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Introduction

With the release of the KFS 7 upgrade, Cognos version 11 (henceforth known as Cognos Analytics) will be simultaneously released to campus users. Reports run in Zot!Portal will automatically run in Cognos Analytics starting on February 20th, 2018. Users who develop their own reports through the Cognos specific portal (Cognos Connection) will need to validate their reports (and packages if necessary), in the new Cognos Analytics environment by April 30th, 2018. Transition training will be provided for those interested in validating their reports and packages in Cognos Analytics.

This user guide is intended for those who use Cognos Connection to run existing reports. It will provide an overall introduction to the new Cognos Analytics user interface and how to run a report in both the new Cognos Connection environment and the familiar Zot!Portal website. We will also go over new basic features of Cognos Analytics that demonstrate some of the improved functionality.
Conversion Timeframe to Cognos Analytics – version 10.2 to version 11.0

Timeframe:

February 20th, 2018:
• Kuali Financial System Decision Support Reports on Zot!Portal will begin running on Cognos Analytics (cognos.oit.uci.edu).
  • Conversion should be seamless to the user.
• Consumers can continue running custom reports in Cognos Connection version 10.2.2 (bi.oit.uci.edu) after validating their reports.
• Developers and consumers of ad-hoc reports can begin migrating and running their custom reports in Cognos Analytics (cognos.oit.uci.edu) by validating their reports in the new environment. Training for this will be provided.

April 30th, 2018:
• Cognos 10.2.2 (bi.oit.uci.edu) will no longer be available to UCI Cognos report users for development or ad-hoc reporting
• Conversion of packages and reports to Cognos Analytics for ad-hoc reporting and report development in Cognos Connection must be completed.

What does the conversion to Cognos Analytics mean to you?
• The Cognos Connection URL will be changing to:
  https://cognos.oit.uci.edu/ibmcognos/bi

  If you have any shortcuts or bookmarks to any Cognos reports, you will have to update your links with the new URL. Run the report in Cognos Analytics to get a valid URL to replace your link.
• Clear cache history and enable javascript, if prompted by browser, the first time you log in to Cognos Analytics.
• Ensure your browser is updated (laptops too). Internet Explorer (v11), Firefox Extended Support Release (v52) and Chrome (v45) are compatible browsers for Cognos 11.0.7.
  • Please request a new install of Firefox ESR through OIT HelpDesk if you are currently on Firefox Quantum. Firefox Quantum is NOT compatible with Cognos Analytics.
How to Run Reports on Zot!Portal

The process for running reports on Zot!Portal KFS Decision Support Portlet has not changed. The user experience in Cognos Analytics should be a seamless transition.

Instructions


Signon screen:

Find the KFS Decision Support Portlet under “Decision Support” or “Finances/KFS”:
2. Run reports by expanding a category (clicking on the plus sign) to show hyperlinks to the reports.

3. Click on a hyperlink to bring up the report in a new tab on your browser. You may need to sign on the first time, using your UCINetId and password to login to Cognos. You also may need to clear your cache history the first time you log on.

4. If a prompt page exists, a prompt page will show any fields that the user can enter to run the report. To run the report, click the “Run” button at the bottom of the page.
5. The Report output will be in HTML by default. To export the report to PDF, Excel or Excel to data format, click on the downward pointing triangle to the right of the HTML icon located in the upper right area of the output page. This will expand the format drop down where you can select your output format.

6. Click the Back button to run the report again with a different input field.
Cognos Analytics (version 11.0) Overview

- Single, simplified, unified Welcome portal for all tools
  - Welcome portal uses a sliding panel instead of tabs and folders
    - User experience is the same on all devices
    - More intuitive and interactive

- New Smart Search
  - Fully indexed resulting in quicker results
    - Similar to Google search, returns results as you type
    - No wildcards are needed
  - Searches can be saved for future use
  - Search results can be filtered by content type (reports, dashboards, folders etc.) and by date

- Recently Used Files
- Personalization Opportunities
  - Set home page
- On-Screen Hints/Coach Marks
Accessing Cognos Analytics

The process for running reports in Cognos Analytics (without using the Zot!Portal) begins by logging in to the Welcome Portal. The URL for the Cognos Analytics has changed to the following:

https://cognos.oit.uci.edu/ibmcognos/bi

Signon screen:

Remember, that you may need to clear your cache and cookies history the first time you log in to Cognos Analytics. You also may need to enable javascript in order for the interface to work.

When first logging into Cognos Analytics the user will be directed to the Welcome Portal Home Page. The following pages will guide you through the Navigation Panel and the Toolbar of the Welcome Portal as well as how to run reports in Cognos Analytics.

Cognos Analytics Welcome Portal:
Navigating the Cognos Analytics User Interface (UI)
The goal of the new UI and navigation panel is to provide users with a streamlined way to view content and activities.

Navigation Panel.
On the left side of the UI is the main Navigation Panel. This navigation panel is present on the UI at all times and updates as the user works with the various capabilities within Cognos Analytics.

1. Search. The New Smart Search in Cognos Analytics provides a modernized search engine that uses a smart, intent-driven search function to assist the User. Click on Search to open the search panel. As you type, an auto-fill feature will launch and give search suggestions for related terms. Click outside the Search panel to close it. Searches can be saved or filtered.

2. My content (was My Folders in version 10.2). The My content folder is the personal folder of the user within Cognos Connection. Any object in the My content folder cannot be shared with or viewed by other users.
3. **Team content** *(was Public folders in version 10.2)*. The Team content folder contains all Cognos reports and data downloads the user has permissions to view. **Click on Team content** to open the navigation panel. Notice there is a list of folders. **Click** outside the Team content panel to close it.
More button
As you traverse the folder structure, notice there is a More button to the right of the folder name.

The More button (the ellipsis ) appears when the mouse hovers over the object name. Clicking it displays Properties, and other functions that the user has permissions to view and execute. A Right-click on the object name creates the same drop down menu. The menu will change depending on the object type (folder, report, view, or shortcut, etc.) and with user permissions.

Team content Navigation options
Running Cognos Reports from Cognos Connection

Run Cognos reports in HTML format by first finding your report using the Navigation Panel. For example, if the report you are looking for is in “Team Content”, click on the “Team Content” area and a panel will appear to the right. Traverse down the folder hierarchy by clicking on the folder name to find your report. Slide the vertical gray pane to the right over to display the complete path above. Click on the report name to run the report.

Once the name of the report is clicked, the report will appear in the same tab. If a prompt page exists, then you will see the prompt page. If there is no prompt page, then the report will run and show in HTML format:
Exporting Reports to PDF or Excel

There are two ways to show a Cognos report in other than its default HTML format. One way is to run the report first as HTML format as described in the previous page. Once the report has run in HTML, the “Run As” play button appears on the upper left hand side of the Report Page.

The “Run As” menu allows the user to choose any of the following formats. Once the format is chosen, the reports runs again in the chosen format with the parameters already entered by the user.

For example, if “Run PDF” is chosen the report automatically reruns with the same parameters used to create the HTML. To run the report with different parameters, choose the “Reset prompts and run” option.

A second way to display reports as PDF, Excel, or as Excel data is to use the “Run As” button before running the report from Cognos Connection. To access the “Run As” menu from Cognos Connection, hover the mouse over the report name to expose the More (・・・) button to the right of the file name. Click on the More (・・・) button to expose the options and then select the option to “Run as”.

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For a visual representation of the “Run As” feature, please refer to the provided images.
4. **Recent.** Below the **Team content** button is the **Recent** button. This button shows the user up to 20 of the most recently used objects (reports, dashboards, data modules, etc.) with the most recently used on top. Once an object is viewed, it will move to the top of the list. **Hover** the mouse over the left icon of each object to identify the type of object. **Click** outside the **Recent** panel to close it.

5. **New.** The **New** button allows the user to create a new report, dashboard or data module. Upcoming training sessions for Cognos Developers will address this menu in the future.

6. **Upload files.** The **Upload files** button allows users to upload Excel files for quick analysis and visualizations. Excel XLS, XLSX and CSV files may be uploaded. **Note:** Only the first tab of a multi-tabbed spreadsheet will upload. Save each tab as a separate file if you want to upload multiple tabs of data. Size limit is 100MB.

   OIT will provide training sessions for this feature in the future.

7. **Notifications** – If the user subscribes to a report or report view, the user is notified every time the report is re-run. The subscription option is available when the user runs or views a report, but not if you view saved output.
Toolbar

1. **Welcome** – Navigates the user to the Home Page. The user may set one or more reports, dashboards or queries as home pages.

2. **More** - Sets the user’s home page(s).

   When running a report, the **More** menu gives the user the option to “Share”, “Embed”, or “Subscribe”.

3. **Notifications** -- When running a report, this icon opens a pane showing any notifications from reports or report views the user has subscribed.

4. **User Logon (Personal Menu)** - Sets user preferences and manages subscriptions. This is also where the user can log out of Cognos Analytics.
Other Training/Reference Resources:

1. Click the Help icon. Help takes the user to the IBM Cognos Analytics 11.0 documentation page.

   The Community option takes the user to the IBM Cognos Analytics Community
   http://www.ibm.com/communities/analytics/cognos-analytics/

2. The Cognos Developers Training website (still under construction) in the UCI Wiki includes links to training (mostly for report developers):
   https://wiki.oit.uci.edu/display/public/UCI+Cognos+Developer+Training
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