

IIT Cognos Portal User Guide

Office of Institutional Research

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This document contains an introduction to the IIT Cognos portal and step-by-step instructions for logging in to Cognos, navigating to reports, and using the Cognos Connection to manage reports. The functionality described in this guide is available to all Cognos users, including those with Viewer licenses.

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1. About this User Guide

This document contains an introduction to the IIT Cognos portal and step-by-step instructions for logging into Cognos, navigating to reports, and using the Cognos Connection to manage reports. The functionality described in this guide is available to all Cognos users, including those with Viewer licenses. More information about Cognos Connection can be found in the Cognos Connection User Guide, a link to which can be found on the Resources tab in the IIT Cognos portal.

2. About the Cognos Portal

The IIT Cognos Portal (aka “Cognos Connection”) allows users to access Cognos reports and launch the various Cognos tools for authoring reports and queries based on data stored in the SunGard Banner Operational Data Store (ODS) and Enterprise Data Warehouse (EDW).

Users of the Portal are assigned a role within the Cognos system. The role determines which tools (i.e., Query Studio, Analysis Studio, and Report Studio) the user has access to. Role assignment is based on a user having obtained the appropriate license and training to use a particular Cognos tool or set of tools. (See Section 2.0 of this document for more information about Cognos User Roles.)

Data required to run and author reports is made available through various data packages (ODS) and data cubes (EDW). Security access to these SunGard Banner packages and cubes determines which data a user has access to. In order for a report to be visible to a user in the Cognos portal, the user must have security access to the folder in which the data package or data cube that was used to create the report is stored.

The IIT Cognos Portal is organized into four distinct tabs: My Folders, Report Libraries, Shared Reports and Resources. This document describes the Cognos user roles and how to use the four portal tabs. It also includes step-by-step instructions for running and viewing reports, changing the order of the tabs, changing your view preferences for each tab, deleting files from the tabs, creating and deleting folders, creating and deleting shortcuts, scheduling reports to run automatically, and viewing your report schedules. For information about how to use the Cognos report authoring tools, consult the appropriate user guide. Links to the user guides can be found on the Resources tab in the Portal (described in Section 7.4 below).

3. Cognos User Roles

IIT has established four Cognos user roles. Each role has access to different report tools. The roles are Report Viewer, Query User, Report Author and Report Librarian. These roles are combined with security access to data packages, cubes and folders to define a user's overall access to the system.

- **Report Viewer** - Can only run and view existing reports and queries. Users with this role do not have access to the Cognos report authoring tools needed to create new reports or queries.
- **Query User** – Has access to Query Studio, Report Studio Express and Analysis Studio. Users with this role can create queries and reports in Query Studio and Analysis Studio.
- **Report Author** – Has access to Report Studio, Query Studio and Analysis Studio. Users with this role can create queries and reports with any of these tools.
- **Report Librarian** – Has access to the same tools as a Report Author (i.e., Report Studio, Query Studio and Analysis Studio) but also has write access to the Cognos Report Libraries.

The Report Librarians perform tasks such as saving reports to the Report Libraries, developing and storing new reports for the university in the Report Libraries, and managing the content of the Shared Reports tab. More information about security access to data packages and cubes can be found in Section 4.0 of this document. A link to the MS Excel file containing the identify of the Report Librarians and the data packages assigned to each librarian is available on the Cognos Portal Resources tab (described in Section 7.4 below).

4. Obtaining a Cognos License

IIT has contracted with Cognos for an unlimited number of Cognos Viewer licenses. Therefore, Cognos Viewer licenses are available at no additional charge to a department. If a department wishes to purchase a Cognos authoring license, a person with budget authority in the department should send an email to the IIT Office of Technology Services (OTS) Support Desk (support@iit.edu) to request additional Cognos licenses. The email should include the type of license (i.e., Report Studio or Query/Analysis Studio), the name of the user for each license, and the fund, organization, account and program (FOAP) codes to which the licenses are to be charged.

5. Access to Data Packages and Cubes

Security access to data packages from the Banner Operational Data Store (ODS) and data cubes from the Banner Enterprise Data Warehouse (EDW) is obtained by request to the Data Security Team. A link to a file containing the identity of the Data Security Team members is available on the Cognos Portal Resources tab (described in Section 6.4 below).

Section 6.0 describes the responsibilities of IIT Employees who have access to IIT administrative data.

6. Confidentiality (FERPA) Guidelines & Responsibilities of IIT Employees

The guidelines set forth below define the responsibilities of every person who accesses and manages administrative data for IIT. Offices may have individual guidelines that supplement, but do not supplant or contradict, the guidelines set forth below. Data entrusted to IIT by other organizations (e.g., testing companies, lenders, and government agencies) is governed by terms and conditions agreed upon with those organizations. Specific issues not governed by such agreed upon terms shall be governed by the guidelines set forth below.

6.1. Confidentiality Guidelines

In accordance with the 1974 Family Education Rights and Privacy Act (FERPA), and to ensure maximum safeguards against indiscriminate distribution of information contained in students' records, only authorized IIT personnel will disclose information of a confidential nature (i.e., information not normally available to the general public). This information may be disclosed only to the student himself or herself, to a parent or guardian claiming that student as a dependent (as demonstrated by providing a copy of the parent or guardian's most recent Federal income tax return), or to a third party upon receipt of a written release signed by the student.

Certain exceptions to this include IIT school officials¹ who have a legitimate educational interest² in the records, organizations conducting studies for educational and governmental agencies or offices in connection with the student's application for receipt of financial aid, governmental officials as identified by Public Law 93-380, and an appropriate official in response to a court order or subpoena. Without a signed release, the university can make only "directory information³" available for public use in campus directories and publicity of events, *and only if a student has not requested that his or her directory information not be released.*

6.2. Responsibilities of IIT Employees with Respect to Institutional Data

Employees must adhere to any applicable Federal and state laws covering storage, retention, use, release, and destruction of data. All department heads are responsible for ensuring that staff members in their department know what these laws require and adhere to these requirements.

Supervising administrators shall ensure a secure office environment with regard to all institutional information systems. Administrators shall validate the access requirements of

¹ School officials shall be deemed to include member of the IIT's faculty and administrative staff who have a legitimate educational interest in such records and other personnel whose duties involve establishment and maintenance of such records and development of institutional reports.

² A "legitimate educational interest" shall be deemed to mean having a direct involvement in establishing or reviewing a student's academic record or performance.

³ The following constitutes directory information: name of student, date and place of birth, dates of attendance at IIT, local address, phone number and email address of student, home address and phone number of student, positions held, place of employment, and extension number of students currently employed at IIT, department of specialization and educational level (undergraduate, non-degree-seeking student, graduate student in Master or Ph.D. program), membership in officially recognized campus organizations and on teams, offices held in such organizations, degrees earned and special awards and recognition given, photograph of student.

their staff according to job functions before submitting requests for the provision of data access on behalf of their staff. Except as described in the Confidentiality Guidelines set forth in Section 5.1 above, under no circumstances shall anyone use institutional electronic data (in detail or summary) in any publication, seminar, or professional presentation, or otherwise release data, in any form, outside the university without prior written approval from an appropriate security officer. Data should never be left on any system to which access is not controlled.

Electronic data are owned by the university and are vital assets. All institutional data, whether maintained in the central database or copied into other data systems, including personal computers, remain the property of IIT. Access to data is not approved for use outside an individual's office university responsibilities. Computerized institutional data shall be used only for the legitimate business of IIT. Institutional computing services and facilities shall be used only as required in the performance of job functions.

As a general principle of access, university data (regardless of who collects or maintains it) shall be shared among those employees whose work can be done more effectively by knowledge of such information. Although the university must protect the security and confidentiality of data, the procedures to allow access to data must not unduly interfere with the efficient conduct of university business.

All information systems owned by IIT shall be constructed to assure that:

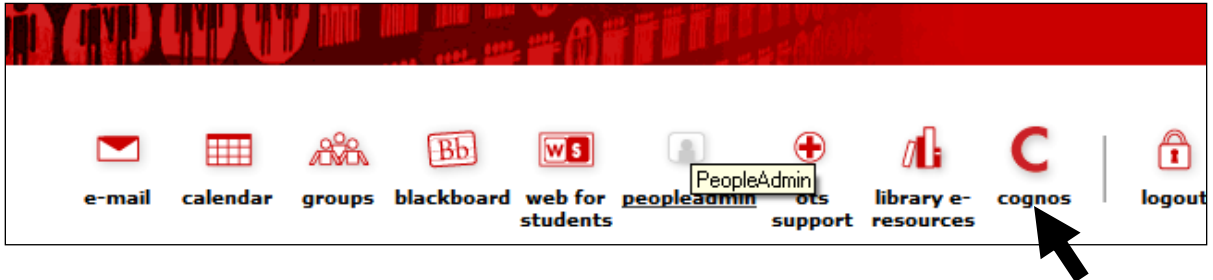
1. Accuracy and completeness of all system contents are maintained during storage and processing.
2. System capabilities can be re-established within an appropriate time after loss or damage by accident, malfunction, breach of security, or natural disaster.
3. Actual or attempted breaches of security can be detected promptly and controlled.

All who use IIT administrative data have the right to expect the data to be accurate.

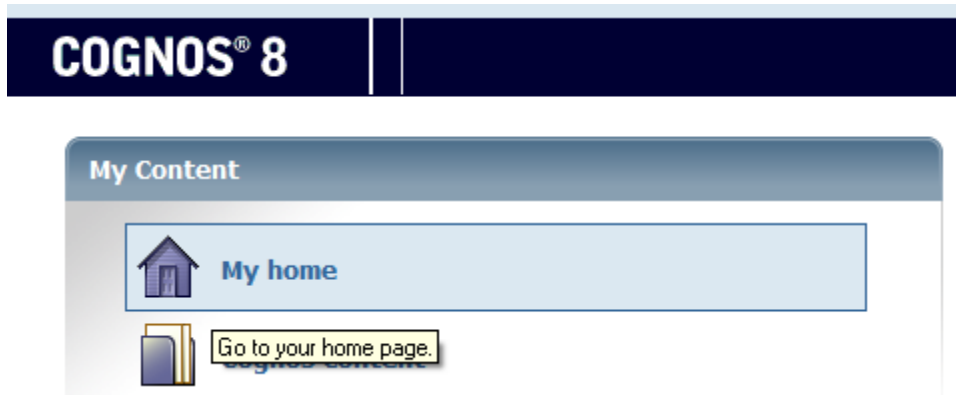
7. Logging in to Cognos

Users who have been granted access to one or more of the Cognos suite of tools (i.e., Viewer, Query Studio, Analysis Studio, or Report Studio) can log into Cognos through myIIT.

1. Click the Cognos icon  at the top of the screen.



2. On the Cognos 8 Welcome Screen (pictured below), select My home.



3. You are now in the Cognos Portal. You should see the four tabs pictured below:



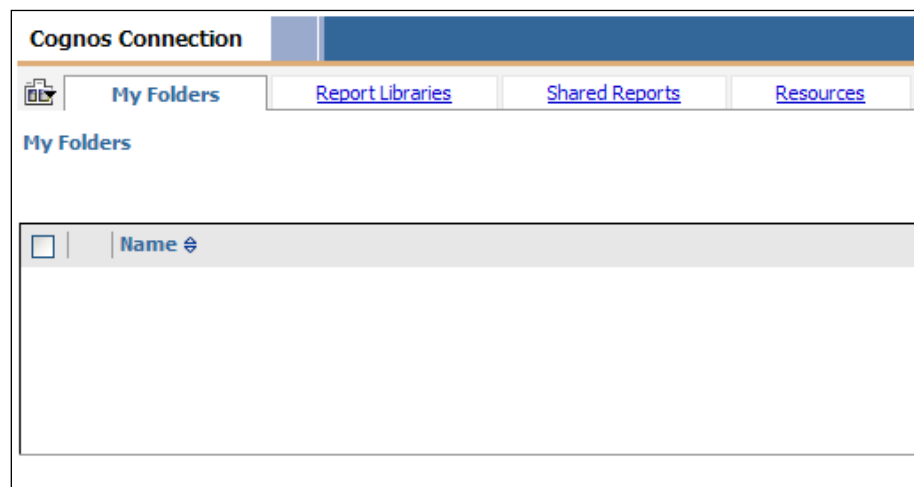
A discussion of how to use each of the four tabs can be found in Section 7.0 below.

8. How to Use the Cognos Portal Tabs

8.1. My Folders


The My Folders tab is a private tab that only the logged-in user has access to. This tab is to be used to store report queries created by the user. It can also be used by report authors and report viewers alike to save shortcuts to other reports and save any other personal content desired. *However, to maintain the performance of the Cognos server, users are strongly encouraged to save the output of report queries to another server.* To protect the confidentiality of data, users are not to save data that contains individual identifying information on their desktop or laptop computers. (See Section 5.0 for a discussion of data confidentiality and the responsibilities of IIT employees.)

Users may create folders to further organize the items stored in My Folders. (See Section 8.2 for step-by-step instructions for creating folders.) Users may also add channels to or create a dashboard on their My Folders tab, or on a new tab created by the user. (See the Cognos Connection User Guide for step-by-step instructions for adding channels to existing tabs, adding new tabs, and creating dashboards.)



8.2. Report Libraries

Report Libraries is a public tab that contains a library of official University reports. The tab contains two channels: a Cognos Navigator channel on the left and a Cognos Viewer channel on the right. The Cognos Navigator channel is used to locate a report. Once the report is located, clicking on the report name will cause the report to run and the output to be viewed in the Cognos Viewer channel on the right.

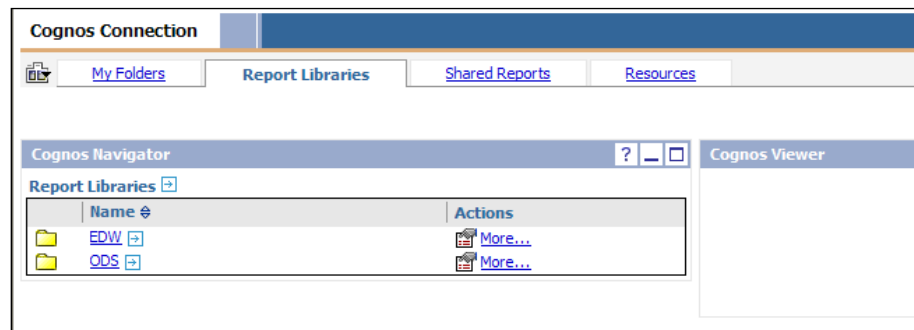
Tip: Viewing report output in the Cognos Viewer channel is a convenient way to see what information a report contains. If you need to change a report parameter, and re-run the report, it is better to run the report using the “Run with options” button  in the list of Actions to the right of the report name. This will open the report output in a separate window for viewing.

The Cognos Navigator channel is organized into folders. At the top level, there are two folders: ODS and EDW. Currently, only the ODS is available for use, so there are no reports stored in the EDW folder.

At the next level are subfolders named according to the ODS data package or EDW cube that is the source of the report data. Access to these subfolders (and the reports they contain) is controlled through Cognos security. Only folders, and the reports therein, to which the user has been granted security access can be viewed by the user.

Users can run reports from this location but they cannot edit the reports. The report Librarian is responsible for managing the reports in the Report Libraries. Report Librarians are the only ones able to save reports to this location. If a report author needs to save a report for personal use it should be saved to the My Folders tab. If the report will be shared with other users that have access to the same data package, the report should be saved to the Shared Reports tab.

Report authors may copy reports from the Report Libraries to their My Folder or the Shared Reports tab (see Section 8.9 below), and edit the reports there. All users may create shortcuts on their My Folder tab to reports in the Report Libraries (see Section 8.6 below).

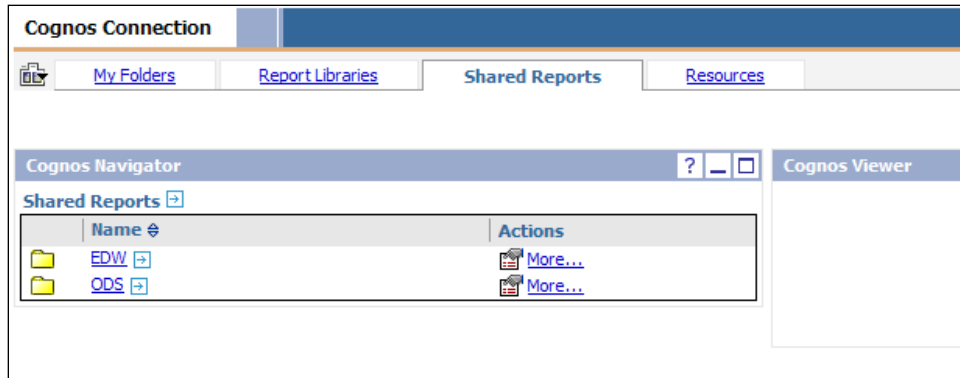


8.3. Shared Reports

Shared Reports is a public folder that allows report authors to share reports with other users. This tab is organized in the same manner as the Report Libraries tab (described in Section 7.2 above). There are two channels: a Cognos Navigator channel and a Cognos Viewer channel. In the Cognos Navigator channel the reports are organized into folders and subfolders, and the subfolders are named according to the ODS package or EDW cube stored in that folder. **Report authors are asked to save reports that use a particular data package or cube in the folder with the same name.** This is necessary to protect the security of the data in these reports.

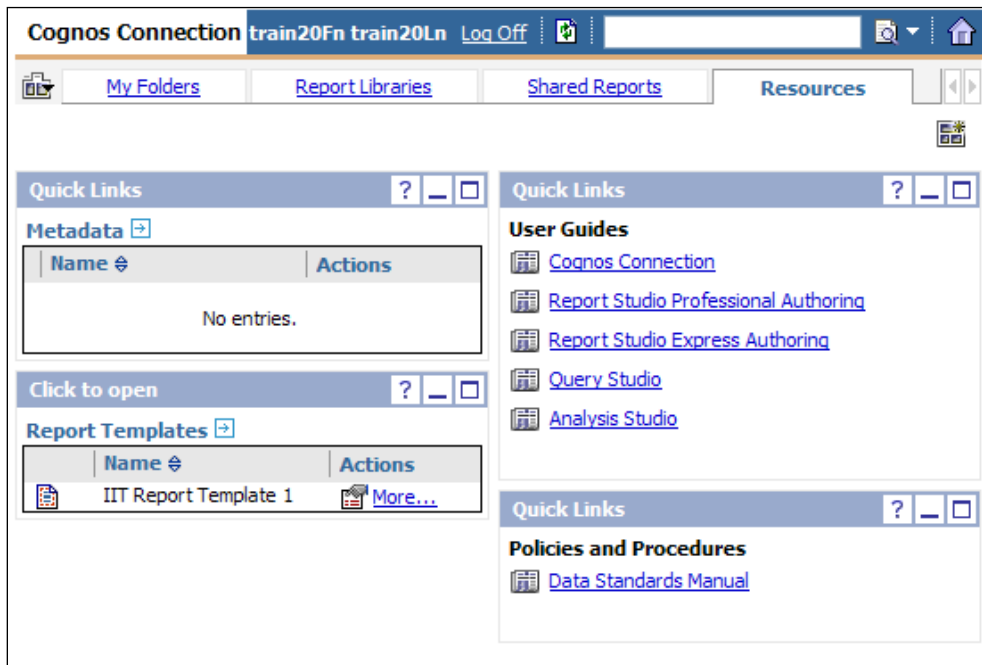
The subfolders to which a user has access (and thus the reports which the user can see and run) is controlled through Cognos security. Only folders to which the user has been granted access can be viewed by that user. In order for another user to access a report in this tab, that other user must have access to the folder in which the report is saved.

The main difference between the Shared Reports tab and the Report Libraries tab is that the report authors create and manager the contents of the Shared Reports tab. This is done by the Report Librarians for the Report Libraries tab.



8.4. Resources

Resources is also a public folder that provides access to the Data Dictionary, Cognos User Guides, Report Templates, and Policies & Procedures for data access and reporting. The content of this tab is controlled by the university and cannot be edited by users.



9. Step-by-Step Instructions for Using the IIT Cognos Portal

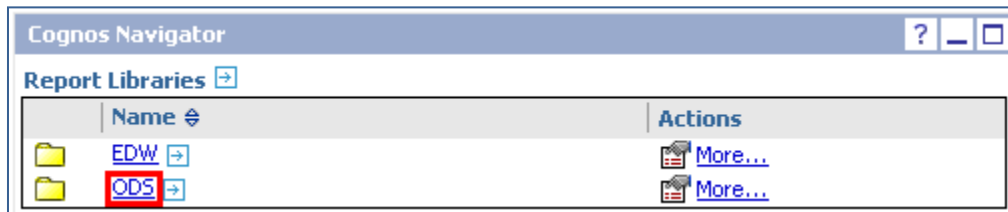
9.1. Running a Cognos Report

To find a report, you must know the tab that the report is saved on (either Report Libraries or Shared Reports) and the subfolder name. The subfolders in Cognos are named to agree with the name of the data package each contains (see Section 7.3 above).

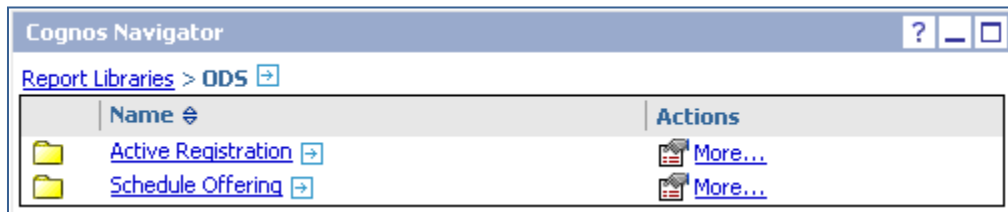
In Cognos a report can be based on only a single ODS data package or EDW data cube. Because Cognos security is at the folder level (see Section 7.2 for more information about folder security), report authors are asked to save their reports in the subfolder that has the same name as the data package or cube used to create the report. For example, a report written using the ODS Active Registration data package would be saved in the ODS/Active Registration subfolder. This will limit access to this report to users who have security access to the subfolder in which it is saved.

To run a Cognos report:

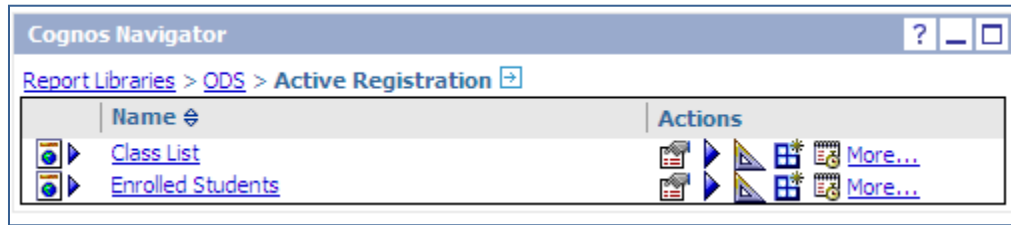
1. Select either the Shared Reports or the Report Libraries tab. Whichever one of these two tabs you selected, you should see a channel labeled Cognos Navigator on the left and another channel labeled Cognos Viewer on the right.
2. In the Cognos Navigator channel, you will see two folders: EDW (Enterprise Data Warehouse) and ODS (Operational Data Store). At the current time, the only data repository that is available is the ODS. Open the ODS folder by clicking on ODS.



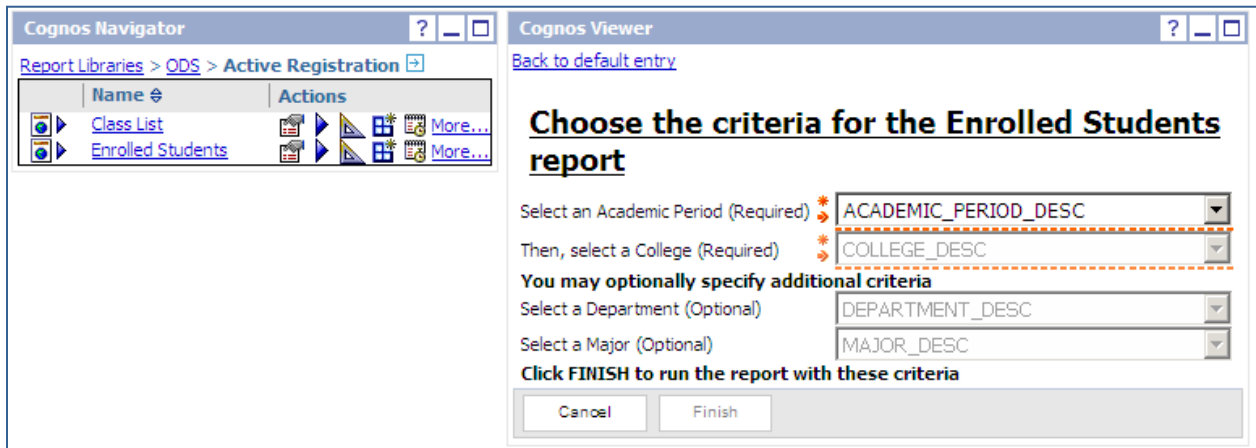
3. A number of subfolders will appear in the Cognos Navigator channel. You have minimally been authorized to access one secured subfolder within the ODS. It is possible for you to have been given access to more subfolders, depending on your role at the university and the security access you have been given. Click on the name of the folder that contains the report you wish to run.




4. Now you will see a list of reports in the Cognos Navigator channel. Click the name of the report you would like to view. The selected report will display in the Cognos Viewer channel on the right side of the screen.



5. Depending on how the report is written, you may be asked to select one or more parameters for running the report.

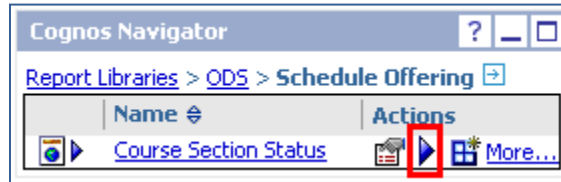


Hint: Viewing report output in the Cognos Viewer channel is a convenient way to see what information a report contains. If you need to change a report parameter, and re-run the report, it is better to run the report using the “Run with options” button () in the list of Actions to the right of the report name. This will open the report output in a separate window for viewing.

9.2. Printing a Cognos Report

To print the report or download the report to Excel:

1. Click the “Run with options” button ().



2. A list of format options will appear. These are explained below. Select the format you require from the pull down list.

HTML	Displays as a web page in a browser.
PDF	Displays as an Adobe PDF which you can save locally and print.
EXCEL*	Saves the output in MS Excel format. Select the version that most closely relates to the EXCEL application you have on your local computer. You will be asked if you want to Open or Save the document. Select either one.
CSV	Saves the output in comma-separated value format. You will be asked if you want to Open or Save the document. Select either one.
XML	Displays the XML code in the browser window.

* See instructions at end of this section regarding configuring your browser for EXCEL.

(Continued on next page...)

3. Select one of the following two delivery options. **Do not select “Save the report” or “Print the report.”**
 - View the report now
 - Send me the report my email.

Run with options - Enrolled Students

Select how you want to run and receive your report.

Format:
HTML

Language:
English

Delivery:

- View the report now
- Save the report
- Print the report

Printer location:
Select a printer...

Send me the report by email

Prompt values:
No values saved
 Prompt for values

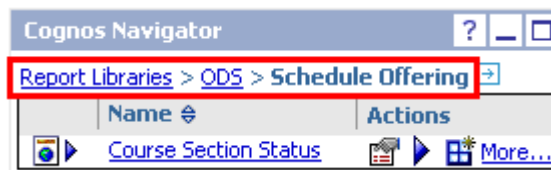
Run Cancel

To specify a time to run the report, or for additional formats, languages, or delivery options, use [advanced options](#).

Do not select the Deliver option “Save the report” as this will save the output to Cognos instead of displaying it.

Do not select the Deliver option “Print the report.” There no defined printers yet and this option cannot print to your local printer.

Hint: The bread crumb trail located at the top of the Cognos Navigator window will allow you to navigate between selected layers of folders. Click on the desired folder name within the bread crumb trail, such as ODS. The selected folder will open in the Cognos Navigator channel.



If you have any questions about accessing the Cognos portal or running reports, please contact Carol Emmons at emmons@iit.edu or Lee Elvart at elvart@iit.edu. If you have about the ODS or the ODS Data Dictionary, please contact a subject-matter expert for the data package you need to use. Other questions or problems should be submitted to the OTS support desk at supportdesk@iit.edu.


9.3. *Configuring your Browser to Run a Report in Excel*

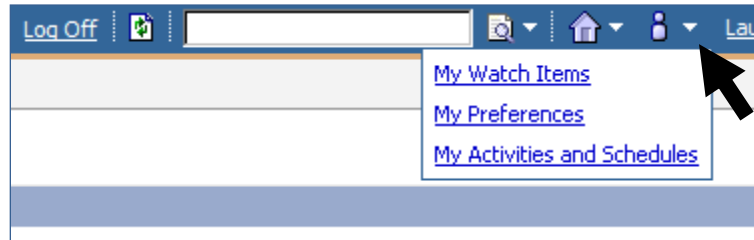
Exporting the output of a Cognos query to Excel requires an easy set-up in your Internet Explorer browser. Follow these steps one time and you will be set up for running reports in Excel:

1. In Internet Explorer – go to Tools, Internet Options, then Security.
2. Click on Trusted Sites – add “https://my.iit.edu” to your list of trusted sites.
3. Click on the “Custom Level...” button, then scroll down to “Downloads”; find “Automatic prompting for file downloads,” then click Enable.
4. Click OK, then OK again to save the settings. You will now be prompted to open or save (either one works) when running the report .

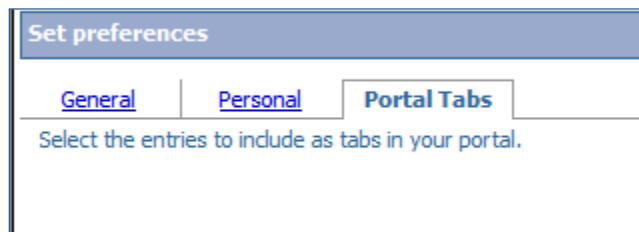
9.4. Modifying the Sequence of the Tabs in Your Cognos Portal

To modify the sequence or order in which the tabs appear in your Cognos Portal:

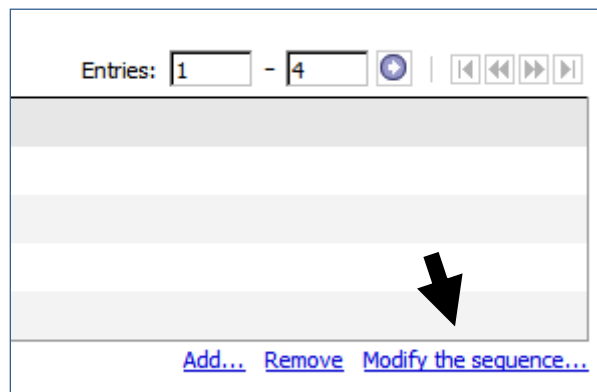
1. Click on the down arrow beside the My Area icon  to expand the My Area menu.



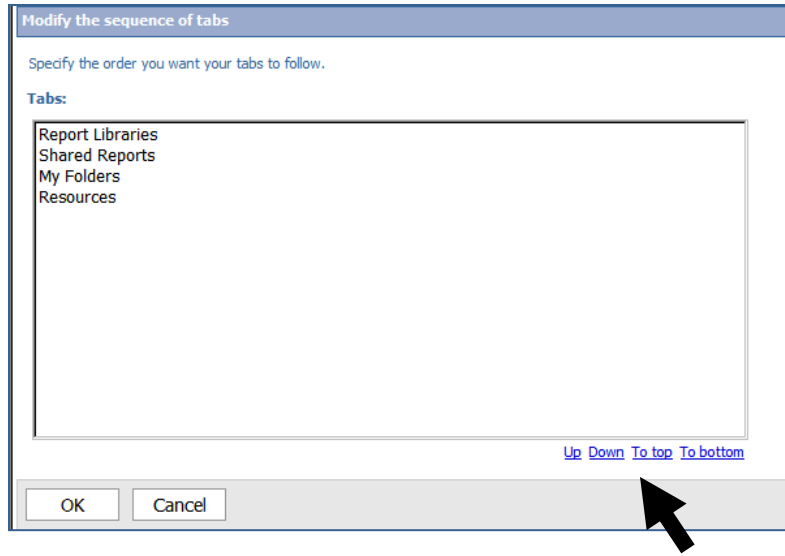
2. Click on My Preferences.
3. Open the Portal Tabs tab.



4. Click on Modify the sequence... in the lower right-hand side of the screen.



5. Highlight the tab you wish to move and use the Up, Down, To top, and To bottom buttons to change its position in the tab sequence.

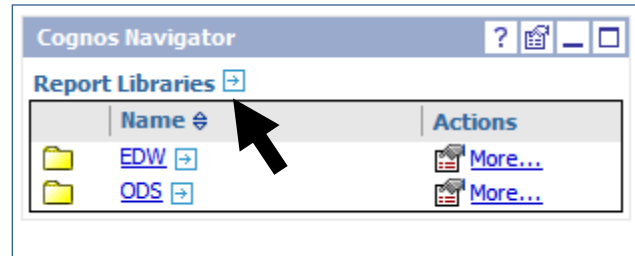


6. When the tab names appear in the desired sequence, click OK.

9.5. Creating a Folder in a Tab

To create a folder in Cognos Navigator channel:

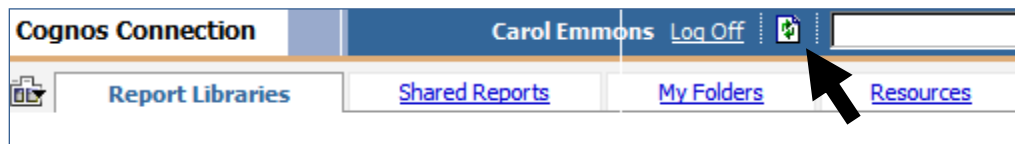
1. Under the Cognos Navigator channel, click on the arrow next to the channel name (e.g., Report Libraries). A separate window should pop up.



2. Click on the New Folder icon.



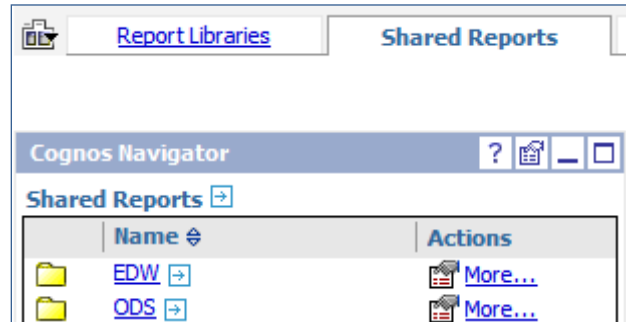
3. Enter the name of the new folder in the Name field.
4. Click Finish.
5. Click the Refresh icon on the top toolbar to see changes.



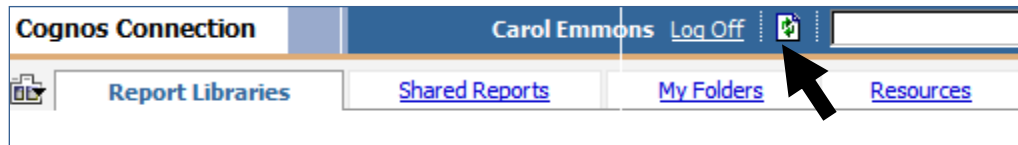
9.6. Deleting a Folder from a Tab

To delete a folder from a tab:

1. Under the Cognos Navigator channel, click on the More link next to the folder you wish to delete.



3. Click Delete.
4. Click OK.
5. Click the Refresh icon on the top toolbar to see changes.



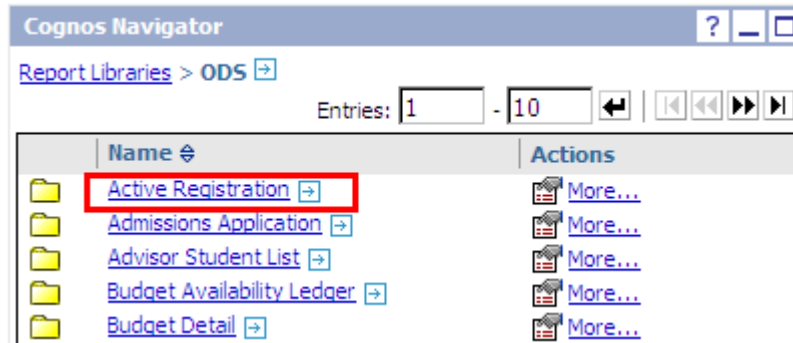
9.7. Creating a Shortcut in a Tab

To create a shortcut in the My Folders tab to a report in a different tab:

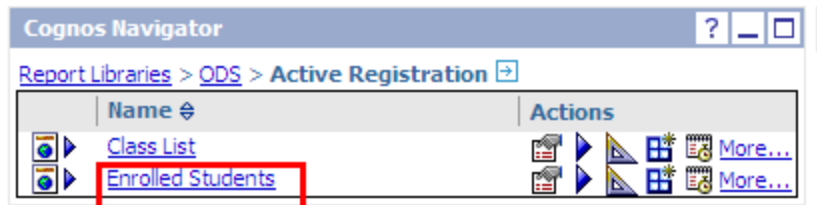
1. In the tab containing the report (either Report Libraries or Shared reports), open the ODS folder by clicking on it.



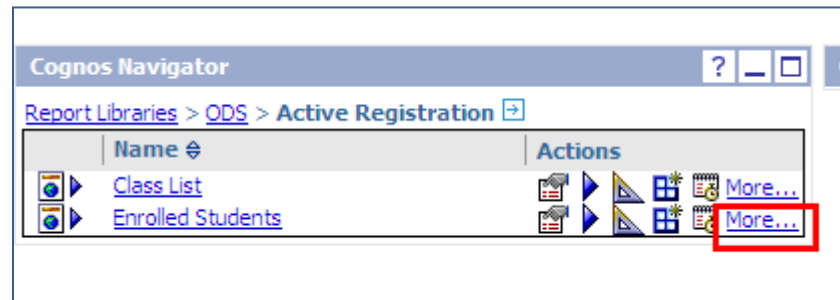
2. Select a subfolder.



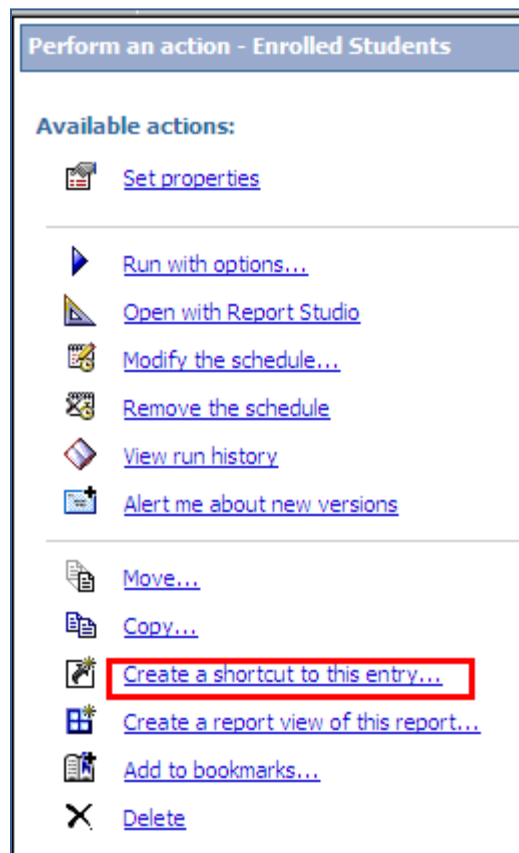
3. Find the report you want to create a shortcut to.



4. Click on the More link next to the report name.



5. Click on Create a shortcut to this entry in the Available actions menu.



6. Enter a name, screen tip and description for the short cut. Under Location, make sure that the breadcrumb is leading to My Folders, as in the picture below. If not, then Select another location and navigate to My Folders. Then click on Finish.

Specify a name and description - New Shortcut wizard

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

Name:
Shortcut to Enrolled Students

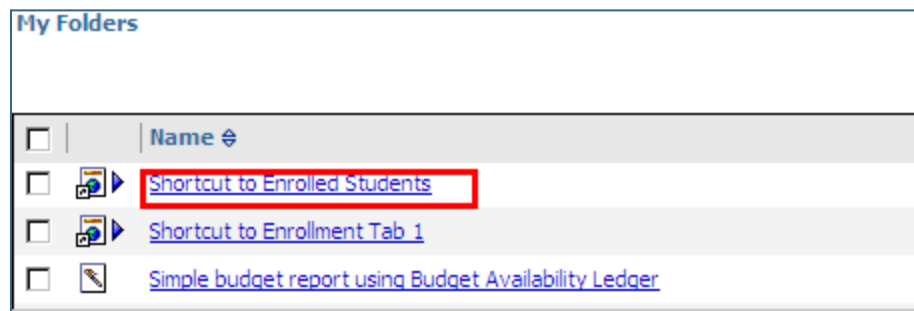
Description:

Screen tip:

Location:
Public Folders > Report Libraries > ODS > Active Registration
[Select another location...](#) [Select My Folders](#)

Cancel < Back Next > Finish

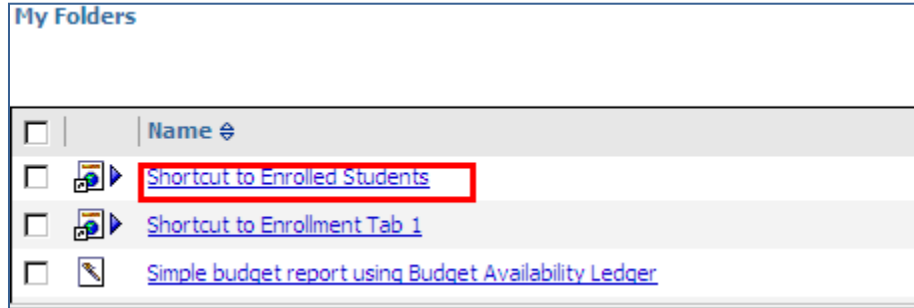
7. Click on the My Folders tab to see the shortcut.



9.8. Deleting a Shortcut from a Tab

To delete a shortcut in the Cognos Navigator channel in a tab:

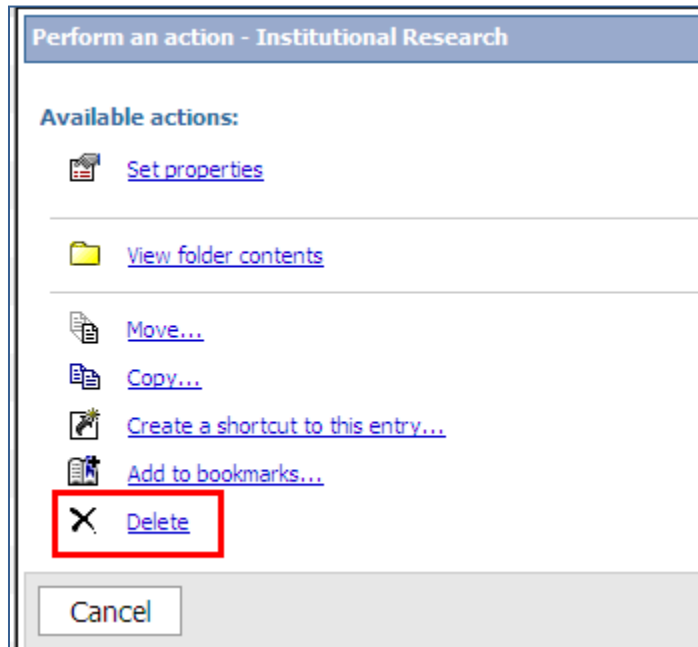
1. Under the Cognos Navigator channel, click on the shortcut.



2. Click on the More link to the right of the Shortcut to Test Report.



3. Click Delete from the Available actions menu.



4. Click OK.
5. Click the Refresh icon on the top toolbar to see changes.



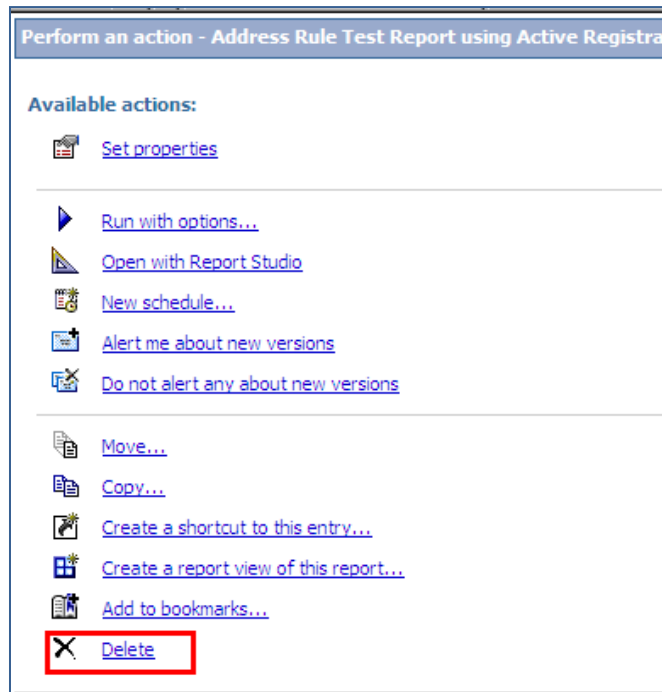
9.9. Deleting a Report from a Tab

To delete one report from a tab:

1. Click the More link to the right of the report you wish to delete.

Name	Modified	Actions
Address Rule Test Report using Active Registration	November 20, 2008 11:33:44 AM	More...
Budget Report based on Budget Availability Ledger	October 29, 2008 4:31:27 PM	More...
Credit Hours Taught by College Crosstab	August 28, 2008 1:11:41 PM	More...
Credit Hours Taught by Department	August 27, 2008 4:41:39 PM	More...

2. The Available actions menu will appear. Click on Delete.



3. Click OK.

To delete more than one report from a tab at the same time:

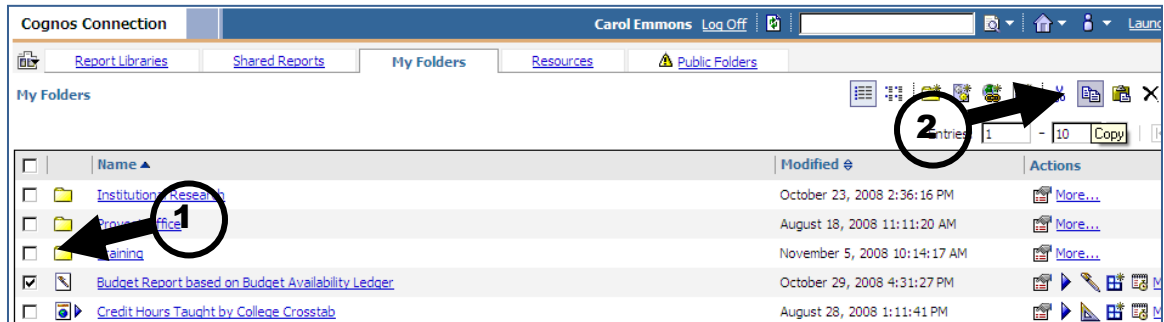
1. Select the boxes to the left of the reports you want to delete.

<input checked="" type="checkbox"/>		Race and Ethnicity of Currently Active and Registered Students
<input checked="" type="checkbox"/>		Report View of OpenPOV2
<input checked="" type="checkbox"/>		Report View of OpenPOV2 for 2101

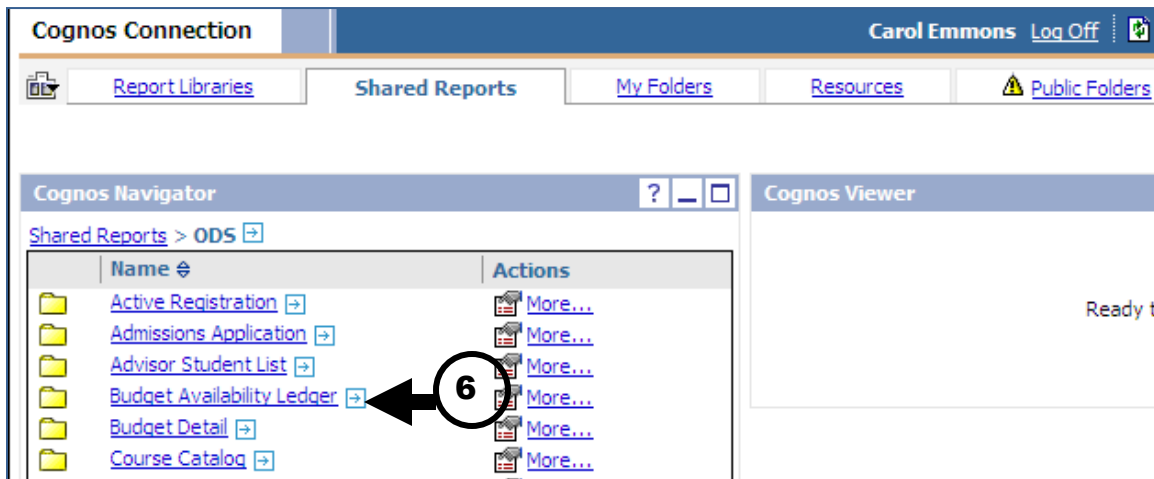
2. Then click the delete button () on the toolbar in the upper right side of the screen.

9.10. Copying a Report from My Folders to the Shared Reports Tab

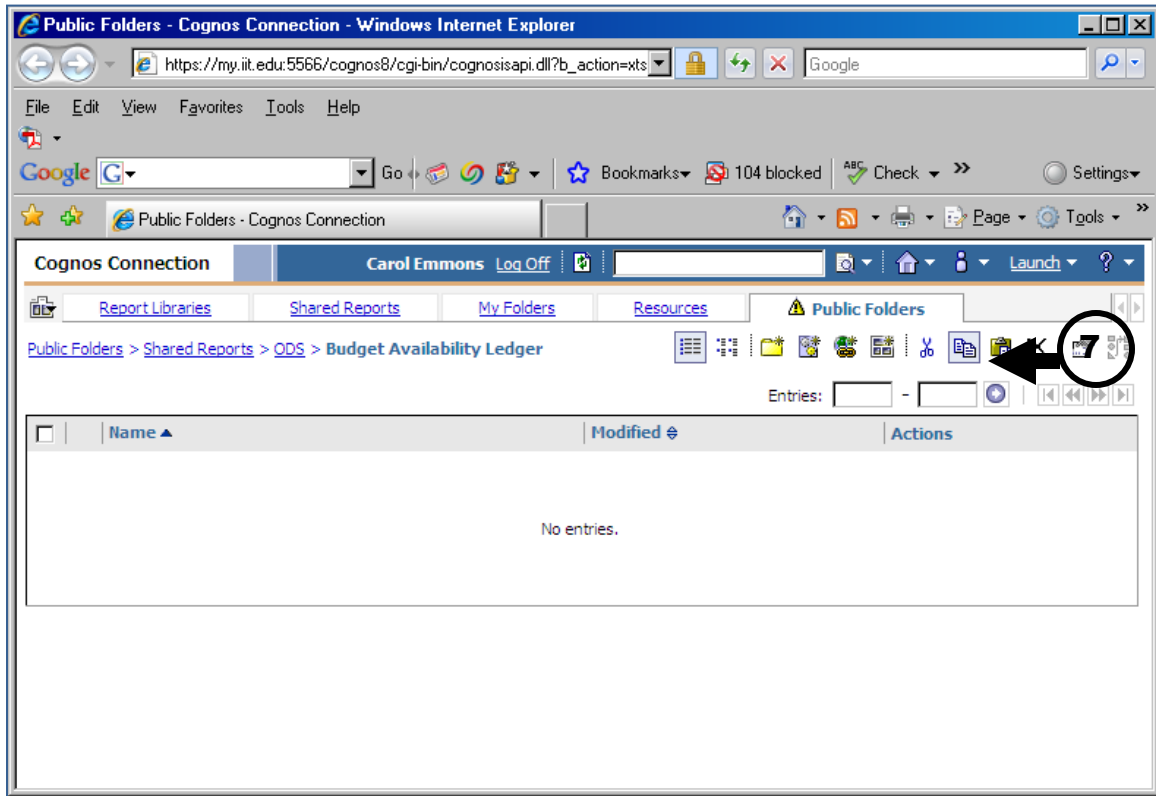
1. Check the box to the left of the report name on the My Folders tab.
2. Then click on the Copy icon on the toolbar in the upper right hand corner of the screen.



3. Click on the Shared Reports tab.
4. Click on ODS.
5. Navigate to the folder in which you want to paste the report. Open that folder.
6. To reveal the toolbar, click on the tiny arrow next to the folder name.



7. Click on the paste icon in the toolbar.

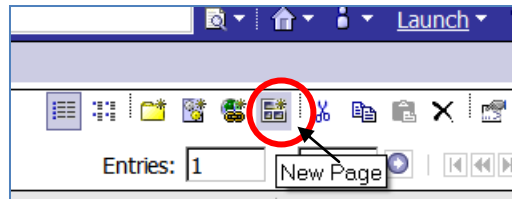


9.11. Adding a Tab to Your Cognos Portal

Additional tabs can be added to your Cognos Portal to help you organize your reports or search for content in the Public Folders (i.e., the Shared Reports and Report Libraries tabs). Adding a tab to your portal will not affect what other users see in their portals.

To add a tab:

1. Start by creating a new page within My Folders. To create a new page, click on the New Page icon. This icon appears in the toolbar in the upper right part of the screen.



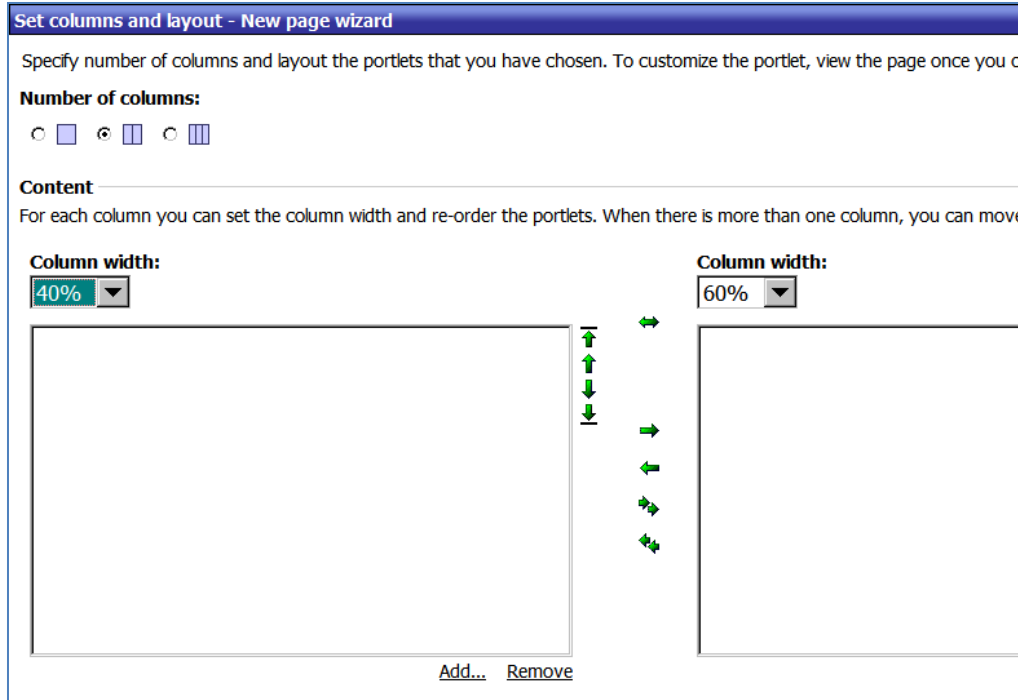
2. This will open the New Page Wizard. In the first screen of the New Page Wizard, specify a name and (if you wish) a description and screen tip for the new page. Then click Next >.

 A screenshot of the 'Specify a name and description - New page wizard' dialog box. The dialog has a title bar with the text 'Specify a name and description - New page wizard'. Below the title bar, there is a text area with the instruction: 'Specify a name and location for this entry. You can also specify a description.' The form contains the following fields:

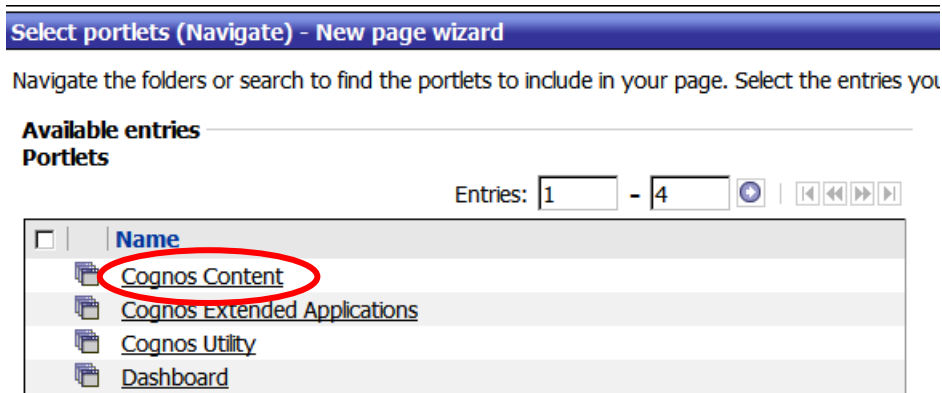
- Name:** A text input field containing the text 'Search & View'.
- Description:** A large text area with a vertical scrollbar.
- Screen tip:** A text input field.
- Location:** A section with the text 'My Folders' and two links: 'Select another location...' and 'Select My Folders'.

 At the bottom of the dialog, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

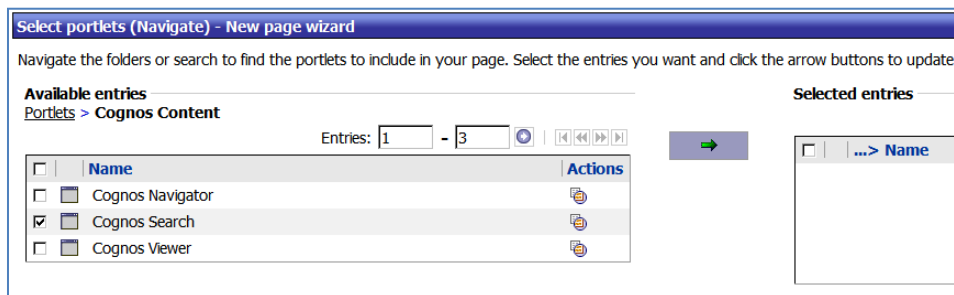
3. Next, set the columns and layout of the new page. First, select the number of columns you want on the page. Then, adjust the proportion of the page each column will occupy. (See image on next page.)



4. Add content to the page by clicking the Add... below each channel. From the list of available entries, select Cognos Content.



5. Select the type of portlet you would like on the left side of your page, then click the green right arrow. The name of the portlet type you selected should now appear in the Selected entries pane on the right side of the screen. Click OK.



6. Repeat steps 4 and 5 to add content to the right-hand portlet. This time, you may want to choose Cognos Viewer for the content.
7. Define the style of your new page by adding a title and (if you wish) instructions. Click Next>.

Set page style - New page wizard

Add a title and instructions which appear above the portlets on the page. You can also set the style of

Title:
Return to default >> Tahoma 12 **B** *I* U

Search & View
 Hide title on the page

Instructions:
Return to default >> Tahoma 11 **B** *I* U

Hide instructions on the page

Portlet Style
 Hide borders
 Hide title bars
 Hide Edit buttons on the title bar

Cancel < Back Next > Finish

8. In the last step of the New Page Wizard, select an action by checking the box to the left of “Add this page to the portal tabs.” Click Finish.

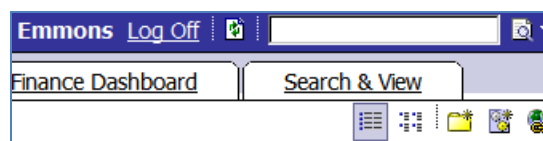
Select an action - New page wizard

The New Page wizard is ready to create the page you specified.

Action after closing the wizard:
 Add this page to the portal tabs
 View the page

Cancel < Back Next > Finish

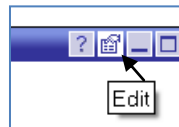
9. Your new tab should appear in the right-most position on the tab bar. Click on the new tab.



10. The portlet on the left will let you search for content by entering a character string. This is a useful way to search for reports. Try out the Advanced search options.

The screenshot shows a portlet titled "Search & View". Below the title bar, which says "Cognos Search", there is a search input field containing the text "course section". To the right of the input field is a magnifying glass icon. Below the input field is a dropdown menu labeled "Advanced". Above the search input field, there is a label "Search: Name field" with a small downward arrow.

11. To connect the Viewer portlet on the right with the Search portlet on the left so that you can view the reports you select in the Search portlet, first edit the Viewer portlet by clicking on the Edit button on the title bar of the portlet.



12. In the Set Properties dialog box, enter a channel name for this portlet. The channel name cannot contain any spaces or special characters. Click OK.

The screenshot shows a dialog box with the following content:
Channel:
 Specify a channel name for this portlet if you want to enable it to be a receiver of actions from other portlets.
 Below this text is a text input field containing the word "Viewer".

13. Now edit the Search portlet. In the Set Properties dialog box, set the Open links to "In a destination portlet:" and enter the channel name that you gave the Viewer portlet. Click OK.


The screenshot shows a dialog box with the following content:
Open links:
 In a new browser window
 In the current window
 In a named HTML frame:
 [Empty text input field]
 In a destination portlet:
 The channel name given to the Cognos Viewer.
 [Text input field containing "Viewer"]

14. Now the two portlets are connected, and content selected in the Search portlet can be viewed in the Viewer portlet.

9.12. Scheduling a Report to Run Automatically

In Cognos Connection, you can schedule a report to run on a regular basis in the future or just one time in the future. It is also possible to create a job - consisting of several reports - and schedule the job to run just one time or on a regular basis. Instructions for scheduling a report to run on a regular basis appear below. Instructions for scheduling a report to run just one time in the future begin on page 33. Instructions for creating a job appear in Section 8.12.

To schedule a report to run automatically on a regular basis (e.g., monthly) in the future:

1. Click the “New schedule” icon () under the list of Actions to the right of the report name. If you do not see this icon, click on the “More...” link.
2. Set the priority, start and end dates and times, and frequency.

Schedule - Currently Registered Students who live in Ottawa IL

Schedule this entry to run at a recurring date and time. You can run using the default values or specify the options. You can disable the schedule without

Disable the schedule

Priority:

Start:

Frequency:
Select the frequency by clicking on a link.

[By Day](#) [By Week](#) [By Month](#) [By Year](#) [By Trigger](#)

The of every month(s)

Day of every month(s)

Options

Override the default values

Formats:
Default

Languages:
Default

Delivery:
Save the report

Prompt values

Override the default values
No values saved

3. If you check the “Override the default values” box, a new screen will open:

Options

Override the default values

Formats:

Number of rows per Web page:

Enable selection-based interactivity

PDF
No options saved
[Set...](#)

Excel 2007

Excel 2002

Delimited text (CSV)

XML

Languages:
English [Select the languages...](#)

Delivery:
Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.

Save:

Save the report

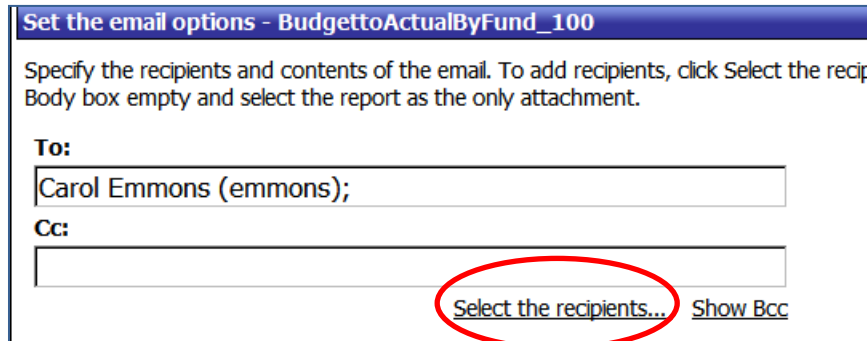
Save the report as a report view [Edit the options...](#)
--> Report View of Race and Ethnicity of Currently Active and Registered Students

Print the report

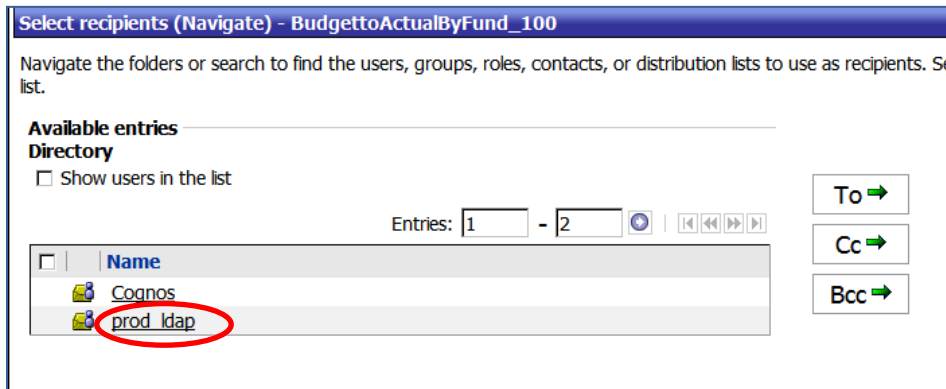
Printer location:
 [Select a printer...](#)

Send a link to the report by email [Edit the options...](#)
Carol Emmons (emmons)

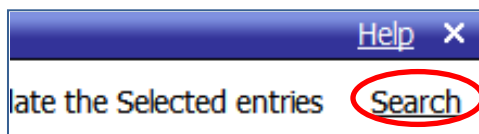
4. Set the email options. If you want the report emailed to someone besides yourself, click on the “Select the recipients....” link.



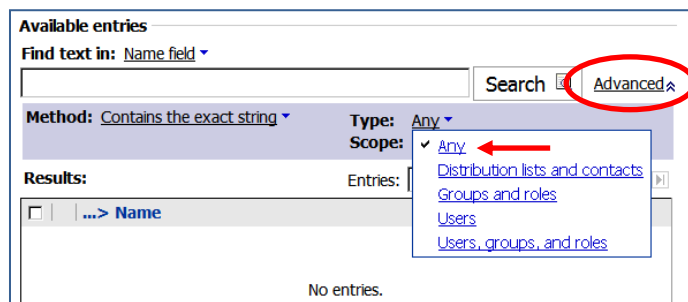
5. Click on prod_idap. This will open a new window.



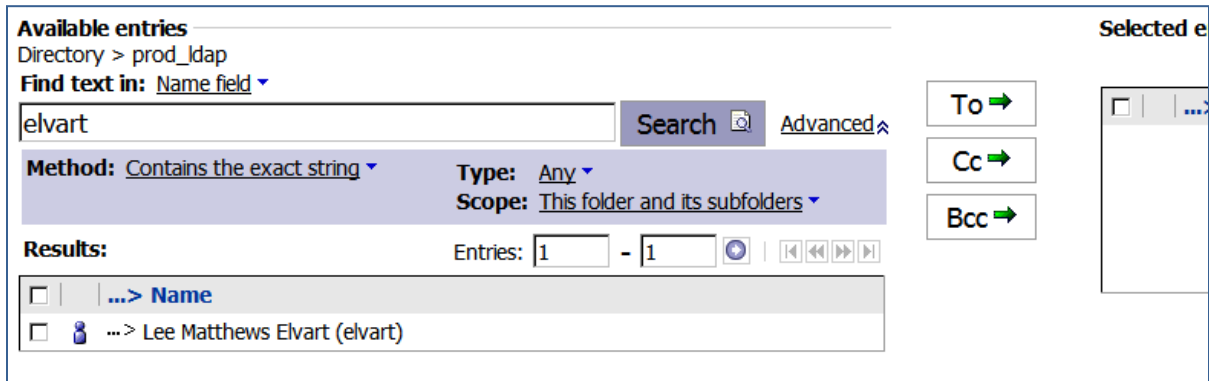
6. Click on “Search” in the upper right-hand corner of the screen.



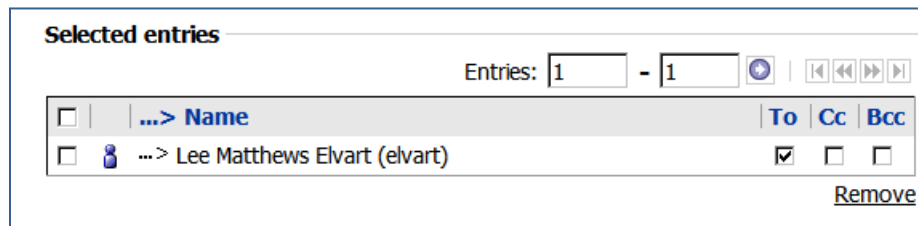
7. Click on “Advanced” to the right of the Search button. Then select click the down arrow for Type and select “Any.”



- Enter part of the user’s name who you wish to email the report to. Then click on Search. Names matching the string you entered should appear in the Results: pane.

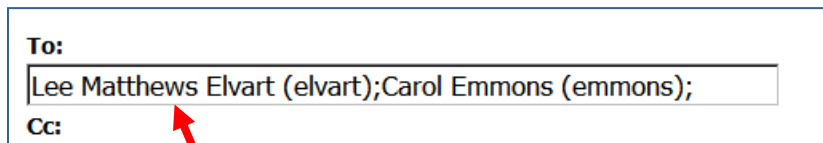


- Locate the correct name from list. Check the box to the left of the name, and then click on the **To** button in the center of the screen.
- The name you selected should now appear in the Selected entries pane. If this is the person you want, click OK.

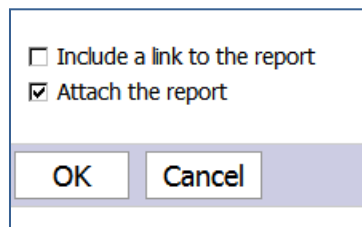


If you selected the wrong name by mistake, you can remove it by first checking the box to the left of the name and then clicking on “Remove.”

- You should now see the new person’s name added to the “To” pane:



- If you want to attach the report to the email (rather than emailing a link to the report), check box to the left of “Attach the report.” Then click OK.



- If it is a prompted report, you will need to set the prompt values. To do that, click the box next to “Override the default values,” and then click on the “Set...” Link. A new screen will open.

Prompt values

Override the default values

No values saved

[Set...](#)

- Select the values you want to use for the prompts, and click Finish.
- Click OK on the next three screens.

To schedule a report to run just one time in the future, use “Run with options,” rather than “New schedule:”

- Click “Run with options...” A new screen will open.

Run with options - BudgettoActualByFund_100

Select how you want to run and receive your report.

Format:

PDF
HTML
PDF
Excel 2007
Excel 2002
Excel 2000 Single Sheet
Delimited text (CSV)
XML

Save the report

Print the report:

Printer location: [Select a printer...](#)

Send me the report by email

Prompt values:
FiscalPeriod: 'August 31', FiscalYear: '20... [View all](#)

Prompt for values

- Select the format.
- Select the delivery. If you want the report sent to you by email, check the “Send me the report by email” option.
- If you want the report attached to the email (rather than a link to the report sent in the email), click the “advanced options” link on the right side of the screen. This will open a new window.

Time and mode:

View the report now

Run in the background:

Now

Later:

5. Select “Run background” and “Later.” Then, set the date and time that you want the report to run. Remember that the ODS usually finishes refreshing by about 6:30 am.
6. Check “Send report by email” and then click on “Edit the options...”

Delivery:
Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.

Save:
 Save the report
 Save the report as a report view [Edit the options...](#)
 ...> Report View of BudgettoActualByFund_100

Print the report

Printer location:
 [Select a printer...](#)

Send the report by email [Edit the options...](#)
Carol Emmons (emmons)

16. If you want to attach the report to the email (rather than including a link to the report in the email), uncheck “Include a link to the report” and check “Attach the report.”


Include a link to the report
 Attach the report

17. Click OK.
18. Click Run.

9.13. Creating a Job

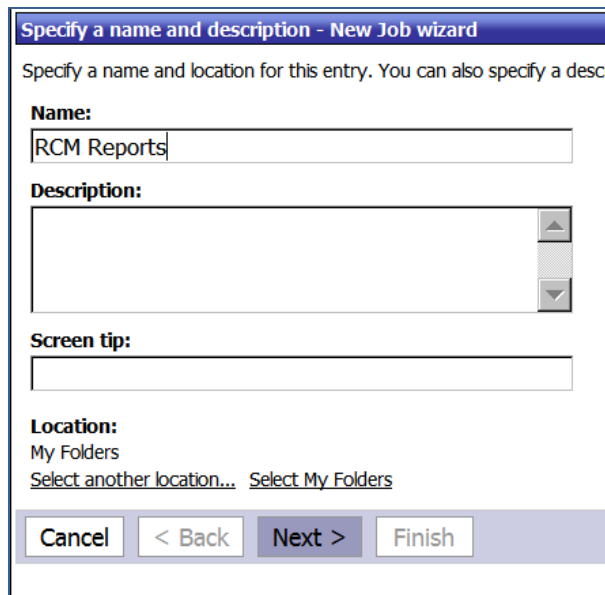
A job is a set of reports that are scheduled to run at the same time. Jobs can be run in real time, scheduled to run just one time in the future, or scheduled to run on a regular basis.

To create a job:

1. Select the New Job icon from the toolbar in the upper right portion of the tab (see image below). If you are in the My Folders tab, this toolbar is always visible. In the Shared Reports and Report Libraries tabs you must first click on the tiny blue arrow  to the right of the title in the Navigator portlet.



2. This will open the New Job Wizard. In the first step of the wizard, give the job a name. Then select the location where the job will be saved. Then click Next >.



Specify a name and description - New Job wizard

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

Name:
RCM Reports

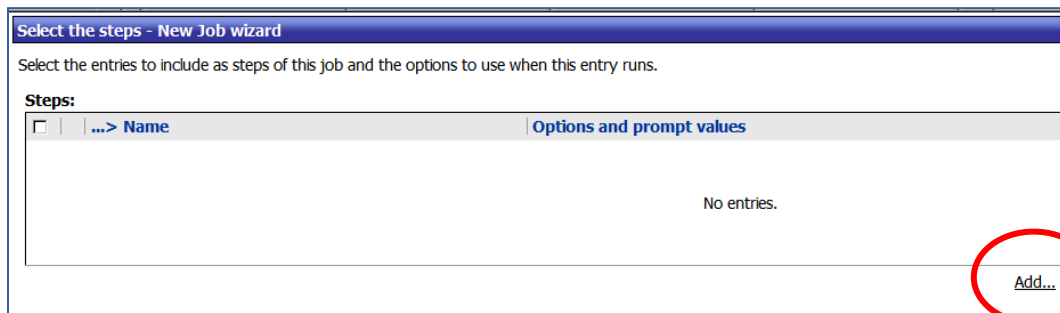
Description:
[Empty text area]

Screen tip:
[Empty text area]

Location:
My Folders
[Select another location...](#) [Select My Folders](#)

Buttons: Cancel, < Back, **Next >**, Finish

3. In the second step of the wizard, add the reports to the job by clicking on the Add... link below the Steps pane.



Select the steps - New Job wizard

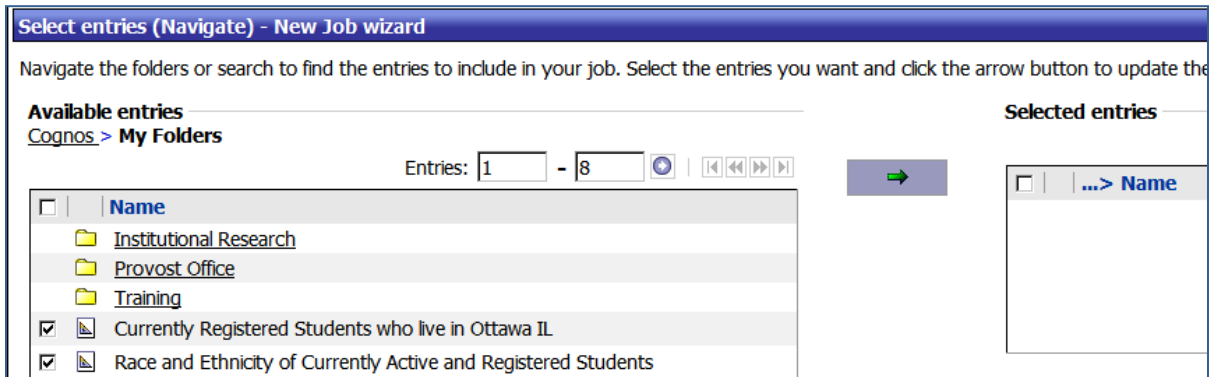
Select the entries to include as steps of this job and the options to use when this entry runs.

Steps:

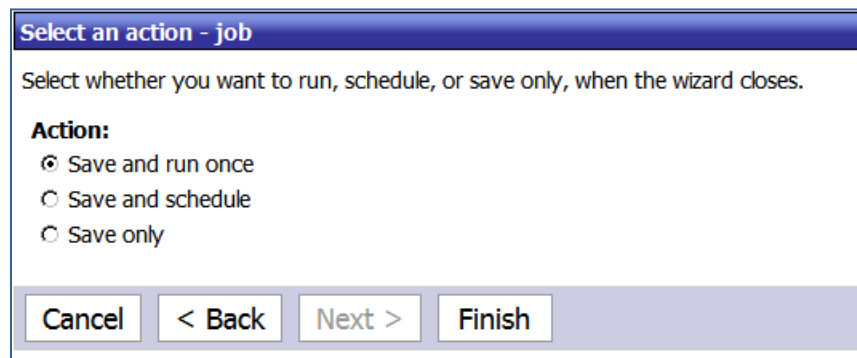
<input type="checkbox"/>	...> Name	Options and prompt values
No entries.		

[Add...](#)

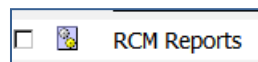
- Check the boxes to the left of the reports you want added to the job. Then click the green right arrow in the center of the screen. This will add the reports to the “Selected entries pane. When you are finished adding reports, click OK.



- Now specify the submission of steps and the defaults for all steps. Click Next.
- Finally, select an action for the job. Then click Finish.




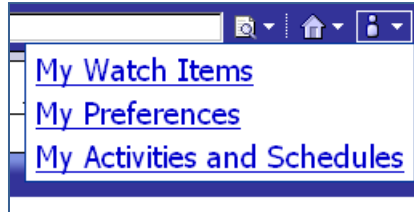
- You should see your new job in the tab where you saved it.



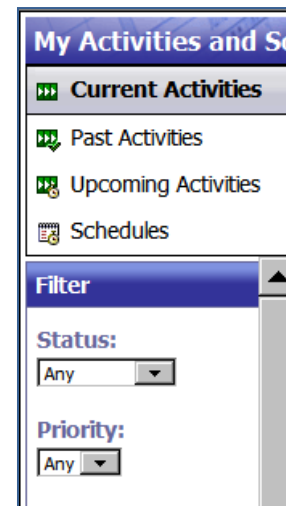
9.14. Viewing Your Report Schedules

To view your report schedules:

1. Click on the My Area [] button on the blue navigation bar near the top of the screen.




2. Click on “My Activities and Schedules.” A new window will open.
3. Select “Schedules.”
4. Filter the selection based on Status or Priority.
5. The scheduled reports that meet your filter criteria will appear in the “Schedules” pane (see below).



6. Use the toolbar in the upper right-hand corner of the “Schedules” pane to show details or hide details of the report, enable, disable, or change the priority of the scheduled reports.

Name	Modified	Status	Priority
<input type="checkbox"/> BudgettoActualByFund_100	November 6, 2009 11:30:00 AM	Enabled	3
<input type="checkbox"/> Race and Ethnicity of Currently Active and Registered Students	November 6, 2009 10:15:23 AM	Enabled	3
<input type="checkbox"/> Tab 10 Grad Heads by Student Population & College	September 22, 2009 9:43:26 AM	Disabled	3
<input type="checkbox"/> BudgettoActualByFund_290	September 11, 2009 4:49:30 PM	Enabled	3
<input type="checkbox"/> Org4ActivitybyFund_280	September 11, 2009 4:47:01 PM	Enabled	3
<input type="checkbox"/> BudgettoActual_280	September 11, 2009 4:45:51 PM	Enabled	3
<input type="checkbox"/> BudgettoActualByFund_280	September 11, 2009 4:44:26 PM	Enabled	3
<input type="checkbox"/> Org4ActivitybyFund_262	September 11, 2009 4:39:47 PM	Enabled	3

7. Click on the Return () button on the blue navigation bar near the top of the screen to return to the portal tabs.