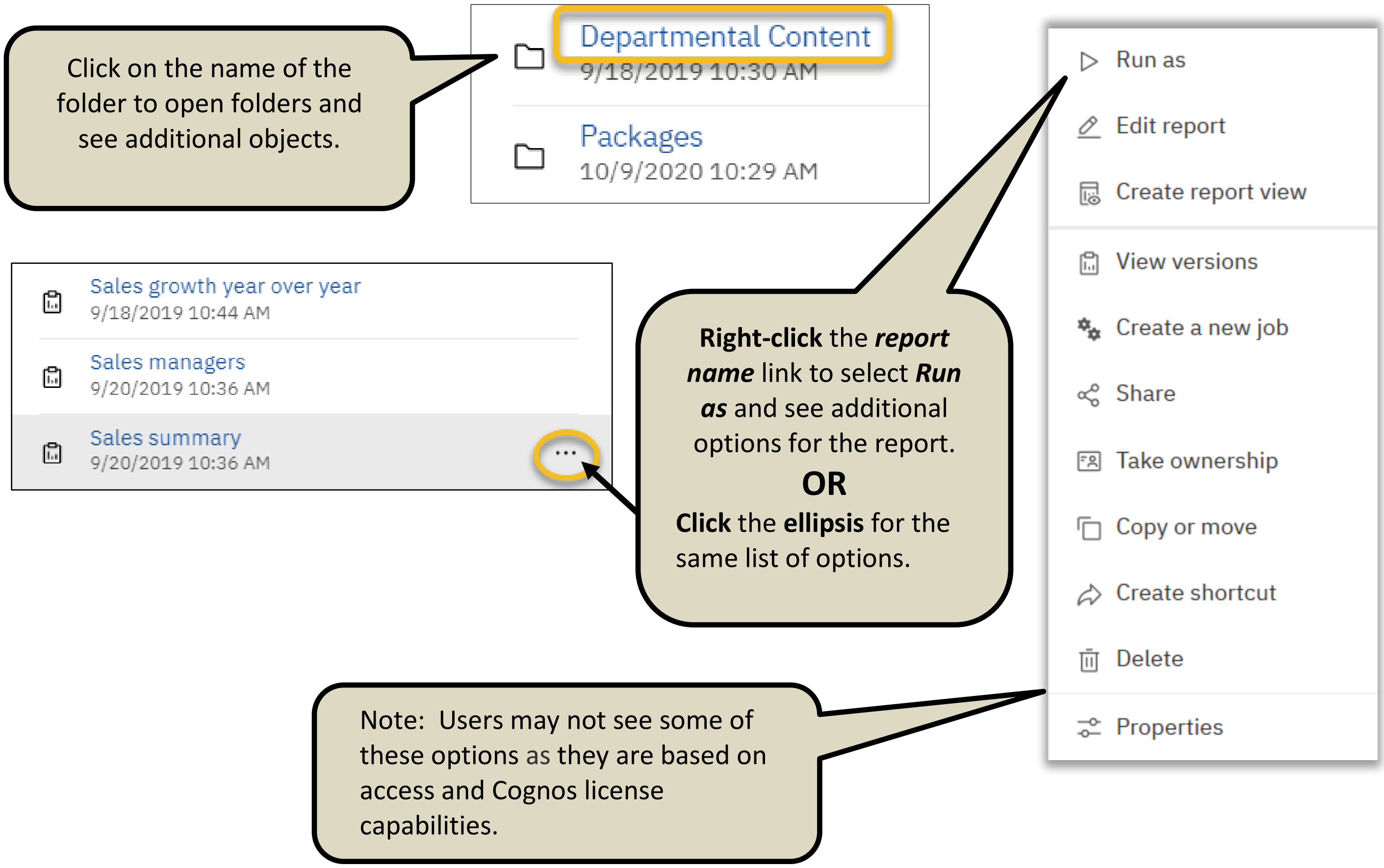
Icons in My Content and Team Content

Users can hover over items for a description.

Folder	Package	"Authoring" Report	"Query Studio" Report	Report View	Dashboard	Shortcut

Note: Users may or may not see some of these options as they are based on access and Cognos license capabilities.

- Click on **Team Content** to open a window pane.
- The first pane generally contains folder icons. Clicking a folder name will open anther pane.



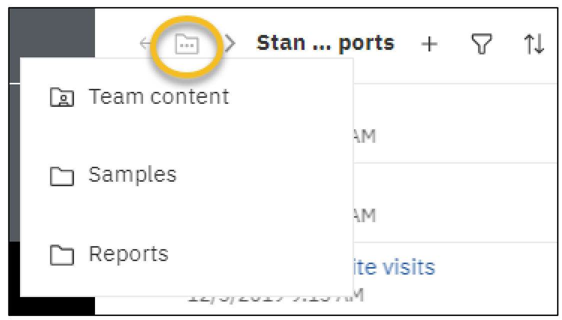
Breadcrumb Trail

The breadcrumb trail keeps track of where a user has been in clicking through the folder structure. In Cognos Analytics, as users click through the folders, the breadcrumb path collapses as more folders are selected. This makes it more difficult for a user to find their "way back home."

There are many options for users to work their way back or display their path.

1. **Navigate** to ***Team Content, Samples, Reports***, and **click** the ***Standard Reports*** folder.

2. **Click** on the ***folder icon*** located in the ***Breadcrumb trail*** to see the previous folders used to navigate to the current folder.

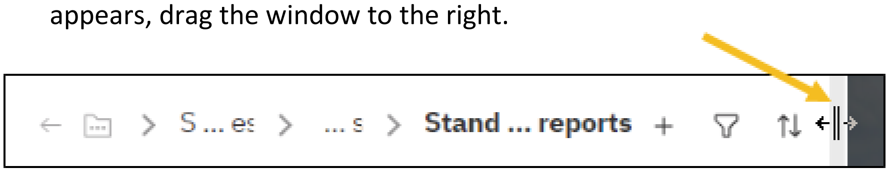


3. **Click** off the folder area and **click** on ***Team content*** in the ***Navigation*** pane to reopen the window pane.

4. Now **select** the ***back arrow***. This will take the user back one folder level with each click.

Users can also pull the menu to the right to view entire path.

5. Hover the curser over the right side of the box. When the double line and double arrow curser appears, drag the window to the right.

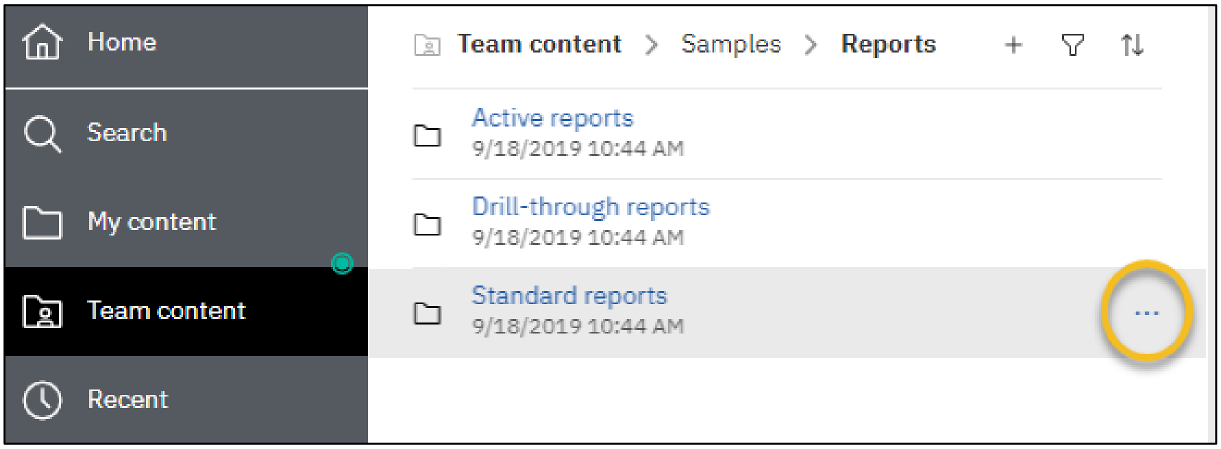


- Each time the ***Team Content*** is chosen from the ***Navigation Bar***, it will automatically return to this view until selecting ***Team Content*** from the ***Breadcrumb Trail*** and clearing the breadcrumb menu.

Folder Features

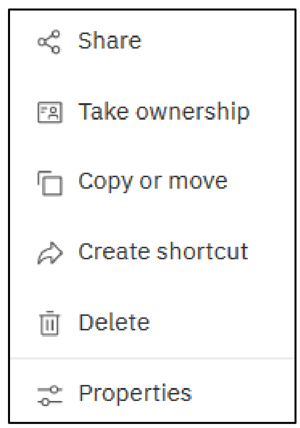
1. **Navigate** to ***Team Content, Samples, Reports***.

2. **Hover** over ***Standard Reports*** and **click** the ***ellipsis*** to the right of the name.



3. The options list for folders opens.

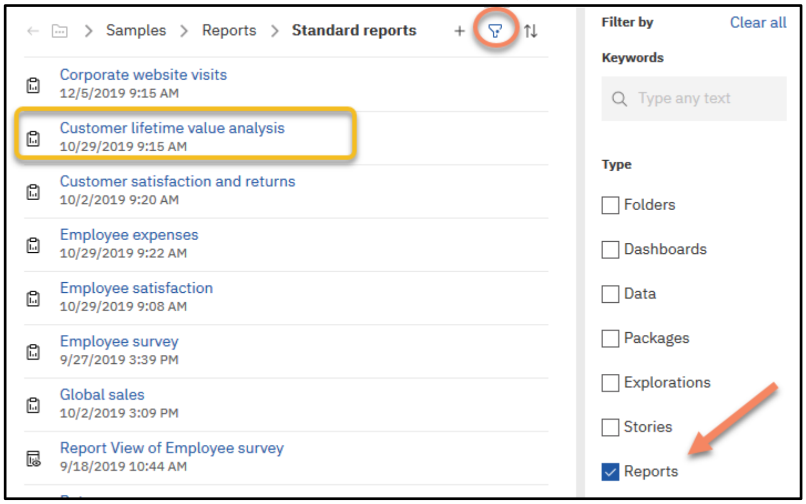
Note: Users may not see some of these options as they are based on access and Cognos license capabilities.



Share	Copy link to share content with other users.
Take ownership	Used to update logged in user to become folder owner.
Copy or move	Copy folder object to another destination in Cognos. Move option is based on user's access.
Create shortcut	Used to create a shortcut version of the folder.
Delete	Used to delete a folder, based on user access.
Properties	Displays folder owner, shows folder create and modify dates, and view a folder description if provided.

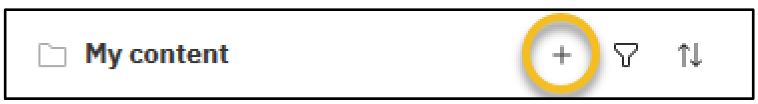
Filtering Folder Content

4. **Click** on the ***Funnel*** icon to open filtering options.



Default is set to "All Content". To only see reports that are contained in this folder, check "Reports". This will filter out all other objects except report objects.

5. Use the ***plus icon*** to the left of the ***filter funnel*** to create new folders. Available to all users in the ***My Content*** folder. ***(Note: Some users will see it in Team Content as it is based on folder security).***



6 **Right-click** on ***Customer lifetime value analysis*** report <u>OR</u> **click** the ***ellipsis*** to the right of the report name. Notice the row is highlighted and an options menu appears.

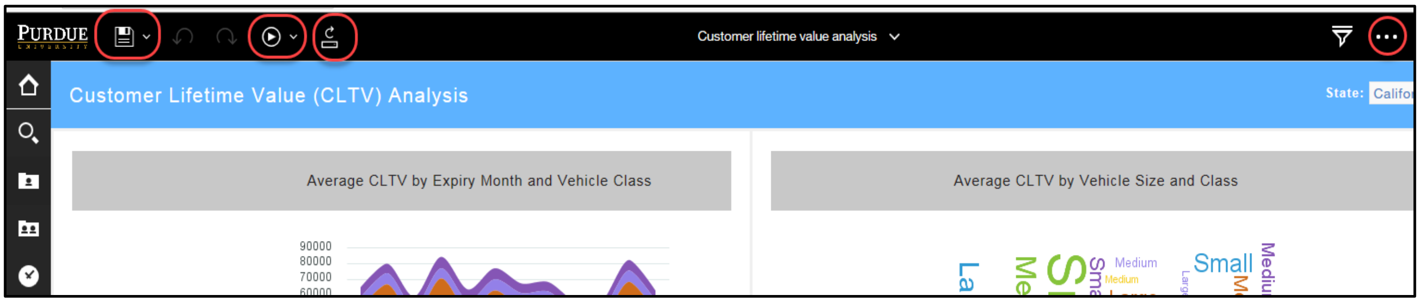
Run as	Allows selection of report output type and Run in background mode
Edit report	Opens report in authoring tool for edits and changes
Create report view	Creates a report view, usually used to create a copy for scheduling
View versions	Displays any previously saved report output and previous run history
Create a new job	A collection of reports. A job allows a user to set the same schedule for multiple reports, report views, and other jobs.
Share	Copy link to share content with other users
Take ownership	Used to update logged in user to become report owner
Copy or move	Copy report object to another destination in Cognos. Must have write access to selected destination.
Create shortcut	Used to create a shortcut version of the report. *Not generally recommended.*
Delete	Used to delete the report object
Properties	Displays report owner, relevant dates, report description and other options based on user access

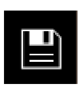
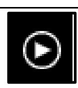
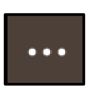
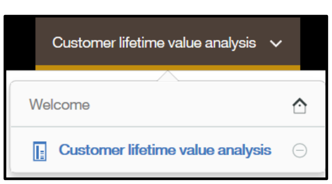
Note: Users may not see all of these options as they are based on access and Cognos license capabilities.

Running Reports

1. **Select *Team content*, *Samples, Reports*** then ***Standard reports***.
2. **Right-click** the report link ***Customer lifetime value analysis,***
3. **Select *Run as,*** then **click *Run***.

The report will run and display output within the same window.
New options appear on the Application bar.



	**Save**	**Save as:** Save the open report to another folder within Cognos. **Save as report view:** Used to create a Report view version of the report for scheduling reports.
	**Run**	Users can select to rerun a report in a different output, rather than the current default setting. *(See page 20 of this manual)*
	**More**	The ***More*** options change ***when a report is open***. It allows a user to: • Set the current report output as their home page • Share the report by providing the url link to the report ***(Note: recipients of the link must have a Cognos license to open and view the report).*** • Embed the report into another document • Create a ***Subscription*** to the report
	**Welcome**	The ***Welcome*** icon changes to show what you currently have open. In this example ***Customer lifetime value analysis*** is the only other object currently open. • Click to view open windows, close windows, or toggle between open windows. • Click the  to close the object/report.

4. **Close** the ***Customer lifetime value analysis*** report window.

Report Output Format Options

This document provides information on the Cognos output options and behaviors when exporting Cognos reports.

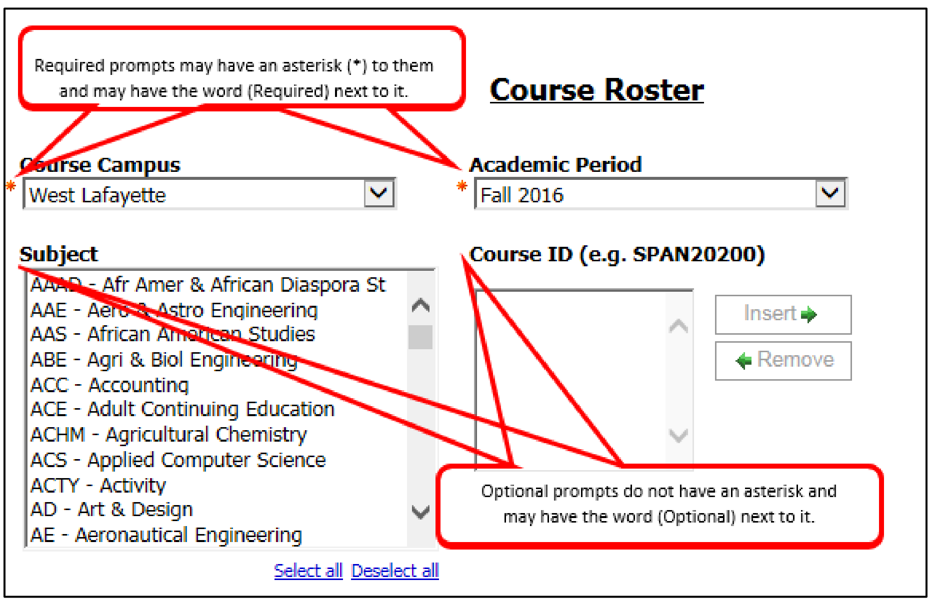
HTML	• This is a report's usual default. • Web based and designed for viewing report output on-screen. • If the report contains tabbed layouts, all pages will be displayed and accessible.
CSV	• Export data which is tab-delimited and can be imported to (or read by) other software. • Strings are not enclosed in quotation marks. • CSV exports show only the results of the report query. • Page layout items, such as titles, images, totals, and subtotals, etc., **do not appear.** • Only the first page of tabbed layouts will appear. • If the first page of the report contains more than one report object (list or crosstab), only the first object is displayed.
Excel	• Previously named Excel 2007 Format • Supports lists, crosstabs, icons, titles, subtotals, totals, and charts. • Preferable over Excel 2002. • Each page of a tabbed layout will render as its own worksheet in Excel. **NOTE: *Authoring* Users: If Rows per Page in the Report Page Properties is populated with a value, this Excel version will page break into separate worksheets based on the number of rows per page.**
Excel Data	• Report formatting (titles, charts, icons, subtotals, totals, etc.) are dropped and data is returned in spreadsheet format (like CSV file). • Only the first page of tabbed layouts will appear. • If the first page of the report contains more than one report object (list or crosstab), only the first object is displayed.
PDF	• Used for printing and distributing output in Adobe Acrobat Reader. • You must have administrator privileges to specify the advanced PDF options. • Each page in a tabbed layout report will render its own page. **NOTE: *Authoring* Users: To modify the PDF default settings for the report, open the *Authoring* tool and open the properties for Page, then PDF Page Setup.**
XML	• XML report outputs save the report data in a format that conforms to an internal schema, xmldata.xsd. • Is useful if you want to use a report as a data source for another report. • **NOTE:** For reports that have more than one query defined in the report, unless the additional queries are used for prompts, the following is true – if the report contains more than one data container, such as a crosstab and a list, and both containers use the same query, only the output for the list is produced. If the report contains multiple lists, only the output for the first list is produced. If the report contains multiple crosstabs and multiple lists, only the output for the first list is produced.

Prompts

Most reports will display a prompt page once you send the request. This helps make reports more versatile for more users. It also helps the report process to become faster by limiting the amount of data coming back from the database.

- Prompts can be single select or multi select.
- Prompts can be required or optional. A **red asterisk** * indicates this prompt is mandatory.
- **Finish** or **Submit** buttons are grayed out until a mandatory prompt is selected.
- Some prompts only allow you to choose one value.
- Use the **Ctrl** key and/or **Shift** key with the mouse to select multiple values within the prompt box.
- Some prompts have **Select all** and **De-select all** links below the prompt.
- All prompt pages contain a ***Cancel, Submit, Finish*** or ***OK*** button to cancel or execute the report.
- If prompts are optional and none are selected, the report may take longer to complete.

Not all prompt pages look the same. Report authors have the ability to create different designs and layouts based upon the best use for the data and report.



Drill Through Reports

Some reports may contain drill through links which allow users to see more details by opening a second report.

- **Drill Throughs can only be used when processing the report in HTML or PDF format**
- **This feature is not found on all reports**

1. **Navigate** to ***Team content***, ***Enterprise***, ***Standard Content, Metadata.***
2. **Click** ***Standard Content Metadata.***
3. On the prompt page**, select** ***FI*** in the ***Subject Area*** prompt**,** and ***Account Summary*** in the ***Title*** prompt.
4. **Click** ***Submit***.

Drill Through reports are indicated by the blue text color and underline which hyperlinks to a more detailed report. In this example, the hyperlinks are for the ***Account Summary*** report details.

5. **Click** the ***blue report link <u>Account Summary</u>*** to drill down into the data.

Subject Area: FI

Title	Executive Summary
Account Summary	Provides a listing of valid accounts with management balances and cash balances (for Unit Revenue Funds) including the details of the management balance formula (Carryforward, Revenue, Expense, Transfers and Commitments). In addition this report also has a drill thru to the Statement of Financial

A new browser window opens for the drill through (child) report. The report displays detail about the report including calculations, prompts and filters.

PURDUE UNIVERSITY

Content Metadata

Report Name: Content Metadata Drill Through
Run Date: Jul 7, 2017
Run Time: 2:37:38 PM

Title: Account Summary

Calculations	Prompts	Fixed Filters	Intended Audience
Management Balance = ([Carryforward] - ([MTD Revenue] + [MTD Expenses] + [MTD Transfers] + [MTD Commitments]))	Required: Fiscal Year; Fiscal Year Period; Optional: Fund, Fund Subtype; Fund Type; Funds Center; Department; Major Area; System Level 3; System Level 2; System Level 1	MTD Transfer: case when [Financial Balances Star].[Commitment Item].[Category 1] in ('Transfers') then [Financial Balances Star].[Financial Balances Fact].[MTD Revenue]+[Financial Balances Star].[Financial Balances Fact].[MTD Expenses] else 0 end Carryforward: [Financial Balances Star].[Financial Balances Fact].[Conversion Balance]-[Financial Balances Star].[Financial Balances Fact].[MTD Revenue] -[Financial Balances Star].[Financial Balances Fact].[MTD Expenses]	Business Management

6. **Close** the **browser** tab to return to the original report, ***Account Summary*** output.
7. **Close** the report using the **Switcher** drop down.

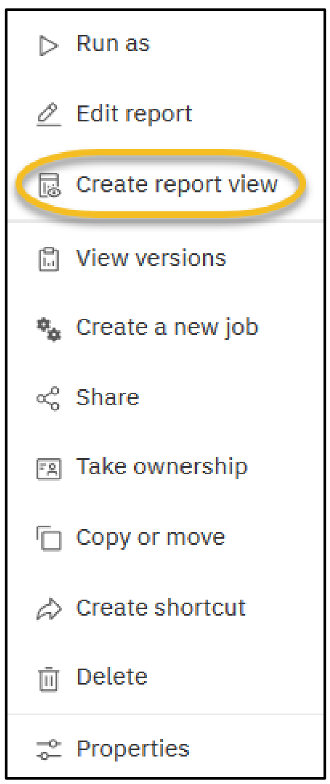
Creating Report Views

Report content, created by report authors and stored in available folders, may be saved as report views in your own **My content** or **departmental folders**. This allows you to save your favorite reports in a location that is easily accessible.

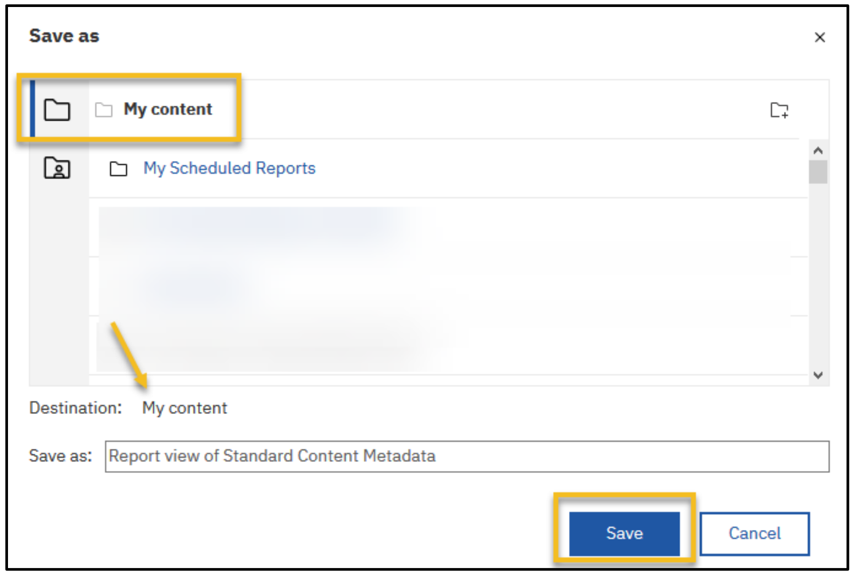
NOTE: The steps below would be used to create a Report View for scheduled reports or general use of the report to save selected prompts.

- Report views are a combination of a shortcut and a dynamic copy of the original report.
- If the source report is moved to another location, the report view link is not broken.
- If the source report is deleted, the report view link to the source report is removed and the report view will have to be re-created.

1. **Navigate** to ***Team content, Enterprise, Standard Content, Metadata, and Standard Content Metadata.***
2. **Right-click** on the report name and select ***Create report view***.



3. Select ***My content*** and then ***Save***.

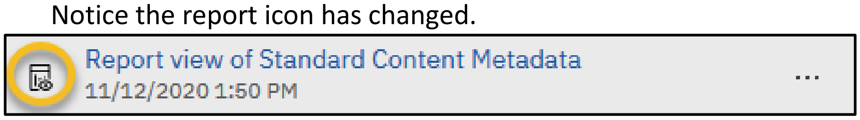


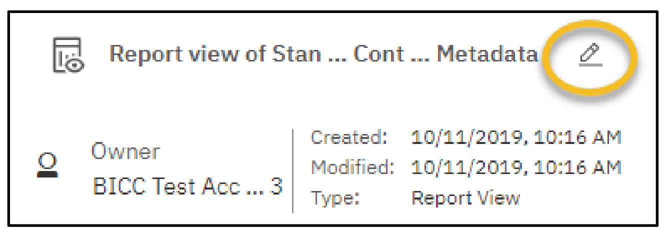
Notice the report name has been changed to ***Report view of Standard Content Metadata***. Cognos defaults the original name of the report and adds **Report view of** at the beginning.

> *NOTE: Users will only be able to save the report in their **My content** folder or departmental folder in **Team content**.* In this example we saved it to ***My content***.

5. **Close** the original report.
6. Navigate to your My content to find the new Report view just saved. The report will alphabetize within the list.

   Notice the report icon has changed.





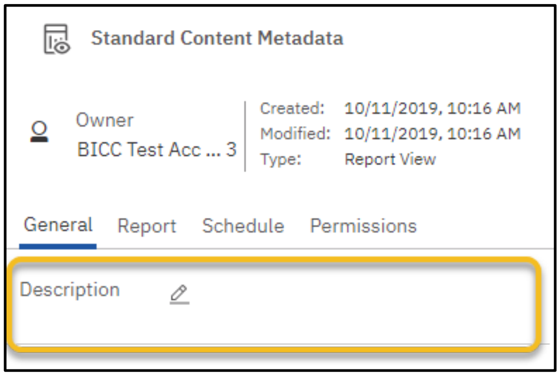
7. **Right-click** on the report name, or **hover and click** the ***ellipsis.***
8. **Click *Properties*** then **hover** to the right of the report name.
9. **Click** the ***Edit Pencil*** that appears.
10. **Click inside** the ***Report name block*** and **remove** ***Report View of*** from the title. ***NOTE: This step is optional. Users may wish to keep the reference in the title).***

> - *It is highly recommended you create a subfolder in **My content** titled "Schedules" and save the report view in it if you plan to use the report view as a scheduled report.*
> - *If the scheduled report is to be used by others in your department, create a "Schedules" folder in your departmental folder and store the report view there.*

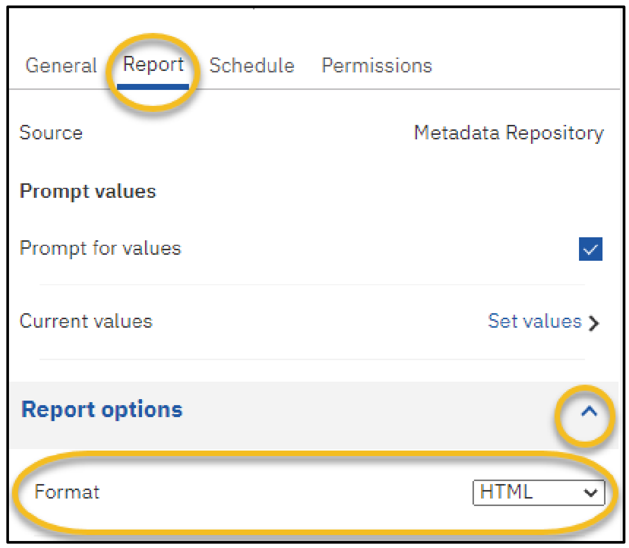
Report View Options

1. Using the new ***Report View*** just created, **Right-click** on the report name and **select *Properties*** from the list of options.

2. **Hover** over ***Description*** and **click** the ***pencil*** to add or modify the description.



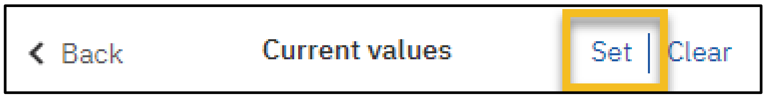
3. **Select *Report*** on the ***menu***.
4. **Use** the ***drop down arrow*** next to ***Report options*** to change the format to ***HTML***.



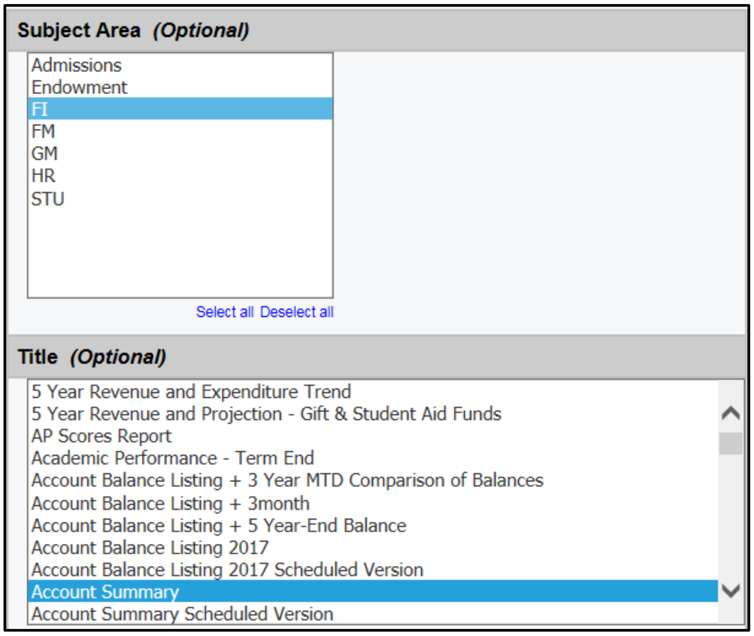
5. Make sure the ***Prompt for values*** box is checked.
6. Under ***Current values*, select *Set values*** or whatever text is displayed.

7. When the pane changes, **select *Set or Edit,*** whichever is shown.

   Select *Clear* if you want to clear all previously selected values.

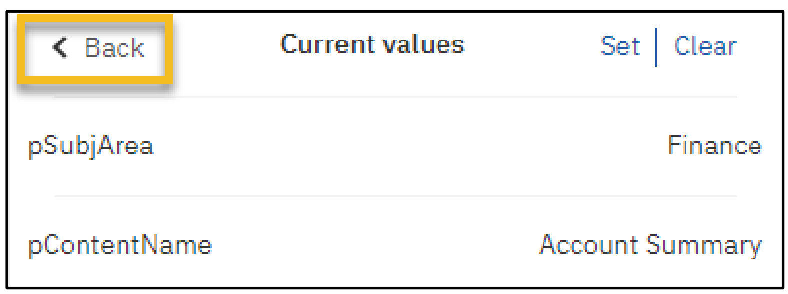


8. When the prompt page opens, **select** the following options:



9. **Click** the ***Submit*** button on the top or bottom of the prompt page.

   The prompt values selected will appear on the right side. Prompt names appear on the left.



10. **Click *Back*** option to return to the ***Report View Options*** pane.

Current selections are counted and displayed.

11. **Click** on the ***Advanced*** option to see additional settings.

12. **Scroll** to the top and **select** ***Schedule*** from the menu if you wish to create scheduled output. ***(Note: Scheduling report runs is covered in the COG 111 training).***

The ***Permissions*** option is rarely used as it is tied to security. It's generally only used by Cognos Administrators or selected Cognos department managers.

View and Manage Saved Report Output

Users may view saved report output and manage previous saved output versions.

1. Navigate to ***Team content, Samples, Reports, Standard Reports,*** then ***Customer lifetime value analysis*** report.
2. **Click** the ***ellipsis*** to open report options**.**

3. **Select *View versions*** in the options pane that opens.

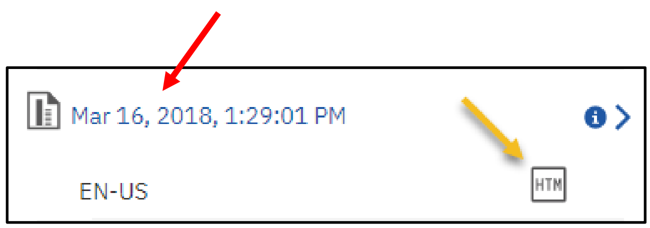
(NOTE: User must have access to the report).

4. **Click** the ***Show all history*** box to see the entire list of saved output.

A list will appear. Two types of content are stored here, ***Saved Report Output Versions*** and ***Run History***.

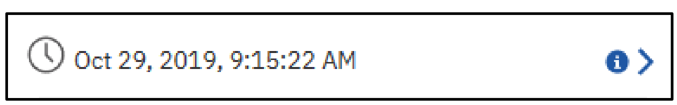
Saved Report Output

- Saved report output will appear as a link and if clicked, will open saved output options.
- Click the attachment to open the saved report output in the format indicated.
- Saved output can be deleted by selecting ***Delete report version.***



Cognos will default only 1 saved output file at a time.
Only the most recent output will have the saved report output available.
(Default settings can be changed in the Report Properties section of the report).

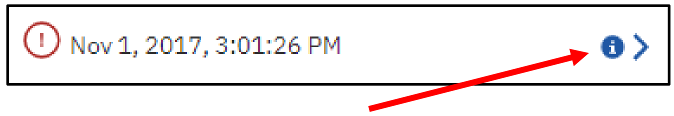
Run History



- A saved output run history appears in blue or red text and will also generate a record of the report run.

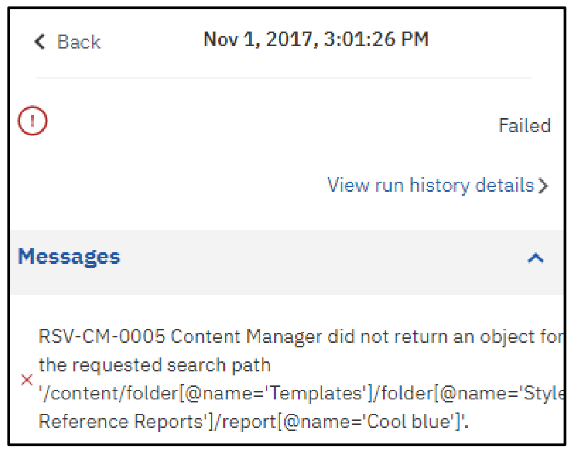
Cognos will default 5 report run records before deleting the first one. Users cannot delete these records. (Default settings can be changed in the Report Properties section of the report).

In this example, notice the red exclamation icon. This indicates the report failed to run.



Click on the blue arrow across from the report to see the fail message.

5. **Close** the open report.



Creating Subscriptions

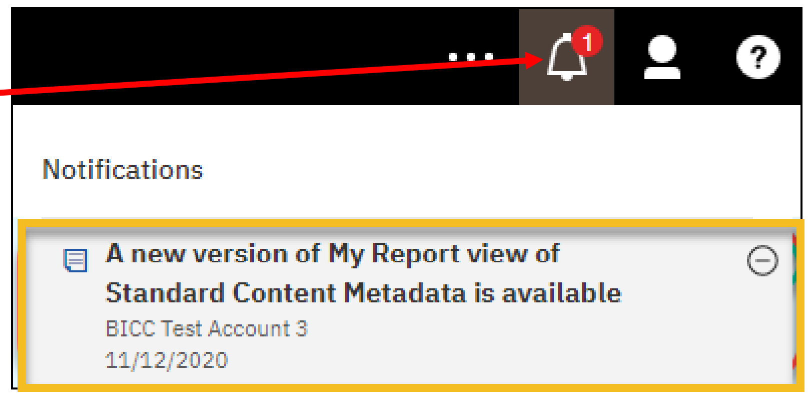
- If you use a report on a regular basis, you can set up a subscription to be delivered to you on a preset schedule. You can pick the time, date, format, and output types and how you want it delivered.

- ***The subscription set up option is available ONLY when you run and view report output, but not when you are in editing mode or when you view saved output.*** If you edit a report, you must save it before you can subscribe.

- After you subscribe, each time your report is delivered, you are notified via a Notification indicator on the Application Bar.

Click on icon to see the message.

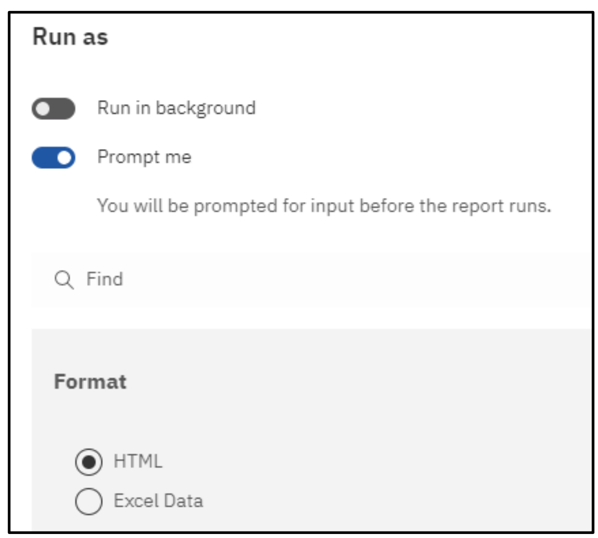
Hover and click the icon to delete the message.



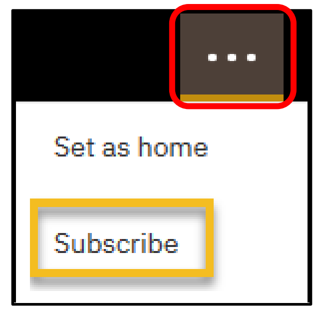
- **SUBSCRIPTIONS CANNOT BE USED FOR DISTRIBUTING REPORTS TO OTHER USERS. The *Scheduler* feature must be used for multiple email distributions. Scheduling is covered in the COG 111 training.**

1. **Go to *Team Content, Enterprise, Standard Content, Metadata, and Standard Content Metadata.***
2. **Right-click** on the report and select ***Run As.***
3. Make sure ***HTML*** is selected then **click *Run*** at the bottom of the pane.

(NOTE: This step must be done to avoid using any previously saved output for this report)



4. Select the prompts you would like.
5. Once the output generates, **select** the ***More*** icon and **click** ***Subscribe***.



The subscription options pane opens with personalized options for how and when to run the report.

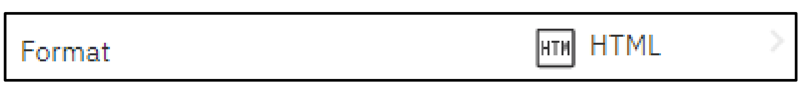
6. **Select** one or more days for the report to run. Select M, T, W, T, F, making sure the M, T, W, T, F are **Bold**.

- Day(s) that are in bold will generate a report.
- Defaults to current day.

7. **Click** on the ***Time*** box to open up time and AM/PM selection. Adjust how you would like.

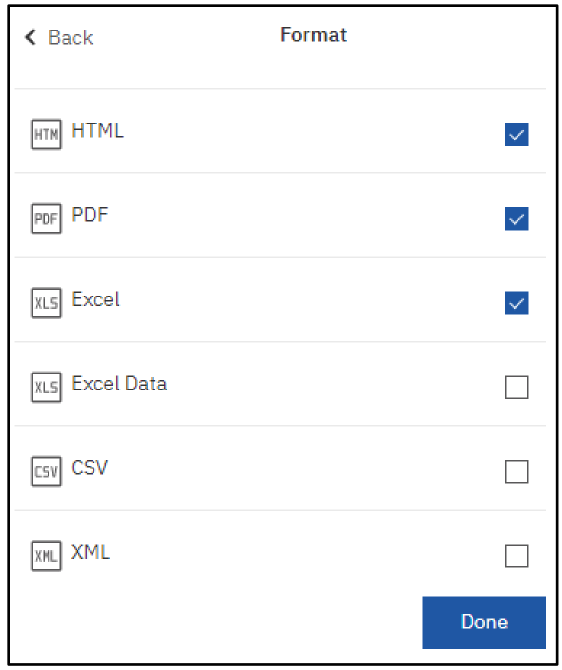
- Time the report will run for selected day(s).
- Defaults to current time.

8. **Click** the ***arrow*** on the ***Format*** line to select output format(s).

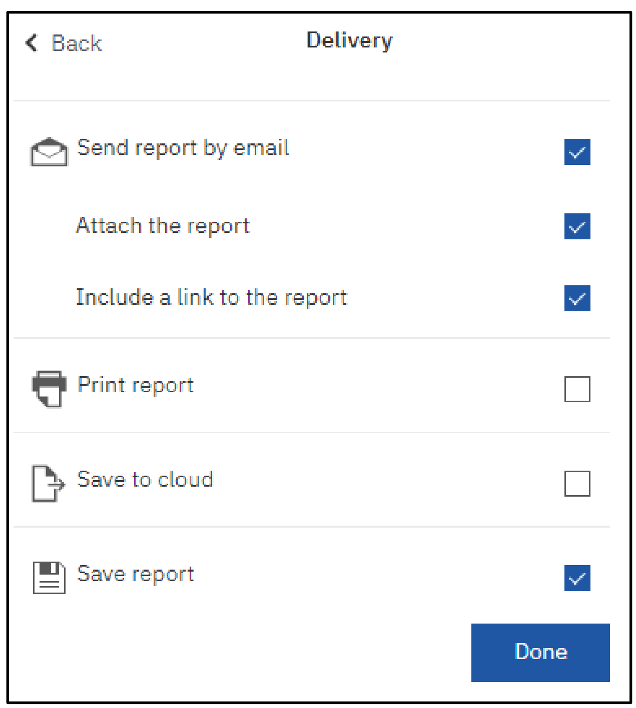


- Multiple selection is available.
- Defaults is HTML.

9. **Select** ***PDF***, ***Excel***, and leave ***HTML*** checked.
10. **Click** ***Done***.



11. **Select** the arrow on the ***Delivery*** line to set delivery options.



12. **Click** ***Send report by Email***.

13. **Select** ***Attach the report*** if desired and leave ***Include a link*** checked.

14. Make sure ***Save report*** is checked.

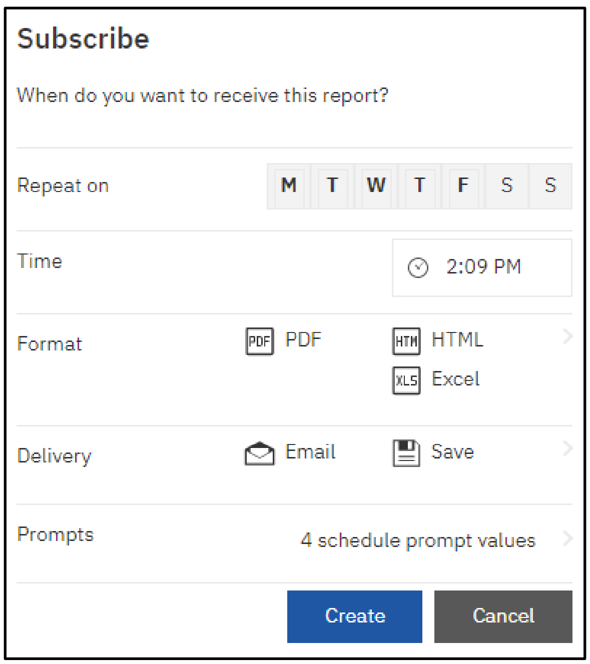
(NOTE: DO NOT select Print report. This feature is not available).

15. **Select** ***Done***.

16. Prompts are not accessible to change at this level. Display indicates how many prompts are available on the report.

- The subscription saves the prompts from the initial run.
- **Users are not given an option to change the prompts until after the subscription has been created.** Users must open their ***My schedules and subscriptions*** on the Personal Menu tab to change the subscriptions (which was discussed on page 10 of this manual).
    - ***My Schedules and Subscriptions*** is also the section to go to for other changes, maintenance, and deletions for your subscriptions.
- Cognos will save the selected values unless you change them.

Your new Subscription should look similar this.

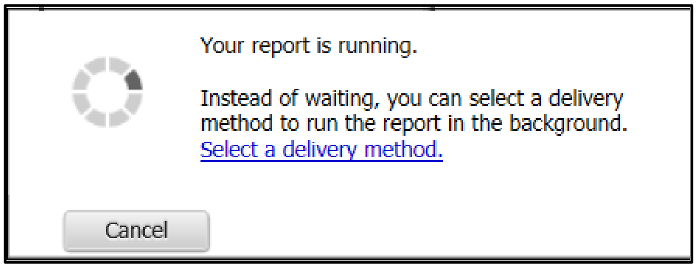


17. **Select** the ***Create*** button to create the new Subscription. You will receive a message at the top of the page that the Subscription was submitted successfully.

18. **Close** the report.

Server Response Considerations

When a report is initiated, the server generates the final report. Depending upon the amount of data being returned and the design of the layout, some response times are longer than others. While the server is gathering the necessary data, this message appears:

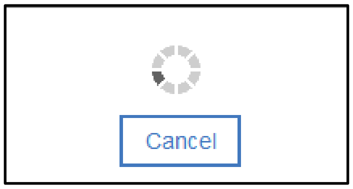


- When the server has gathered all of the requested data, the report will appear in the window in the format you requested (PDF, HTML, etc.).

If you need to cancel a report run:

- ***Do not close your browser (Internet Explorer, Chrome, etc.) without letting the report complete OR cancelling it.*** If you neglect to do one of these actions, the server continues to gather data.

- If you need to cancel the report, use the Cancel button displayed when the report is running. This will properly stop the data gathering and clear the server.



<u>Best Practice for Email Report Output</u>

If using the email options for report distribution, please consider the following:

- report content (FERPA, HIPPA or other security restrictions)
- output type and size selected (Excel, PDF, HTML, etc.)
- report recipients access to Cognos

1. **The intended user(s) have a Cognos license <u>and</u> the report contains sensitive or restricted information**

<table>
<tr><th colspan="2"><u>Suggested use for all users with a Cognos license</u></th></tr>
<tr><td rowspan="3">Include a link to the report</td><td>Use this option if you need the report to stay within Cognos for security reasons. Recipients receive the link and log into Cognos to review the output. Recipients must have access to Cognos to use this feature.</td></tr>
<tr><td>All output types can be used.</td></tr>
<tr><td>This is the most secure option for report delivery.</td></tr>
</table>

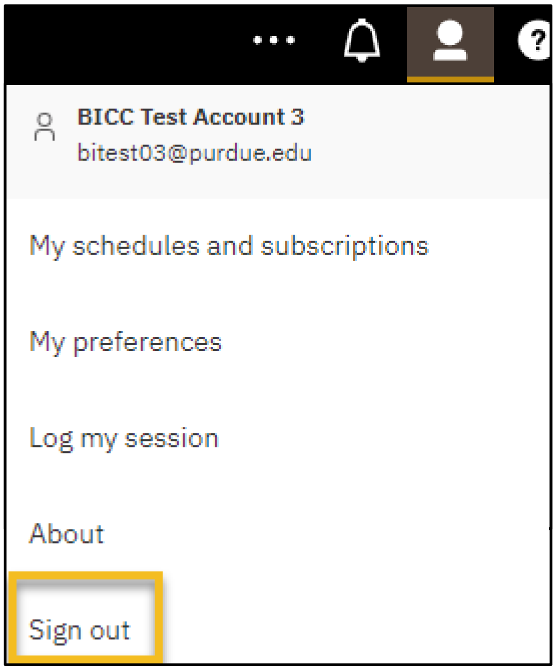
2. **The report does not contain sensitive or restricted information <u>and</u> the user does not have a Cognos license.**

<table>
<tr><th colspan="2"><u>Only use when data does not contain sensitive information</u></th></tr>
<tr><td rowspan="3">Attach the report</td><td>Use this if you want the output as an email attachment.</td></tr>
<tr><td>All output types can be attached. Cognos stores all types.</td></tr>
<tr><td>This option is less secure. Consider any sensitive report output before using this feature.</td></tr>
</table>

Logging Off

1. **Click** the ***Personal Menu*** and ***Sign out*** to log out of Cognos Analytics.

2. **Close** the browser to end the session.



Troubleshooting

Users may contact Kelsie Newberry (knewber@purdue.edu) or Katie Hendryx (khendryx@purdue.edu) with questions specific to this manual.

Please contact the BICC at bicc@purdue.edu for any Cognos questions or issues.

Feedback on this Document

Questions and feedback specific to this document are welcomed. Please email your comments to bicc@purdue.edu.

APPENDIX A – Run Report in Background – If you HAVE WRITE access to the folder where the report is housed

Users have the ability to run reports in the background. This allows Cognos to process the reports and send the user an email when the report has completed. It generally shortens the runtime and allows the users to work on other things instead of waiting for the report to render on their desktop.

Rules for using this feature:

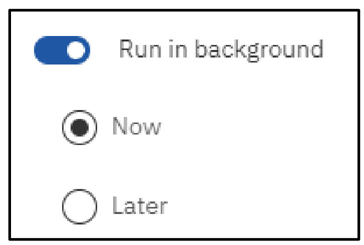
- The user must have ***write*** access to the folder where the report is saved, commonly - My content or departmental folders.
- Users can include other recipients in the email.
- Using report links (default) is the optimal use for security purposes. Consider report content before using the ***Attach the report*** output option.

Creating a Background Run Option

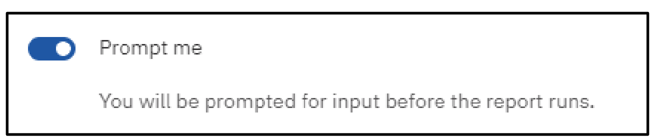
1. Navigate to a report within a folder you have write access to save objects.
2. **Right-click** on the report and **Select *Run as***.
3. Select ***Run in background***
4. **Click** on the white circle in the ***gray cylinder***.

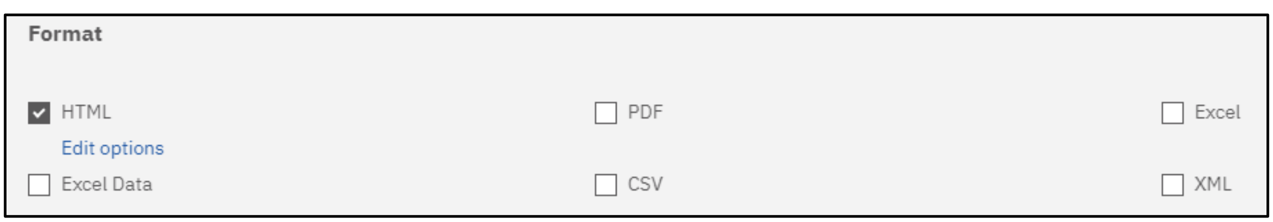
As ***Run in background*** is selected, the gray cylinder turns blue.

Selecting *Later* will open an option for date and one for time to set a future run.



5. For this exercise, **select *Now***, then
6. Ensure ***Prompt me*** is checked.
7. ***Select*** report output formats as desired (HTML, PDF, Excel, Excel Data, CSV, XML)

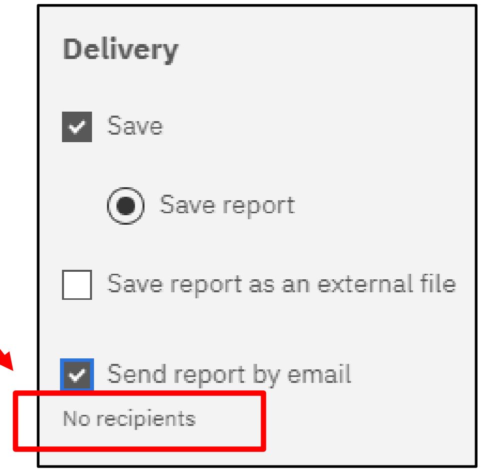




8. Scroll down to the **Delivery section.**
9. **Click *Send the report by email.***

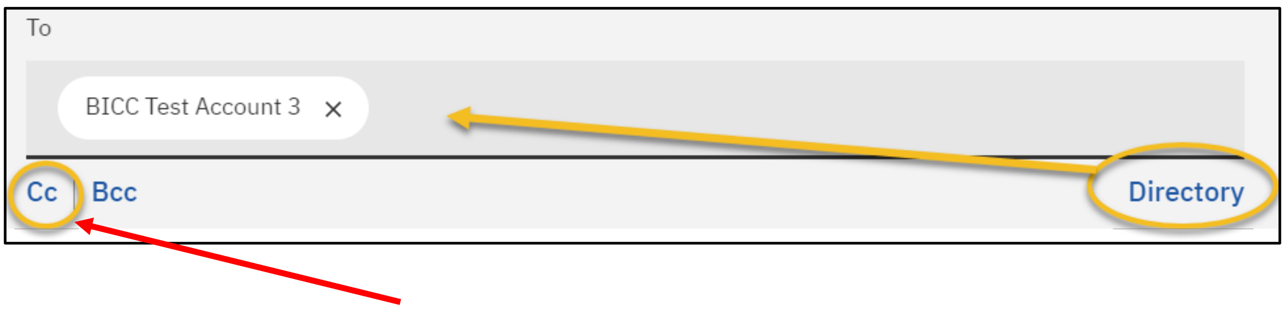
CAUTION Notice there are currently No recipients.

10. **Click *Edit details*** to the right



11. As you can see, your email automatically appears in the **To:** block.

** To add other recipients within Purdue University, you must use the ***Directory*** to the **right** of your **ID.**



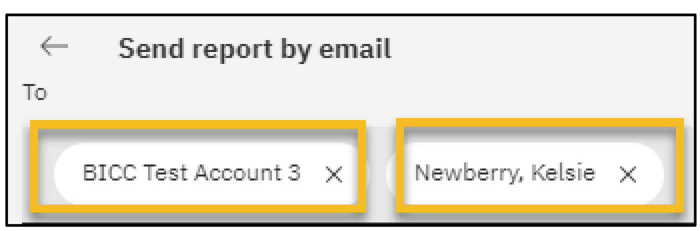
12. Or begin typing another user's **FULL PURDUE EMAIL** address in the Cc line ***Note***: ***User emails must be used here. Be sure to look them up before adding them to the list.***

13. To use the ***Directory***, Select ***BoilerAD*** and search for the recipient(s) ***username***. Then hit ***Enter.***

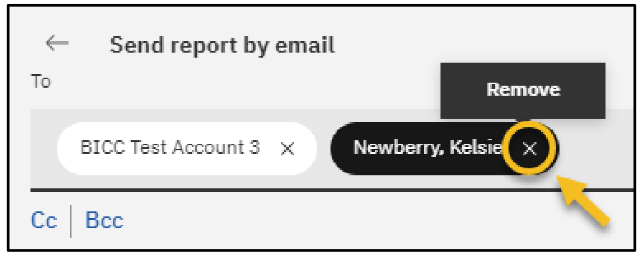
14. Select the recipient(s) then click ***Add.***

15. After you receive your confirmation message, click ***Close*** to get back to the **Delivery section**.

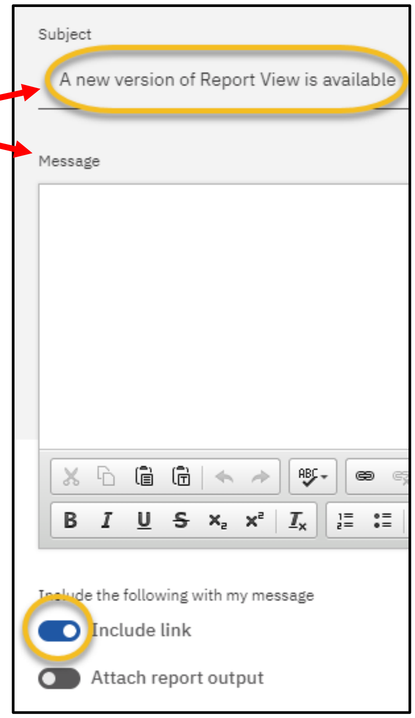
16. Notice there are now **two** recipients.



Click the  to remove users from the **To:** block.



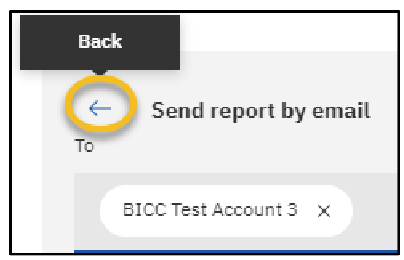
17. You can edit the **Subject** line as well as add a **message** to the email, if desired.



18. Scroll down and select ***Attach the report*** if you want the version included as an attachment to the email.

- **(*Please consider report content and security when using this feature).*** For this example, we are going to leave this box **unchecked.**
- Including a link is the most secure delivery option. Leave this box checked. ***Recipients must have a Cognos license to open the link in the email.***

19. Click on the ***arrow*** to get back to the **Run as** screen.

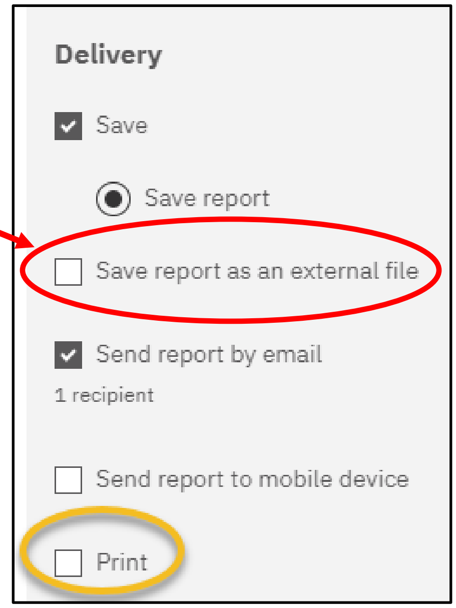


CAUTION

Users may see the Print report option checked. It **MUST** be **<u>unchecked</u>** for the report to run! **Confirm the *Print report* <u>is not</u> checked** (not a working feature).

CAUTION

<u>DO NOT CHECK</u> ***Save report as an external file*** as this requires a special set up. You must have made previous arrangements for this delivery type with the BICC.



20. **Click *RUN*** to return to the ***Run as*** form.

21. ***Select*** your prompts
22. Then select the ***Finish*** or ***Submit*** button.

APPENDIX B – Run Report in Background – If you do NOT have WRITE access to the folder where the report is housed

Users have the ability to run reports in the background. This allows Cognos to process the reports and send the user an email when the report has completed. It generally shortens the runtime and allows the users to work on other things instead of waiting for the report to render on their desktop.

Rules for using this feature:

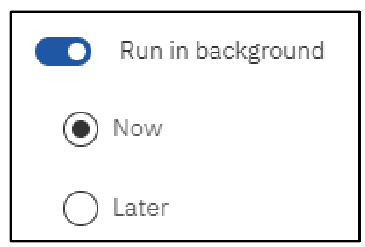
- Users do not have ***write*** access to the folder where the report is saved, commonly Standard Report folders, reports **not in** My content or departmental folders.
- Users can include other recipients in the email.
- Using can only use ***Attach the report*** output option. Consider the report content before using this feature.

Creating a Background Run Option

1. Navigate to a report within a folder you have write access to save objects.
2. **Right-click** on the report and **Select *Run as***.
3. Select ***Run in background***

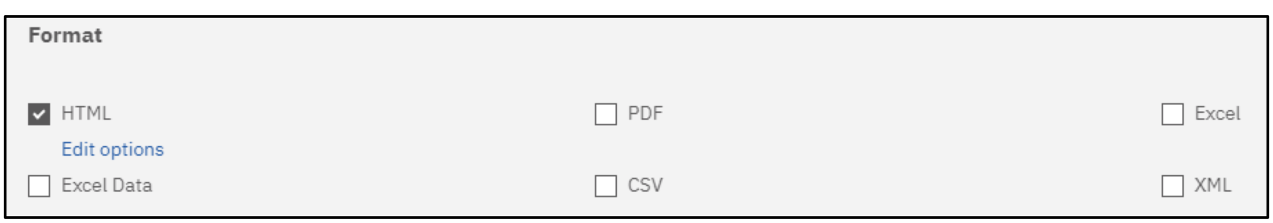
4. **Click** on the white circle in the ***gray cylinder***.

As ***Run in background*** is selected, the gray cylinder turns blue.



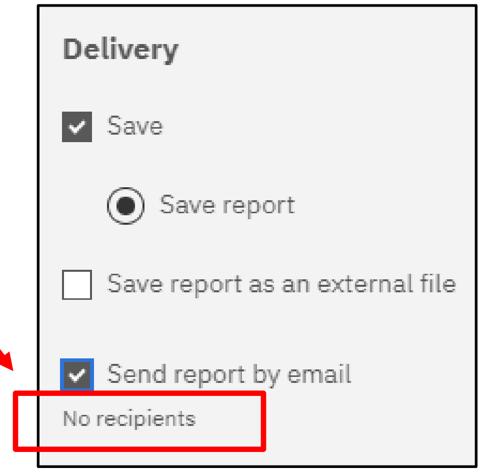
Selecting *Later* will open an option for date and one for time to set a future run.

5. For this exercise, **select *Now***, then
6. Ensure ***Prompt me*** is checked.
7. ***Select*** report output formats as desired (HTML, PDF, Excel, Excel Data, CSV, XML)



8. Scroll down to the **Delivery section.**
9. ***Click Send the report by email.***

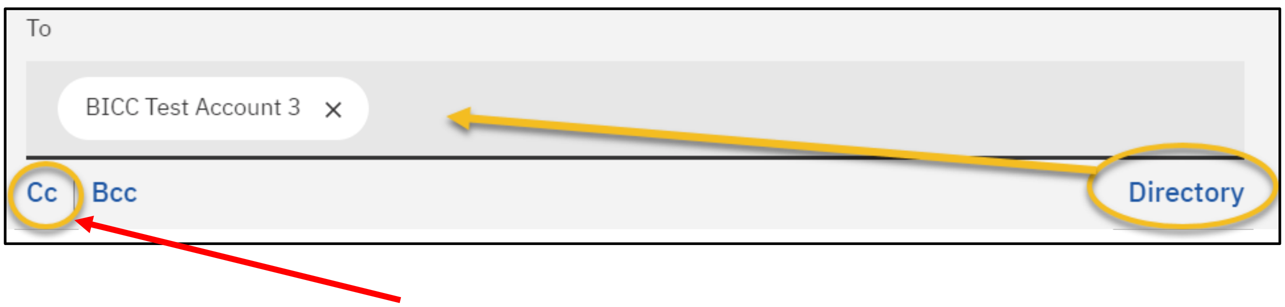
Notice there are currently <u>No recipients</u>.



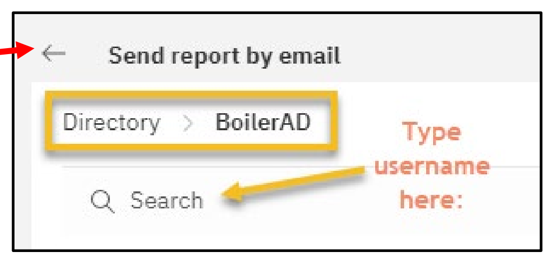
10. **Click *Edit details*** to the right

11. As you can see, your email automatically appears in the **To:** block.

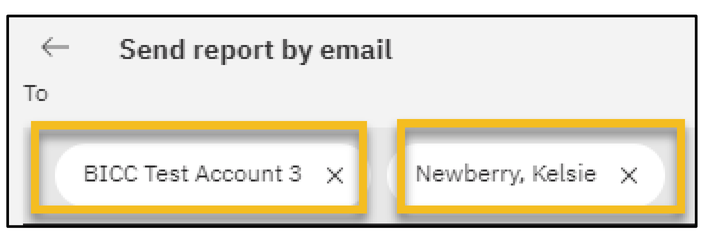
** To add other recipients within Purdue University, you must use the ***Directory*** to the **right** of your **ID.**



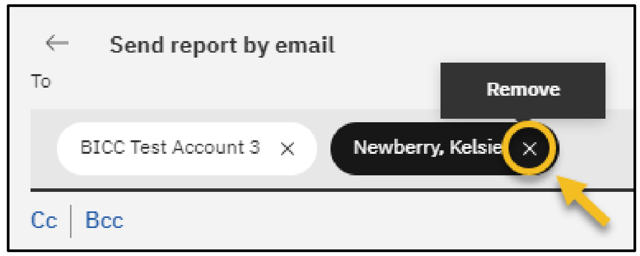
12. Or begin typing another user's **FULL PURDUE EMAIL** address in the Cc line ***Note***: ***User emails must be used here. Be sure to look them up before adding them to the list.***
13. To use the ***Directory***, Select ***BoilerAD*** and search for the recipient(s) ***username***. Then hit ***Enter.***



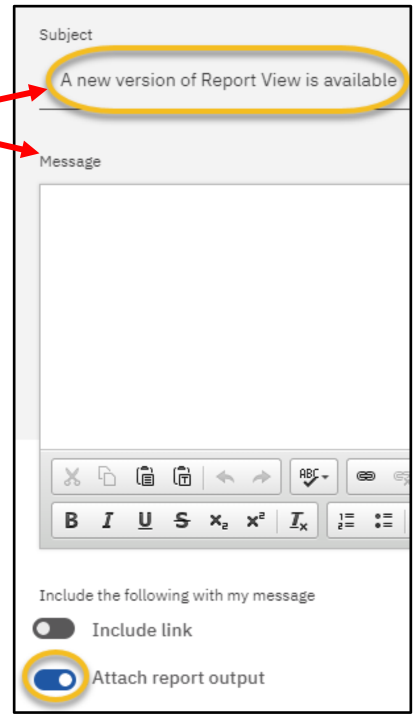
14. Select the recipient(s) then click ***Add.***
15. After you receive your confirmation message, click ***Close*** to get back to the **Delivery section**.
16. Notice there are now **two** recipients.



Click the ✕ to remove users from the **To:** block.



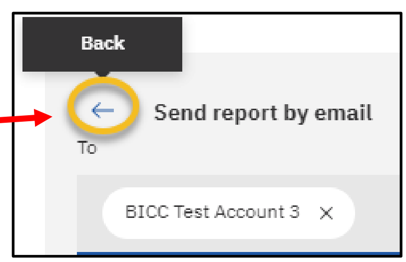
17. You can edit the **Subject** line as well as add a **message** to the email, if desired.



18. Notice the option ***Attach the report*** is already checked.

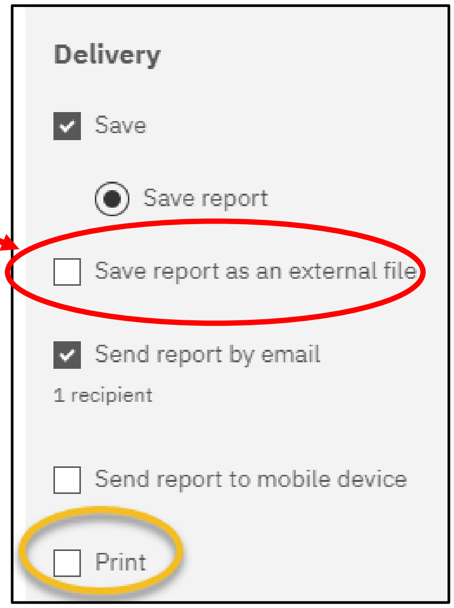
- ***(Please consider report content and security when using this feature).*** For this example, we are going to leave this box **unchecked.**
- Including a link is the most secure delivery option. Leave this box checked. ***Recipients must have a Cognos license to open the link in the email.***

19. Click on the ***arrow*** to get back to the **Run as** screen.



CAUTION Users may see the Print report option checked. It **MUST** be **<u>unchecked</u>** for the report to run! **Confirm the *Print report* <u>is not</u> checked** (not a working feature).

CAUTION **<u>DO NOT CHECK</u>** ***Save report as an external file*** as this requires a special set up. You must have made previous arrangements for this delivery type with the BICC.



20. **Click *RUN*** to return to the ***Run as*** form.

21. ***Select*** your prompts
22. Then select the ***Finish*** or ***Submit*** button.