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Documentation Information

This document shows you how to utilize the new interface for Cognos Analytics (version 11), and how to run, and download reports.

Please contact Insight@odu.edu to get more help to navigate and better use the new Cognos.

User’s menus and options might vary for each user and can be different from the screen shots in this document based on difference in access for each user.
Cognos Analytics

Home Page

Cognos Analytics has improved interface than Cognos 10. Most functionality is similar to the previous version and there are lots of new features.

Upon authentication users will see a home page and menu items similar to the image shown below. In the earlier version of Cognos navigation was based on folders which was similar to windows explorer. Cognos Analytics has new three-part fly out menus which provides users a better view when navigating from one folder to another.
There are two views for the left menu (App Bar), expanded and condensed. Most of the time users will see condensed view on the left menu.

<table>
<thead>
<tr>
<th>Expanded View</th>
<th>Condensed View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old Dominion University</td>
<td></td>
</tr>
<tr>
<td><strong>Home</strong></td>
<td><strong>Home</strong></td>
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<tr>
<td><strong>Search</strong></td>
<td><strong>Search</strong></td>
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<tr>
<td><strong>My Dashboards and Reports</strong></td>
<td><strong>My Dashboards and Reports</strong></td>
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<td><strong>My content</strong></td>
<td><strong>My content</strong></td>
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<td><strong>Team content</strong></td>
<td><strong>Team content</strong></td>
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<tr>
<td><strong>Recent</strong></td>
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Menu Icons

Clicking on the **Home** button takes you back to the home page for the application.

Clicking on the **Search** button gives an option to search for reports. It folds out from the left menu bar. Type into the search box next to the magnifying glass any keywords about reports or dashboards to search.

Clicking on the **“My Dashboard and Reports”** folder gives you a “fold out” menu with the contents of “My Dashboards and Reports” folder.

**“My Content”** folder is synonymous to “My Folders” in earlier Cognos versions. My Content folder allows users to save report output or report views to check back at later stage. Most users do not need to use this area.

**“Team Content”** folder is synonymous to “Public Folder” in earlier Cognos versions. This is the location for reports, dashboards, stories etc. that users have access to. All ODU reports are in “My Dashboards and Reports” folder in “Team Content”.

**“Recent”** shows most recently run reports and dashboards. This is the fastest way to find and rerun recently used reports.
Quick Links

Clicking on top right “Quick Links” menu provides access to most accessed reports or folders. This replaces portal tabs in the older version of Cognos.

- “My Dashboards and Reports” opens up fold out menu with contents of that folder.
- “Budget Tracking” opens up content of “Budget Tracking” folder in the fold out menu.
- “Enrollment Tracking” opens up contents of “Enrollment Tracking” folder in the fold out menu.
- “ODU Factbook” runs the Factbook report.
Team Content

Clicking on the Team Content folder button gives you the following menu. Menu folds out from the left menu bar. Click the blue folder name to navigate to that folder. In Cognos 10 and earlier versions “Team Content” was “Public Folders”. All ODU reports are in “My Dashboards and Reports” Folder.

To navigate back to the previous folder, click on the arrow to the left of the folder with 3 dots, or click on the folder with 3 dots.
Recent

Clicking “Recent” Shows recent reports which the user ran. It will be blank to start with.
Running a Report

- Navigate to the report you would like to run using “Team Content” or “Recent” Or “Search” functionality.
- There are couple of ways to run a report.
  - Method 1: Run with default setup
    - Click on the report name to run the reports with default settings
  - Method 2: Run with options
    - On finding the report, mouse over the report name to show the More icon (three dots)
    - Click on the More icon to see various options
    - Click “Run as”
    - Select HTML or CSV or PDF or Excel or XML
    - Click the “Run” button at bottom right to run the report.

Mouse over the report/dashboard you want to run. You will see 3 ellipses at the end of the report name. Click on those and a menu will popup. “Run as” is the first option.
When we click “Run as” from “More” button, we get following options:

Switching between reports
Cognos Analytics allows for multiple reports to be open at one time. To switch to a report which was run earlier in the session, click on the down pointer next to the report name at the top middle of the screen. Select any of the report from the list or select “ODU Welcome” to go the main landing page. Click on x to close the report.
Downloading a report: PDF, Excel.

When we choose PDF in the “Run as” steps mentioned earlier, after choosing the prompts output is displayed in PDF format. Move mouse over to the top center of the page and floating adobe menu appears to make selection to print or save PDF.

When we choose Excel in the “Run as” options, after choosing the prompts, the following screen appears:

Click the drop down menu to the right of the “Save” button. Choose “Save as”, the middle of the 3 choices. A popup will appear and gives you options to save the file in any desired location on your local machine.
Customizing Cognos Analytics

Cognos Analytics like the earlier versions of Cognos allows users to customize their environment.

To set any report or dashboard as your “Home”, Click on the three dots to the right of the “Quick Links”.

Click the person icon  to get “My Preferences” options. This menu allows user to change various settings. For example, user can change default report output from HTML to PDF or Excel. This would make all reports to run in the new format selected even if the default of the report was something else.

In case you use schedules to send email of report outputs, then when MIDAS password is changed, you would need to come to “My Preferences” and click “Personal” tab, then click “Advanced” and click “Renew” next to Credentials.