IPFW IBM Cognos Connection User’s Guide

Cognos Version 10.2.2

April 4, 2016
References and text in this manual have been provided with permission by Purdue University, West Lafayette, Indiana. Some changes have been made to meet the needs of Cognos users at IPFW.

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How to Use this Manual

This manual is designed to meet the needs of consumers and report authors working with the Banner Student data. The format offers information about Cognos that is applicable to all users. Efforts have been made to organize the content in a way that will make it easy to use regardless of your business need.

Screen shots may differ slightly from your view of the same forms in Cognos.

Exercises
The instructions are written as generally as possible. We will mostly use the shared reports open to all Cognos users at IPFW as examples.

Quick Tips
Quick tips will be included at times when information may be needed at a quick glance as you use Cognos. The tips are located on the right side of the page close to the paragraph with the information you need. It will be in the format you see on this page.

Important Information
Occasionally important information pertains to a set group. When that occurs, it will be included in a box like this one which contain information for student report authors.
Introduction

Cognos is a web-based reporting solution which allows data consumers to create and run reports. The focus of this manual is running reports. The IPFW Cognos licensing consists of the following components:

- IBM Cognos Connection – used to run reports
- IBM Cognos Query Studio - ad-hoc report creation tool
  (includes IBM Cognos Connection)
- IBM Cognos Report Studio - managed reports creation tool
  (includes IBM Cognos Connection and IBM Cognos Query Studio)

Licensing Information

Cognos is a suite of applications that requires a license for each user. Licenses are tiered so that access to tools is limited to meet individual needs. The license you receive is based on the role(s) you have been assigned. Most users are only Consumers. Report Authors are located across campus have been identified and assigned the report authoring licenses. Your trainer can answer questions on who should be contacted regarding existing reports and new report requests.

<table>
<thead>
<tr>
<th>Report Author Licensing</th>
<th>Consumer Licensing</th>
</tr>
</thead>
<tbody>
<tr>
<td>• IBM Cognos Connection</td>
<td>• IBM Cognos Connection</td>
</tr>
<tr>
<td>• IBM Cognos Query Studio</td>
<td></td>
</tr>
<tr>
<td>• Report Studio</td>
<td></td>
</tr>
</tbody>
</table>

All users access Cognos with their network User ID and current Password.

If you have any questions regarding licensing, please contact Maureen Linvill at linvillm@ipfw.edu for more information.
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).** Purdue provides documents regarding restrictions and data handling.

Here are links to the security requirements. Review them for protection of data and for your own safety.

**Data Classification Requirements**

[http://www.itap.purdue.edu/security/policies/dataConfident/restrictions.cfm](http://www.itap.purdue.edu/security/policies/dataConfident/restrictions.cfm)

**Renewing Credentials**

The scheduling feature is based on your login and **MUST** be renewed when you change your network password. **Scheduled reports will fail unless the Renew Credentials is completed!**

1) To correct the issue
   
   a) **Click on My Area Options, My Preferences**
   
   b) **Click on the Personal tab, scroll down**
   
   c) **Click on Renew the credentials.**
   
   d) It is suggested when changing your network password; you log into Cognos and renew your password.
Being a Consumer of Reports

Consumers use IBM Cognos Connection to run pre-written reports (called report objects). You can schedule, view, download, and print information based on the report logic. The resulting information can be exported from the report objects into these formats:

1. Excel (.xls or .csv) for mail merge or import into other programs,
2. Adobe Acrobat (.pdf) for printing, or
3. A web based HTML format for viewing.

Banner student data for Cognos reports usually comes from one of two sources. Most of the reports in Cognos will display which data source is referenced in the title and in the header of the report output, (PROD) or (ODS).

<table>
<thead>
<tr>
<th>Banner PROD</th>
<th>ODS (Operational Data Store)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The data in the reports comes from Banner Production and is live and up to the minute.</td>
<td>• Data is refreshed nightly so report results are based on the previous day’s activities/changes.</td>
</tr>
<tr>
<td>• Reports take longer to process.</td>
<td>• Most all new reports are written to use ODS data.</td>
</tr>
</tbody>
</table>

Communication

Efforts are made to communicate information that will affect your use of Cognos so all Cognos users are added to the Cognos listserv. This allows us to notify you of system outages, new reports available for use, or to share timely tips and tricks.

If you have any questions regarding the listserv and its uses, please ask your trainer.
Setup Information

When using Cognos to run reports, steps must be followed for the software to work correctly and to keep data secure. Requirements are listed below.

1. Your IPFW network ID and password are required for authentication to Cognos.

2. On a PC, Microsoft’s Internet Explorer or Firefox are the only supported browsers.

3. Users can only use Cognos off campus via a VPN connection. Contact the IPFW Helpdesk at 481-6030 for more information.

4. Specific settings are required to download report output in CSV or Excel format. The settings are saved in your profile on each computer you use. Instructions must be followed to allow the files to download. Use the instructions:
   - The first time you use Cognos on a faculty/staff computer unless you have already followed the process on that PC.
   - After installation of a new PC or any service work that may have reset your internet settings.

Internet Explorer

Depending on how Internet Explorer options are set, Excel and CSV file types may not open automatically. To prevent problems, verify or update your Internet Explorer settings based on the instructions below.

1. Click the Windows Icon found in the lower left corner of your system tray.
2. Select All Programs.
3. Scroll to find IPFW Applications and select.
4. Under the Employee subfolder, click on Internet Tools.
5. Click on the object Cognos Recommended Internet Explorer Settings.
6. Your PC will now allow downloads for Excel and .csv files.
Accessing Cognos

Cognos requires a log-in to access reports, called IBM Cognos Connection. This means you must also log out when you are finished working in the program (instructions on Page 6967). To access IBM Cognos Connection:

1. The URL for Cognos is https://cognos.ipfw.edu/ibmcognos.
   NOTE: For future use, you may wish to add the Log on page to your favorites list or the Links toolbar.
2. Enter your network ID and password in the in User ID: and Password: fields.
3. Click the OK button or press Enter to continue.

4. When authentication is complete, you see the IBM Cognos Welcome page. This includes links to various Cognos software based on your user profile, so displayed items vary by user.

5. You may uncheck the Show this page in the future checkbox in the lower left corner. Future logins will skip this screen and send you directly to IBM Cognos Connection.

6. Click the IBM Cognos content link to see folders and reports assigned to you based upon your access.
The IBM Cognos Connection Screen

There are many parts to the Cognos Connection window. The components are shown below, with detailed information for key icons and areas.

1. **Refresh** – refreshes the current page for any changes that have been made.
2. **My Area** – includes views of My Preferences and Schedule Management.
3. **Launch** – Launches Drill Through Definitions (not yet available) and Report Authoring tools like IBM Cognos Report Studio and IBM Cognos Query Studio.

4. **Tab Menu** – used to create/edit/rearrange your tab structure.
5. **Breadcrumb trail** – used to show the user’s location, as well as provide a link to quickly move back in the folder structure by clicking the link desired.
7. **List View and Details View** – a choice of ways to see information about the report. It is used to see folders and reports in a list format, or view them with detailed descriptions of the reports.
8. **Set Properties** – if properties for the current tab/folder need to be changed, they can be done with this icon.
9. **Order** – allows you to specify the order of reports and folders in areas where you have permission to do so.

**Report Authors**
Launch (#3) also allows you to launch Business Insight tools, IBM Cognos Report Studio, and IBM Cognos Query Studio.
10. **Entries**: – the number of entries available in the list view at any given time. To see more entries, change the numbers in the boxes and click the arrow to the right to refresh. You can also move through the folders by using the **First, Next, Previous, Last** arrows.

11. **Actions** – a column with several icons that allow you to launch commands. The ability to see icons is restricted to the user’s Cognos license, and may change from report to report.
Setting the View

Users are able to set the IBM Cognos Connection view to either of two formats, list or details. Here is a comparison of the

Report authors create report and folder descriptions in the Public Folder tab. A disadvantage of the List View is that it does not show a description of the report in the IBM Cognos Connection window; however, the description can still be found by clicking the Properties icon. This manual is written to take advantage of the Details View option to see the description in the IBM Cognos Connection window.

1. In the IBM Cognos Connection window, click the Details View icon.
Tabs

The main IBM Cognos Connection window uses tabs as an organizational tool. Tabs include User Resources, Public Folders and My Folders.

<table>
<thead>
<tr>
<th>User Resources Tab</th>
<th>Public Folders Tab</th>
<th>My Folders Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>• IPFW specific documentation and information</td>
<td>• Default tab from Cognos</td>
<td>• Default tab from Cognos</td>
</tr>
<tr>
<td>• Consumers cannot save items in this tab</td>
<td>• Contains business and departmental folders</td>
<td>• All users can copy and save to folders within this tab</td>
</tr>
<tr>
<td>• All users can view this tab</td>
<td>• Contains IPFW Shared Reports folder</td>
<td>• All users can view this tab</td>
</tr>
<tr>
<td></td>
<td>• Consumers cannot save to folders in this tab</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• All users can view this tab</td>
<td></td>
</tr>
</tbody>
</table>

Toggle between the tabs to become familiar with their differences.

Note: When you click the Public Folders tab, the screen returns to the last folder viewed, it does not automatically return to Public Folders. Look at the Breadcrumb Trail if you are not sure where you are in the folder structure. The Breadcrumb Trail is explained in detail on Page 11.

Report Authors

You can save reports in your business area folder(s) within the Public Folders tab.
Public Folders Tab

The Public Folders tab contains the folders available to the user. Access is based on user roles and business area or department. The folders that appear vary by user. The folder structure changes from time-to-time as reports and business units are added or changed.

Your screen may not have the same folders, but you should be able to navigate inside each available folder.

1. Click the Public Folders tab.

2. Click the IPFW Shared Reports folder, click the Class Rosters folder.

3. Notice the Breadcrumb Trail underneath the Public Folders tab. You can use the Breadcrumb Trail to navigate back to other folders in the hierarchy, and you can use it to determine your own location in Cognos. In the example below, you are current locations is the Class Rosters folder; from there you can click on the links to Public Folders or IPFW Shared Reports to jump directly to any one of them.
**My Folders Tab**

The objects in the **My Folders** tab are not viewable by other users. This means that only you can see the folders and reports in **My Folders**. This is important to consider when saving documents that need to be shared with (or edited by) others.

Be very careful when deleting items from **My Folders** or any folders underneath it. Unlike the IPFW I: or O: drives you use to store files on your computer, objects (including folders and reports), are not recoverable if deleted. If you delete something that you need to use again, a new object could be created from the original – if the original resides in a folder where you have access. If it does not exist, a report author will need to re-create the report based upon your specifications.
Folder/Report Structure

As previously noted, each report and folder has an icon and text that appear in Details View. To better understand the structure of the report in the IBM Cognos Connection window, here are some definitions.

Components of the report/folder structure include:

1. **Checkbox** – used to select a report and use the toolbar options
2. **Report Icon** (shown above) – indicates the default option to run the report (more on page 14)
   a. **Folder Icon** – (shown below) the color signifies if the folder holds reports or packages
      i.  = Packages (only visible to Report Authors)
      ii.  = Reports
3. **Hyperlink** – a single click runs the report or opens the folder
4. **Text** – provides information about the report, including saved date and time
5. **Report Options** – Other processing possibilities for the report (more on page 15)
Report Icons

Report icons indicated the default for the report to be run. Options include:

**HTML** – This is a report’s usual default. It is web based and designed for viewing output of the report on-screen.

**Delimited text (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.

**EXCEL – NOT COMMONLY USED.** Conversion from Cognos to Excel limits users from resorting data properly due to grouping issues. Items with these icons are specially formatted based on the report output:

2002 – Does not have the full date formatting problem that occurs in 2000 Single Sheet. – This output renders the report in native Excel XML format that provides a fast way to deliver native Excel spreadsheets. Charts are rendered as static images. Row height can change in the rendered report to achieve greater fidelity.

**2007**

**PDF** – Use this for printing and distributing output in Adobe Acrobat Reader. You must have administrator privileges to specify the advanced PDF options.
Report Options

The icons/options after the date offer several processes. From a window in IBM Cognos Connection, hover over the icons to view their names.

- Properties – rename a report, and/or add/modify descriptions of reports that belong to you (Page 16)
- View report output versions – view previously saved output versions of the report (Page 57)
  (This icon is not seen in the image. It is only seen when report versions are available)
- Run with Options – choose report output type, send output to email, and create email lists (Page 28)
- Create a report view – create a report view in a new location (Page 37)
- Schedule – schedule a report to run at a later time, or on a regular interval (Page 55)
  More... Perform a specific action – includes Move, Copy, and Delete
Report Properties

Report properties provide valuable information about the object (folder or report). If you own the report (e.g., reports you copy into your My Folders tab), you will use this area to change the report’s name, description or screen tip. If you do not own the report, you can find the report owner’s name, and, if it has been entered, a contact email address in the event that you have a question.

1. Find a report and click the Set Properties icon below it.
2. Note that under the General tab, the report’s owner is named. In the example below, the report is owned by Linvill, Maureen and the email address link allows the user immediate contact for questions about the report itself. Other options are available when you have your own copies of the reports. They will be discussed later in the manual.

3. Click the Close button to return to IBM Cognos Connection.
Working in My Folders

My Folders is the area where you can create folders, schedule automated reports, and create report views.

New Folders

Users can create folders in My Folders for organization of reports. Depending upon your preference reports can be stored in the folders, or they can be stored directly under the My Folders tab.

1. Click the My Folders tab.
2. Click the New Folder icon.

A New Folder Wizard appears.

a) In the Name: box, enter Daily Reports. This is a mandatory field; the other two fields are optional.

b) In the Description: box, enter Contains the reports I run each day, including the ones that are scheduled to run automatically. This text appears in the Details View option and when you view the properties of the report. Although this narrative is optional, it is very beneficial since the folder is described without the need to open it.

Note: If the folder changes (or you make a typographical error) the description can be edited from the IBM Cognos Connection window by clicking the Properties icon under the report’s date line.

c) In the Screen tip: field, which is optional, you can add a tip that will appear after the title of the folder when you hover over the folder; it is also used by screen readers for the visually impaired.
d) Verify that underneath Location: you see My Folders. If it is not there, click the Select My Folders link and the text will appear. The screen should look like the one below.

![Image of the My Folders screen with a new folder named Daily Reports]

- Description: Contains the reports I run each day, including the ones that are scheduled to run automatically.

- Screen tip: 

- Location: Public Folders > Student Information Support Services > Maureen

- Select another location... Select My Folders

- Cancel  < Back  Next >  Finish

- Click the Finish button

Reports can now be saved in the new folder.

![Image of the My Folders screen with a new folder named Daily Reports]
Move Action (Limited to One Object)

You can use the More... link to move reports in and out of folders for better organization.

1. Find a report in My Folders.
2. Click the More... link located below the report’s date.
3. In the Perform an action window, click the Move... link.

4. Make sure Cognos > My Folders is displayed as shown in the image below.

5. Cognos requires that you navigate to, but not open, the folder where you want the report to reside. In this example, the report will be placed in the Daily Reports folder. Click the radio button next to the Daily Reports folder to select it.
6. Click the OK button.
7. Click the Daily Reports folder link and verify the movement of the report.
Delete Objects in My Folders

Folders and reports can be deleted from any area inside of the My Folders tab. To demonstrate this, we’ll copy the report we just created into the My Folders tab and delete the one inside of the Daily Reports folder.

1. Click the checkbox next to a report you want to delete.

2. Click the Delete icon.

3. A warning box appears. Click the OK button to complete the delete process.
Specify the Order of Entries (My Folders only)

You can specify the order of folders and entries in the portal. For example, you may decide to organize entries by level of usage. To do this you’ll stop the alphabetical order and place entries that you use daily at the top of the list.

By default existing entries are sorted first by type (folders followed by reports) and then alphabetically. If you specify the order, new entries (reports and folders both) appear alphabetically at the end of the list. Follow this process below to change the order of your objects.

1. While still in the My Folders tab, click the Order icon on the toolbar.

2. The order of folders and entries are done independently. Select the entries in the Shown in default order list box and click the green arrow to move them to the Shown first list box.
   a) Move the shortcut you created and one report to the Shown first: box.

The names of the Entries are followed by text that indicates the property of the object (folder, shortcut, query, report).

Report = created in Report Studio
Query = created in IBM Cognos Query Studio
b) If you select and move any object incorrectly, click on an object in the 
*Shown first:* box and use the *Up, Down, To top, or To bottom* links to 
move the entries within the list.

c) Click the **OK** button.
Report Descriptions

Best practice standards suggest that the report description should offer enough information for you, as a consumer, to determine if the report provides the results you need. Although the construct of the report description may vary from college-to-college, or even from person-to-person, the more concrete the order of the description appears, the more quickly you will be able to scan the description and determine which report will run the appropriate data.

A different standard may be set by your report authors; contact the report owner if you need assistance to understand the logic. Refer to Page 17 for the location of the report owner’s name and email address.
Running a Report

When you are ready to run a report using Cognos, you need to know what to expect when you click the hyperlink, including the way to use prompts and how the server responds when your report is generated.

Prompts

As discussed previously, when designing reports, special consideration is given to provide users with the ability to change parameters. This allows a report to be used in multiple ways, and in many cases by multiple users, without creating unique reports specific to only one need. These parameters allow the report to be filtered for individual results. The ability to change parameters is done through the use of a prompt. Prompts are built by the report author and vary based upon the need. When you run a report, one or more prompts appear and you have the opportunity to choose your own parameters or limits for running the report.

Prompts are included in reports to limit data results based upon consumer selected values. Prompts act as questions that help staff to customize the information in a report to suit their own needs. Although not all reports include them, report authors are able to use the prompts responses to automatically appear in the titles of reports.

Prompt Design

Prompts appear in a variety of formats. The design of the page is limited only to the creativity of the author. Some prompt pages will have bold headers. Others will have no headers at all. There may be multiple prompt pages, and each page contains a Cancel and a Finish or OK button to cancel or execute the report.

Prompts can be (but aren’t limited to):
1. Drop down single select
2. Check box multi-select
3. Lines that can be single or multi-selected
4. Text boxes
5. A range of values

Mandatory vs. Optional Prompts

Prompts may be required or they may be optional. A red asterisk next to the prompt indicates this prompt is mandatory. Some prompts allow you to choose only one value.
When multiple values are permitted and desired, use the Ctrl key and/or Shift key with the mouse to select multiple values within the prompt box. You can also use the Select all and Deselect all links below the prompt.

Here are two examples of prompt pages with multiple kinds of prompts, including drop down, lines that can be single or multi-selected and a textbox. They also have required and optional prompts that are identified.

At the bottom of the report, there is an OK or Finish button. It is grayed out until mandatory parameters are chosen; they are available once the report prompts are selected.

Report authors have the ability to create different designs/layouts based upon their own creativity.
Server Response

When the report is initiated, the server generates the final report. Depending upon the amount of data that will be 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:

```
Your report is running.

Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.
```

Do not close Internet Explorer without letting the report complete or cancelling it. If you neglect to do one of these actions, the server continues to gather data. You can help server response time to others by being a good steward as you generate reports.

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.).
Find a Report

As a new user, all of your reports will be found in the Public Folders. You will see a folder that matches your area, such as Public Folders > Biology or Public Folders > IPFW Shared Reports. The structure underneath your main folder will vary by user depending upon security roles. The table below is not designed to offer an exact path to the reports you need, but it will offer you a sample of possibilities for navigation.

<table>
<thead>
<tr>
<th>Business Area/Department</th>
<th>IPFW Shared Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Reports specific to your business area or department.</td>
<td>• Reports to be consumed by all student users.</td>
</tr>
<tr>
<td>• There may be subfolders by topic depending on the number of reports in your business area or department.</td>
<td>• Reports contain common data output.</td>
</tr>
<tr>
<td></td>
<td>• Used to avoid redundant reports across business areas or departments.</td>
</tr>
</tbody>
</table>

If you know the title of the report you need, you can use the Search Tool in the header to find the report.

The search will return any matching reports in a screen that looks like this:

You can run the report from this window, or use any of the processes under the Actions column. If the location is needed, click on the Properties icon to view the location in the column on the right. The report authors in your area or Kim de Leon should be able to help you find the reports you need, and explain the best place(s) for you to look for a particular report.
Report Output Options

Reports can be run in a variety of formats, including HTML, PDF, Excel, and more. Most reports default to HTML (web) format. This format is used to gather information on-screen rather than to print. To run the report in a different format, you can use the **Run with options** icon which can be found next to the report **Properties** icon.

Run a report using a format that is not the default format.

1. Navigate to an HTML report in **Public Folders**. Look for the **HTML** icon.
2. Click the **Run with options** icon on the right side of the page across from the report title.
3. The **Run with Options** window appears allowing you to change the report output and run options based on your needs. Here are the different options for this report.

<table>
<thead>
<tr>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML</td>
</tr>
<tr>
<td>PDF</td>
</tr>
<tr>
<td>EXCEL 2002</td>
</tr>
<tr>
<td>EXCEL 2007</td>
</tr>
<tr>
<td>Delimited text (CSV)</td>
</tr>
<tr>
<td>XML (generally reserved for Framework Managers)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>English (United States) – default setting.</td>
</tr>
</tbody>
</table>

View the report now – default setting. The report is immediately processed in the selected format.

Print the report in PDF format: - **DO NOT USE**. This feature is NOT active in our environment. Selecting PDF in the **Format** section yields the same results.
Prompt for values - DO NOT uncheck this—This box is checked as a default. It allows the report to prompt for specific values related to each report run. If you deselect this, the report runs with values selected by the last user rather than allowing you to select your own.

When specifications have been made, the user has the option to click the Run button to generate the report or click the Cancel button to return to the report folder.

4. Choose the PDF Format, but do not click Run.

5. Click the Cancel button to stop generating the report and return to IBM Cognos Connection.
Processing Reports in HTML

HTML reports are web based and designed for reviewing data via your PC monitor rather than in print format. The report renders on the page and, depending upon how many rows are requested from the report author, you may need to move from page to page to see the entire report and a summary line. The HTML icon indicates the report defaults to process via the web.

1. Find an HTML report in Public Folders.
2. Click the report name hyperlink to launch the report.
3. A prompt is probably attached to the report; the prompt page displays. As mentioned in the previous section, this is to select data parameters (limits) for the report output. (See Page 23 for more information.) Select prompt values as needed. Here is an example of a prompt.

4. Click the Finish/OK button at the bottom of the page to process the report.
5. The following image is displayed while the report is running.

Reminder: If you need to stop running the report, always click the Cancel button before exiting. If the report is not cancelled, it continues to run against the server until it is finished. This causes the server wasted processing time.
6. When the report has finished processing, it displays in the Cognos Viewer.

![Image of Cognos Viewer](image)

**Full Time Annual Rate by Campus**

<table>
<thead>
<tr>
<th>FULL_TIME_ANNUAL_RATE</th>
<th>Mon Campus - WL</th>
<th>Regional Campuses</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990-91</td>
<td>16,952</td>
<td>16,952</td>
<td>16,952</td>
</tr>
<tr>
<td>BISSET</td>
<td>16,952</td>
<td>16,952</td>
<td>16,952</td>
</tr>
<tr>
<td>SONO</td>
<td>39,020</td>
<td>39,020</td>
<td>39,020</td>
</tr>
<tr>
<td>BURNETT</td>
<td>55,800</td>
<td>55,800</td>
<td>55,800</td>
</tr>
<tr>
<td>BURR</td>
<td>69,000</td>
<td>69,000</td>
<td>69,000</td>
</tr>
<tr>
<td>CAINE</td>
<td>21,008</td>
<td>21,008</td>
<td>21,008</td>
</tr>
<tr>
<td>CARREY</td>
<td>38,900</td>
<td>38,900</td>
<td>38,900</td>
</tr>
<tr>
<td>CARUESO</td>
<td>22,430</td>
<td>22,430</td>
<td>22,430</td>
</tr>
</tbody>
</table>

7. A scroll bar may appear on the right side of the report; if it does, use it to move to the bottom of the page.

8. The report has more records than you see on the screen. Four additional options appear at the bottom left of the page, as well as a page number in the center. On the first page of any report, the Top and Page up links are inactive. Click the Page Down link to move down through the list and the Top and Page up links activate. Notice that the page numbers follow in sequence for each Page Up/Page Down.

![Image of Cognos Viewer with page navigation options](image)

9. Click the Bottom link to jump to the bottom of the list. Notice that the page number is now a question mark (?) rather than a number. Because pages are rendered with a specified number of records per page, when you jump to the bottom, the records that appear at the end may appear on a previous page as well.

10. Click the Return icon to exit the report and return to Public Folders in IBM Cognos Connection.

**NOTE:** If you click the Home icon instead of the Return icon, you will return to the User Resource tab in IBM Cognos Connection.
Processing Reports in PDF

Reports can be processed in PDF format for printing purposes. Adobe Acrobat Reader is required to view this format. The PDF icon indicates the report, by default, will process in PDF format using the same process as running a report in HTML format.

If the report does not have this icon you can still run it in PDF format.

1. Select the Run with options icon on the right side of the page across from the report name in Public Folders.
2. Click the drop-down arrow in the Format box and select PDF.
3. Click the Run button.
4. Select prompts as necessary.
5. Click the Finish or OK button.
6. The report opens in a PDF window as shown in the example below.

7. Click the **printer icon** on the PDF page to view/modify printing options. If you want to print the page, click the **OK** button and the report will be sent to your selected printer. Otherwise, click **Cancel**.

8. Additional pages may be viewed by moving the slide bar down, located on the right side of the screen.

9. Click the **Return** icon to exit the report and return to IBM Cognos Connection.
Processing Reports for Excel and CSV Formats

Reports can be processed in Excel or comma-separated values (CSV) formats to join with other data, merge with Word documents, etc. *It is recommended to use CSV instead of Excel. Excel formats from Cognos will not allow you to resort or work with the data if there are null data cells. Instructions below include how to save the CSV file as an Excel document once it is extracted from Cognos.*

The instructions in this section are for Excel 2007 format, but the instructions for the other formats are similar. The icons for Excel and CSV formats were detailed on Page 14.

1. If the report’s default format is not Excel or CSV, you can still run it in one of those formats using the **Run with options** method.

   1. Select a report with the CSV format icon or follow steps 1-5 in the Processing Reports in PDF section beginning on Page 32, except choose **Delimited text (CSV)** in Step 2.
   2. A warning box will appear regarding the file extension, click Yes.
3. The report will open in Excel for review.
   a) If you wish to save the file, click **File**, then **Save As** on the tool bar.
   b) Use the displayed **Save As** window to navigate to the location where you wish to save the file.
      **Remember**: Do not store sensitive student data on your local drive (C:).
   c) Rename the file in the **File name** field.
   d) Select the drop down arrow in the **Save as type** field and select **Excel Workbook (*.xlsx)** option. This will allow the file to be read in Excel.
   
   ![Save As Window]

   e) Click the **Save** button.
Switch Formats Quickly

You can switch formats without re-running the data every time.

1. Choose and run a report in PDF format. (Refer to Page 32 if you need assistance.)
2. While viewing the PDF output of the report, you have the option to view the report in other formats.
3. In the upper right corner, click the View in PDF Format dropdown and choose View in HTML Format.
4. The data will be reformatted and appear in an Internet Explorer window.
5. If you would like to look at other formats, repeat step 3 choosing other formats as desired.
6. Click the Return icon to exit the report and return to IBM Cognos Connection.
Create a Report View

Reports, created by report authors and stored in Public Folders, may be saved as report views in your own My Folders tab. This allows you to save your favorite reports in a location that is easily accessible. Report views are a combination of a shortcut and a dynamic copy of the original report. The shortcut information is stored in the properties of the report view. When the report view is opened, the shortcut property is used to link to the original report. As a dynamic copy, it remembers any properties you programmed that are different from the original. For example, properties such as prompt values, schedules, delivery methods, run options, languages, and output formats are retained in the report view.

Creating a report view does not change the original report. If you cannot remember where the report is located in Public Folders, you can determine the source report for a report view by viewing its properties. The report view properties also provide a link to the properties of the source report at the bottom of the page. If you need assistance to find the report properties, refer to Page 17.

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 icon changes to a Broken Link icon, and the properties link to the source report is removed. The following steps guide you through making your own report view of a report.

There are two processes to create a report view. The first is done using the Report View icon under the report name and description. The second can be created after you run the report.
Report View from the Folder Structure

1. To create a report view without running the report, find a report in the IBM Cognos Connection folder.
2. Click the Report View icon under the report information.

3. Cognos defaults the original name of the report and adds Report View of at the beginning. This facilitates finding the original document if you need to, and if you discuss the report with others you will avoid confusion if everyone uses the same report name.

4. The Description defaults to the description that appears in the original file. This report will reside in My Folders, so we'll add personal information to the description. (This is an optional step, but it can be helpful.)
   a) Click inside of the Description box, in front of PROMPTS:
   b) Add the text, “I use this report the first week of classes.”
   c) Click the Enter (or return) key.
d) The description’s first line should look like the first line below:

![Description Image]

5. Click the **Select My Folders** link.
   (As you create other folders, you may wish to use the **Select another location**... link and navigate to a folder where you wish to place the report.)

6. Click the **Finish** button.

7. The report view is now in **My Folders** and can be accessed more easily than finding the report each time in **Public Folders**.

8. Open **My Folders** and find the new report.
   a) The report will alphabetize at the bottom of the window.
   
   b) Notice the new **Report View** icon and the new text in the description.

   ![Report View Icon]

   **Note**: Report view icons are the same graphic image as the default icons to facilitate recognition of the report format, but they have a grid in the upper left corner. Here are 2 examples:

   * HTML Report View
   * PDF Report View
Report View from the Report Results

1. To create a report view after running the report, move to a report in **Public Folders**.

   ![Active Student Overall, Cumulative and Term GPA's - (ODS) Used to view students current overall GPA, end of term GPA's and end of term cumulative](image)

2. Click the name text link to run the report.
3. The prompt page will probably appear.
   a) Select the prompts as needed.
   b) Click the **Finish** or **OK** button.
4. Note the new toolbar at the top of the report.

5. You can save the report view by clicking the dropdown arrow next to **Keep this Version** and choosing **Save as Report View**.

6. When creating a report view using the wizard as we did in the previous section (step 3), it was possible to change the description and screen tip. When you use the **Save as Report View** option, only the **Name** can be changed during the process. Use the default name to create this report view.

7. Click the **Select My Folders** link.
8. Click the **OK** button.
   **Optional:** If you wish to add a report description, you’ll need to add it to the report view you just added to **My Folders** by going to **Properties**. You can copy the report description from the original and paste it into the report view, or write your own description.
Report View Options

When a report view is saved, the default action is generally to save the most recently run report. This can be changed so that the report re-runs every time to display new data and/or prompt for new values. Even if you don’t wish to change the default actions of the report view, it is best practice to examine the defaults so that you understand the data response when the report runs.

1. To view the Report View parameters, find a report in My Folders.
   
   ![Report View of Class Rosters by Subject Code with Email - (PRCD)](image)

2. Click the Properties icon.
3. Click the Report view tab.

4. The Default action: is to View the most recent report. Use the dropdown to change the default to Run the report.
5. You can also override the default values to run the report in a different format. This is extremely helpful if you find a report that runs in a version different from the one that you need. Instead of changing the report each time it runs, you can click Override the default values and chose a different format, language, or update the options for PDF output.
   
   a) Click the checkbox next to Override the default values to see the hidden options.
   
   b) Without making changes, click the checkbox again, to hide them.

Report Writers

Under the Report View Default action: an additional option appears allowing you to open the report with IBM Cognos Query Studio or Report Studio
6. **Prompt values** allow you to pre-select the values for prompts so that they match your needs every time the report is run.
   
a) Click the **Set...** link to set default prompt values.

   ![Prompt values](image)

   - Select prompts.
   - Click the **Finish** button.
   - The value(s) you have chosen appear in the **Prompt values** section for easy reference in the future. By using the **Edit...** and **Clear** links at the bottom, the values can still be edited or cleared so that the default prompts are reset again as demonstrated in the image below.

   ![Prompt values](image)

7. Make sure the **Prompt for values** checkbox is checked so that you can change the prompts if you need to. They will still default to your specifications, but you will be able to change them each time the report is run.

8. Notice that there are also advanced options available. Click the **Advanced options** link to view them, but don’t make any changes on this report.

9. Click the **OK** button. The report now defaults to run the report with your parameters.
Emailing Reports
Emailing Reports That have 2 or more personally identifiable items in the report.

Personally identifiable information includes, but is not limited to:

- Student Name
- Name of student’s parent or other family member
- Address of the student or the student’s family
- A personal ID, including SSN
- Biometric record
- Other indirect indicators (birth date, Place of Birth, mother’s maiden name)
- Other information alone or in combination that would make identity easily traceable.

Links to reports can be emailed to other IPFW email addresses, as long as the user has a COGNOS license. If an IPFW employee does not have a COGNOS license and needs to see the output of the report you will need to save the output to your “I” or “O” drive and then use filelocker (filelocker.purdue.edu) to send the output.

Reminder: It is against university policy and security guidelines to email output to anyone outside the IPFW domain!

Emailing a link to the report is a more secure method to share the results. Using the link requires that the receiver log into the Cognos server, therefore enforcing the data security.

To email the report follow the steps below.

1. Find the report you wish to share, and click Run with options under the Delivery, check Send me the report by email.

![Image of the Run with options screen with the Send me the report by email option highlighted.]
2. Then Click the **advanced options** link in the upper right of the screen.

   a) Select **PDF** if the report is being sent as an attachment. Under **Delivery:** Click **Save the report** and then click the **Edit the email options...** link.

   b) The current user ID appears in the **To:** text box. Type any additional email addresses in the **To:** text box using the full reference (like smitht@ipfw.edu). Separate each address with a semi-colon.
Note: Do not use the Select the recipients... link. Cognos does not connect to the appropriate Exchange servers.

c) Add any full email address to Cc: if needed.
d) If you wish to blind carbon copy (BCC) a recipient, click Show Bcc to add an email address.
e) The subject line fills in automatically, but can be edited as needed.
f) Add text to the Body: to include a message to the recipient(s).
g) Select report type.
   • Select Include a link to the report requires users that you are sending the report link to, to log into the Cognos portal to retrieve report output. Email recipients MUST have a Cognos license for this option to work.
   • Do not Attach the Report! If a user does not have a COGNOS license and needs the output, you will want to run the report and save the output to your “I” or “O” drive and then use Filelocker (filelocker.purdue.edu) to send the information to the IPFW employee.

h) Click the OK button.
3. The **Run with advanced options** page displays again.
   a) Under the **Delivery**: section, under **Send a link to the report by email** you will see the total number of recipients you just entered. If only 1 recipient is entered, that person’s email appears. Otherwise, the screen looks like the one below. At the bottom of this example, there are 2 recipients.

   ![Delivery: options](image)

   - **2 recipients**

   b) Verify the report output options are checked the way you want under **Formats**. Be sure PDF, Excel, or CSV are checked if you are attaching the report to the email.

   c) Leave **Prompt for values** checked.

   d) Click the **Run** button at the bottom of the screen to run the report in the background. (Select prompts if they appear.)

   e) A confirmation page appears.

   ![Confirmation page](image)

   - The recipient does not have an option to make changes so be sure to verify the options, including the format and the prompt responses you made.
   - Click the **OK** button to continue.
4. When the process is complete, you will return to IBM Cognos Connection.

**Emailing Reports that have 1 or no personally identifiable items in the report**

1. Find the report you wish to share, and click Run with options under the Delivery, check Send me the report by email.

2. Then Click the advanced options link in the upper right of the screen.
a) Select **PDF** if the report is being sent as an attachment. Under **Delivery**: Click **Save the report** and then click the **Edit the email options...** link.

b) Under **Delivery**: click the **Edit the email options...** link.

c) The current user ID appears in the **To:** text box. Type any additional email addresses in the **To:** text box using the full reference (like smitht@ipfw.edu). Separate each address with a semi-colon.
a) Add any full email address to Cc: if needed.

b) If you wish to blind carbon copy (BCC) a recipient, click Show Bcc to add an email address.

c) The subject line fills in automatically, but can be edited as needed.

d) Add text to the Body: to include a message to the recipient(s).

e) Select report type.

- The Attach the Report setting includes the PDF, Excel, or CSV output as an attachment in the email. This kind of attachment can only be sent to IPFW email accounts @ipfw.edu.
Report Scheduling

Cognos allows users to schedule reports to run on recurring dates and times. This means the user can process a routine report without manually processing it through the IBM Cognos Connection portal.

You can access the scheduler directly through the report to select days, output types, etc. Cognos also has a Schedule Management tool available on the Tool menu which allows users to see future report schedules and current statuses.

*Schedules can only be created in My Folders or in folders where you have write access.*

Automated Reports

1. To create your first schedule, find a report in the My Folders window.
2. Click the Schedule icon underneath the report.
3. Use the Frequency section to schedule a recurring date and time.
   a) Choose the By Week link (if it isn’t already selected).
   b) Run the report every 1 week on Tuesday as shown in the image above. If other days have checkmarks in the box next to them, click the check to remove them.
4. On the right of the screen, find the Start: and End: dates.
a) Leave the default **Start** date, which should be “Today”.
b) Click the radio button next to **End by**:
c) Choose an end date 1 week plus 4 days from the start date, or leave default value for ongoing scheduling.

5. You can run the report using the default values or specify the options by clicking on the **Override the default values** check box. (Refer to **Report Options** starting on Page 13 for assistance in choosing options.)
6. **Prompt values** allow you to pre-select the values for prompts so that they match your needs every time the report is run.

   f) Click the **Override the default values** checkbox to stop using the default prompt values.

   ![Prompt values](image)

   - Click the **Set...** link.
   - Select the prompt parameters.
   - Click the **Finish** or **OK** button.
   - The value(s) you have chosen appear in the **Prompt values** section for easy reference in the future. By using the **Edit...** and **Clear** links at the bottom, the values can still be edited or cleared so that the default prompts are reset again.

   ![Prompt values](image)

7. Click the **OK** button. The report is now scheduled to run automatically based on parameters you selected.
Change a Schedule

When you schedule a report to run the selected prompts, they will remain consistent in each report, but prompt values may change over time. For example, you may choose the academic period of 200910 to run daily reports for the fall semester of 2008. When the semester is concluded, you’ll need to change the academic period to a current term (like 200920) to continue retrieving the desired data. You must always be aware of output and determine when to reset the prompt(s).

Disable Automated Reports

There will be times when you don’t wish to receive automated reports – for example, if you go on vacation for a week you probably won’t need the reports during that time. When you want to disable the schedule, you can do so without losing any of the details.

1. Click the Schedule icon underneath the same report you used in the prior exercise.
2. Click Disable the schedule check box to stop the automation.
3. Click the OK button.

Enable Automated Reports

1. When you are ready to restart the report, open the Schedule on the report as you did in the Disable Automated Reports section and deselect the Disable the schedule check box to remove the check to reverse the process.
2. Click the OK button.
Schedule Management

You may view and manage your scheduled reports using My Activities and Schedules. Use the options to view entries that are completed or presently scheduled.

You can also make changes on many reports, and see which reports are scheduled.

1. In the upper-right corner, click the My Area button, and click My Activities and Schedules.
2. Click the Schedules link on the left margin, under Current Activities.

3. The screen will change and indicate enabled and disabled schedules, and the report name(s).

4. If you don’t see the report you’re looking for, examine the filters you have selected under the Filter menu on the left. Click any filtering items that you wish to change and click Apply.
5. The list shows the entries that you selected.
6. To perform an action on an individual entry, click the arrow to the right of the entry and select the action.

7. To perform an action on multiple entries, click the checkboxes you wish to change, or the checkbox next to Name to select them all.

8. At this time you can make the following changes on multiple reports:
   a) Show Details
   b) Hide Details
   c) Enable (You will be asked to confirm this process.)
   d) Disable (You will be asked to confirm this process.)

9. Click the Return icon to exit My Activities and Schedules and return to IBM Cognos Connection.
Report Outputs and Run Histories

By default, Cognos keeps a Run history of 5 occurrences so that you can verify that the report processed each time as expected. There is also a Report Output Version that keeps the data result from the date that the report was run. More information about both of these options will follow, but to use them correctly you’ll need to determine the number of reports that will be saved in the report preferences.

1. Under the My Folders window click the Set Properties icon underneath the report you scheduled.

   a) Run history: Near the bottom of the screen, the run history shows the default value of 5. You can change the Number of occurrences: or the Duration:

   ![Run history screenshot]

   Report output versions: defaults to 1. To view more than one report output, this value must be changed to a higher number (refer to the next section, Report Output).

   b) Make a change and click the OK button, or click the black X in the blue title bar at the top right of the window to return to IBM Cognos Connection.
Report Output

Report views allow users to save parameters and retrieve data that updates each time the report is run. Users also have the ability to save report output in Cognos. This process saves the report content and structure used at the time the report was processed and it becomes a snapshot in time rather than a report with current data. There is specific information that is important to know and keep in mind as you create and save Report Output files.

1. Cognos Consumer users can save report output from any report in their My Folders area ONLY.

2. Due to security configurations this feature only displays on specific reports!

3. Cognos defaults to ONE saved report output per report. You can change the default setting to allow additional saved report versions. Settings are report based so you have to change the default setting on each report that you want to save more than one version of in Cognos. If you do not increase the versions, future saves of the report overwrite the previous one saved. See Page 57 for complete instructions to increase the number of versions.

4. Remember to keep your saved output to a business needs minimum and only keep multiple versions if necessary. This helps to avoid user confusion and save space within the Cognos server domain.
Processing Saved Report Output

1. Click the **Run with options** icon underneath a report in the **My Folders** window.

2. Click the **Save the report** radio button.

3. Click the **Run** button.

4. Select the prompts as needed.

5. Click the **Finish** or **OK** button.

6. Verify the run options and click the **OK** button.

7. The **IBM Cognos Connection** folder/report menu displays while the report runs in the background and you may continue to run other reports.
8. When the report is complete a View Report icon appears. (Large reports take more time.) Click the Refresh icon and note the new icon under the Actions menu below.
View and Manage Report Output Versions

Users may view the report output, view previous reports, and manage the saved versions.

1. Click the View Report icon to see the new report or previously saved versions.
   
   ![View Report Output Versions](image)

   a) Version: displays the most recently saved report. Use the drop-down menu to see previous reports.

   b) Click the Manage versions… link to see the complete list of previous reports and their run dates.

   ![Manage Report Output Versions](image)

   g) Saved reports can be deleted when necessary. Although we won’t delete this report, but here are the steps for future reference:

   - Click the checkbox next to the report.
   - Click the Delete link on the lower right side.

   h) Click Close to return to the View Report Output Versions window.
2. Click the text link in the **Formats** column to view the selected report.

![View report output versions](image)

3. The report will run.  
   **Note:** If the report output is in a format that can be downloaded (e.g. PDF, CSV, etc.), click the **Download** icon in the Actions toolbar to download a version of the report. (Remember the University security policies on saving reports when you do this, Page 3.) Here is a screenshot of a CSV report as an example of what you will see.

![CSV report](image)

4. Click the **Return** icon to exit the report and return to the **View report output versions** window.

5. Click the **Close** button to return to IBM Cognos Connection.
Run History

You may view and a run history using **My Activities and Schedules**. Use the options to view requested dates for runs, their start and completion times, and status. You also are able to view messages and the parameters of the report run(s) as well as view the report output if there is one.

1. To view the run history details, in the upper-right corner, click the My Area button, and click **My Activities and Schedules**.
2. Click the **Schedules** link on the left margin, under **Current Activities**.
3. The screen will change and indicate enabled and disabled schedules, and the report name(s).
4. To perform an action on an individual entry, click the arrow to the right of the entry and select **View run history**.

i) A listing of the most recent runs appears in the **View run history window**. Select the **Status**: dropdown to change the results if you don’t want to see **All statuses**.

**Note**: in the screenshot below, there is an example of a report with two status a status that succeeded and one that failed.
j) Under the **Actions** menu you will find 2 icons. The **View run history details** icon is described below and **View Report** icon offers another link to view the report output versions as described in the previous section.

- Click the **View run history details** icon in the **Actions** column. The resulting window provides additional details for the given date.

![View run history details window](image)

- Click the **Close** button in the **View run history details** window.

k) Click the **Close** button in the **View run history** window.

5. Click the **Return** icon to exit **My Activities and Schedules** and return to IBM Cognos Connection.
My Preferences

Users can set personal preferences using My Preferences within the IBM Cognos Connection portal. Options that can be changed are described below. Please do not make changes with other options, as it may cause issues with processing reports and/or security settings.

In the upper-right corner, click the My Area button, and click My Preferences.

Three tabs are available in this window, General, Personal and Portal Tabs. For Consumers, descriptions will be given for the General and Personal tabs. If you want more information, use the Help option in the upper right corner to learn more about personalization after you've read this section.

Caution
Making changes to preferences may cause issues with processing reports and/or security settings.
The General Tab

1. Adjusts how many reports you see listed on Public Folders and My Folders pages.
2. Tabs provide additional screens used for troubleshooting and advanced preferences.
3. The default format for reports you create.
4. Adds grid lines or colored spacing between reports listed on Public Folders and My Folders pages.
5. Changes the style of color, text, and presentation of Public Folders and My Folders pages.
6. Toggles between showing the Welcome page at startup or omitting it – going directly to IBM Cognos Connection instead. If it is checked, the Welcome page will appear.
7. Changes report listings from List (default) to Details.
Logging Off

Users can log off of IBM Cognos Connection from any tab or file folder at any time.

1. The **Log Off** link is located near the top of the windows next to your name. Here are two examples.

   ![Log Off Link Example 1]

2. Click the **Log Off** link.

3. Make sure to close the browser to end the session.
Troubleshooting

Users may contact Maureen Linvill at linvillm@ipfw.edu or by phoning the IPFW Help Desk at 481-6030 with any questions or to report Cognos issues.

Questions or Feedback on this Document

Questions and feedback specific to this document are welcomed. Please email your comments to Maureen Linvill at linvillm@ipfw.edu.