ENTERPRISE DATA AND ANALYTICS
Illinois State University

IBM Cognos Analytics

Records and Enrollment – Participants Guide

Welcome to ***Cognos Records and Enrollment Training***!

Today's objectives include:

- Gain a Basic Understanding of Cognos
- Understand University policies on data security including FERPA
- Understand the information in the Records and Enrollment package
- View reports using the Records and Enrollment package
- Understand which package/report to use for your reporting needs
- Request access and additional assistance

Supported Web Browsers
Cognos Analytics works best with Google Chrome, other browsers may not function properly.

Table of Contents:

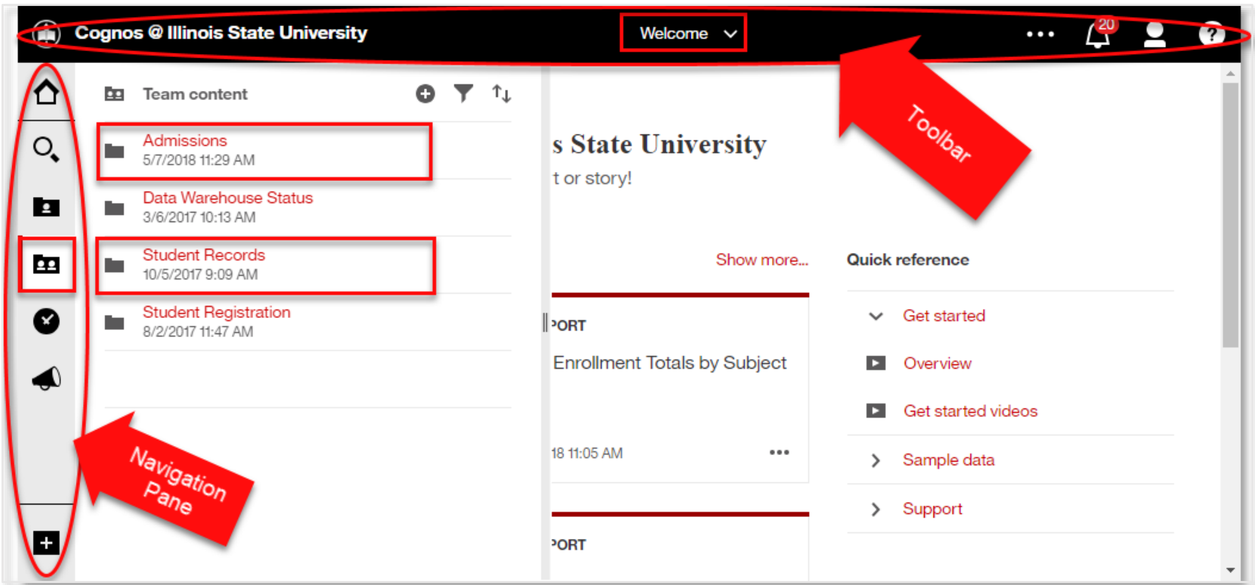
A. Cognos Overview - Guided Instruction

Navigate to Cognos

For this training session, we will provide the Cognos Test Environment and you will be given a training log in and password.

Welcome Page Overview

After logging in, users will land on the Welcome Page.



Welcome Page Toolbar

- **Welcome** – Toggle between the Welcome screen (Home icon) and reports/pages that you have accessed since logging in.
- ***More*** – More dots icon will contain different options for each page.
- ***Notifications*** – Saves your last 20 delivered report subscriptions.
- ***Personal Menu*** – Individual user preferences such as editing subscriptions, editing home page, and signing out.

Navigation Pane

- ***Home*** – Returns you to the Home/Welcome Screen
- ***Search*** – Search through all reports you have access to. Either search for the title of a report or search for a data item that appears in the reports.
- ***My Content*** – Reports that you edited and/or created are saved here. When saving, be sure to select ***My Content***.
- ***Team Content*** – All managed Reports and Packages are housed in this folder. You will not be able to save to this folder.
  - ***Admissions folder*** – Where to go to access Admissions Reports and Packages.
  - ***Student Records folder*** – Where to go to access Records and Enrollment Reports.
- ***Recent*** – Houses the last 20 reports you have opened.
- ***News and Alerts*** – EDA's website home page. Check here for known issues that arise, new reports, and training resources.
- ***New*** – Create a new report from a package you have ad hoc access to.

B. View a Report – Guided Instruction

Navigate to Reports

The trainer will demonstrate navigating to the Plan Roster Report. The information covered about the report viewer can be applied to any interactive report in Cognos.

For a list of all the reports and a description, visit AT.ilstu.edu/enterprise-data-analytics/bi-reports/.

Plan Roster Report

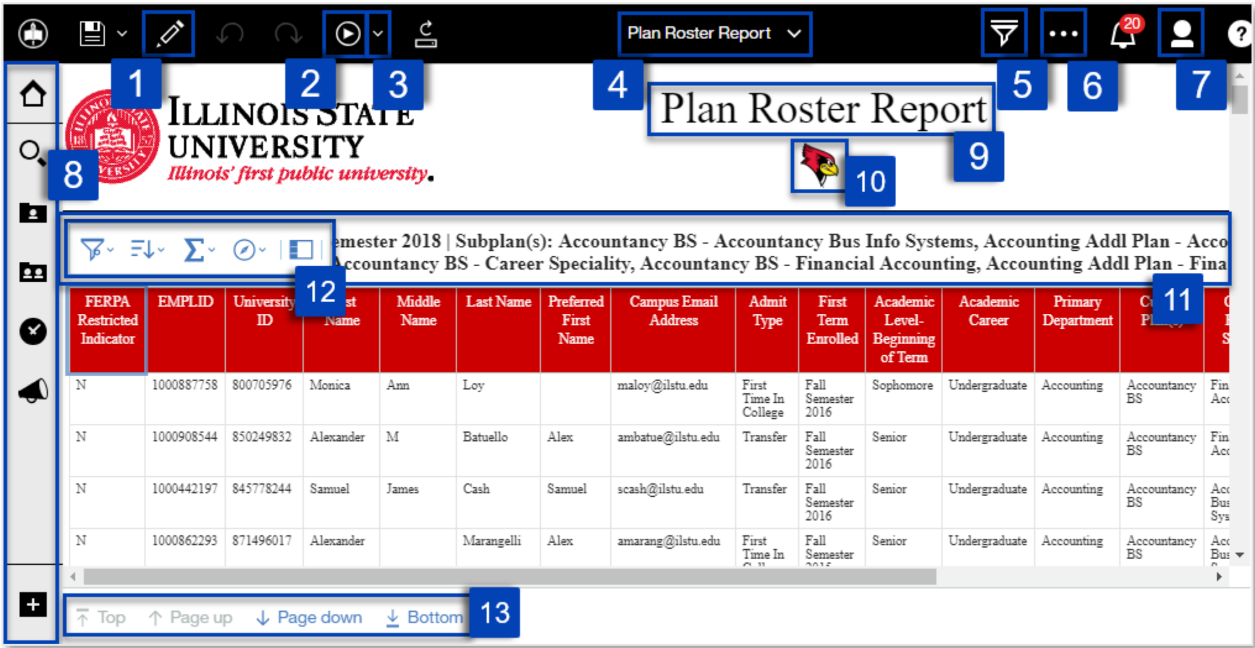
We will be viewing the Plan Roster Report which provides academic information for enrolled students by college, department, plan or plan/subplan.

1. **Report Navigation:** ***Team Content*** > ***Student Records*** > ***Reports*** > ***Plan Roster Report***.
2. Suggested Prompts:
   a. ***Step #1 Term*** – ***Spring Semester 2019***
   b. ***Step #2 Career*** - ***Undergraduate***
   c. ***Step #3 Type Criteria*** – ***Plan & Subplan***.
   d. Click the ***Next*** button.
   e. ***Step #1 Plans*** – ***Accountancy BS*** and ***Accounting Addl Plan***.
   f. Click the ***Reprompt*** button.
   g. ***Step #2 SubPlan*** – ***Select All*** link at the bottom of the box.

Prompt Screen *When running a report, the prompt screen will first appear. Prompt selections are made before a report can run. The prompt selections act as filters, so only the information you wish to view is displayed. Every report's prompt screen is different depending on the purpose of the report.*

3. Once you have selected your prompts, click the ***Finish*** button at the bottom of the screen.

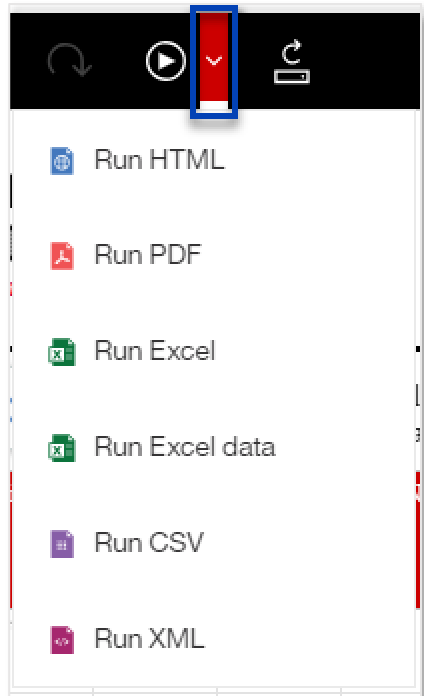
Overview of Report Viewer (Interactive Reports)



1. ***Edit in authoring*** – When a user has ad hoc access, they use this icon to access the report editor.
2. ***Run*** *(Reset Prompts and Run)* – Use the actual *Run* icon to go back to the prompt screen and change the prompt selections.
3. ***Run*** *(dropdown arrow)* – The *Run* dropdown arrow icon is used to export the report.
4. ***Page Title dropdown*** – The title of the current page is display. Use the dropdown to navigate through reports that have been viewed during a logged in session.
5. ***Show Filters*** – Displays filters you have added to the report.
6. ***More*** – Gives options such as setting a report as the home page and subscribing to a report.
7. ***Personal Menu*** – Gives options for customization such as editing subscriptions.
8. ***Navigation Pane*** – Just as on the Welcome Screen, use this pane to navigate to other reports.
9. ***Report Title*** – The title of the report will display at the top of the report.
10. ***Data Cookbook*** – Click Reggie's head to view all data items in the report along with their description.
11. ***Prompt Selections*** –Some of your prompt selections will display at the top of the report.
12. ***Interactive Options*** – Create your own filters, sorting, and groups.
13. ***Page Navigation*** – Navigate through the pages of the report.

Run/Export Options

The Run dropdown arrow gives a user several options for exporting the report.



Most information in Cognos is updated overnight. Every time a report is ran, the report displays the most recent information. If you wish to view the same information at a later date, export and save the report to a local drive.

Run *(Reset Prompts and Run)* – the actual Run icon will return the user to the prompt screen to change prompt selections.

Run HTML – Reports in Cognos run in HTML by default.

Run PDF – A static view of the report. Many of ISU's reports do not display well in PDF format.

Run Excel – All of the report information is exported to an Excel spreadsheet, and most formatting is the same.

Run Excel data – All of the report information is exported to an Excel spreadsheet, but all formatting is stripped.

Example: Students' addresses are displayed as one data item in some reports. This option will display the students' address in several columns so mail merges can be used.

Run CSV –Some users may find it useful to run a report as a common separated value (CSV) file. This is most commonly selected when using a different program than Excel.

Export an Interactive Report to Excel in Google Chrome

Steps:

1. Click the ***Run*** dropdown arrow in the upper left corner.
2. Click ***Run Excel***.

   *A message will appear just below the tool bar stating **Downloading as Excel**. Your prompt selections will be displayed.*
3. Confirm or change the prompt selections, then scroll down to the bottom of the page and click ***Next*** button.
4. Confirm or change the prompt selections on the second prompt screen, then scroll down to the bottom of the page and click the ***Finish*** button.
5. A box with a ***Cancel*** button will appear. It may take several seconds for your report to display.
6. The document will appear in the bottom, left corner of the window.
7. Double click on the report's name.

The report will open in Excel.

8. After you are done viewing the Excel file, close Excel and return to Cognos in your web browser.

Change Selected Prompts

Prompt selections can be changed at any point while viewing a report.

Steps:

1. Click the ***Run*** icon in the upper left corner.
2. Use the Prompt Screen to reset your choice of prompts.

Subscribe to a Report

Users subscribe to reports they frequently view. Updated reports are sent as emails and saved in Cognos based on the schedule the user sets up.

Steps:

1. From the viewer, click the ***More*** dots icon in the upper right corner.
2. Click ***Subscribe***.
3. Use the ***On day(s)*** field to select the days of the week the report will be run and sent.
4. Use the ***Time*** field to enter the time the report will be run and sent.
5. Click the ***arrow*** at the end of the ***Format*** field
   a. Confirm ***HTML*** is selected
   b. Select ***Excel*** or ***Excel Data***.
   c. Click the ***Done*** button.
6. Click the ***arrow*** at the end of the ***Delivery*** field.
   a. Select ***Send report by email***.
   b. When two options appear, select ***Attach the report*** or ***Include a link to the report***.
   c. Confirm ***Save report*** is selected.
   d. Click the ***Done*** button.
7. Click the ***Create*** button.

> *Depending on the day(s) of the week you wish to receive the subscription, you may need to unselect the current day of the week.*

> *Most information is updated overnight. For the most up to date report, enter a time after 4:00AM.*

Once a subscription has been sent it will also be saved under the ***Notifications*** icon on the right side of the tool bar.

Manage Subscriptions

Once a user has subscribed to a report, the subscriptions can be edited or deleted.

Steps:

1. Click the ***Personal Menu*** tab.
2. Click ***My schedules and subscriptions***.

> *Subscriptions are displayed in the order they were last modified (created or edited.) The subscription you just created will be at the bottom of the list.*

3. Hover over the subscription you wish to edit. Click the ***More*** dots that will appear to the right of the subscription.
4. Click ***Modify this subscription*** to edit.
5. To edit the ***Prompts*** field:
   a. Click the ***arrow*** at the end of the ***Prompts*** field.
   b. Click ***Edit*** in the top right.
   It may appear that nothing is happening for a few seconds.
      i. Select your choice of prompts from the selections.
   c. Click the ***Finish*** button.
   d. When a second prompt screen appears, click the ***OK*** button at the bottom of the window.
   e. Click the ***Back*** arrow top left of the pane.
   f. Click the ***Update*** button.

> *All selections can be edited the same way they were originally selected except for the Prompts field.*
> *Although prompts could not be changed when the subscription was created, they can now be edited while modifying the subscription.*

Once the Update button has been clicked, the subscriptions has been edited. Confirm the ***Modified*** date and time have updated.

Return to the Plan Roster Report

By going to the ***My schedule and subscriptions*** page, we left the report viewer page. Use the dropdown in the top middle of the toolbar to return to reports you have viewed during that log in session.

Steps:

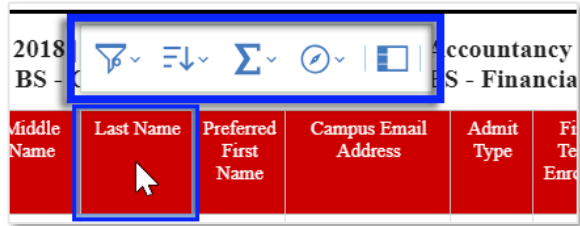
1. Click the dropdown arrow by the name of the page ***My schedules and subscriptions*** in the middle of the top toolbar.
2. After the dropdown list appears, click ***Plan Roster Report***.

The report will load with the prompt selections you previously made.

Using the Interacitve Toolbar in Interactive Reports

Interactive reports allow users to create their own edits to managed reports.

In this example we will filter out any students that aren't at least sophomore level. We will also use filters to view only one Primary Department in the report. The report will be grouped based on students' academic level and then sorted within the group based on completed ISU credit hours and then by alphabetical order. Finally, we will add a summary to see the average cumulative GPA within each academic level and for the group as a whole.



Filter

Information in the report will be narrowed down the same way every time the report is ran.

Categorical Data Item

1. Click the column header of the data item for which you wish to create a filter. (***Primary Department***)
2. Click the ***Filter*** icon.
3. Click ***Create Custom Filter***.
   Depending on the type of value that is in the column you selected (numerical or categorical) will determine what which tabs you see when the window opens.
4. Under the ***Specific Values*** tab, locate and then hover over the value(s) you would like to include in the report. Then click the next to the value. It will then appear in the box to the right.
5. Click the ***OK*** button.

Numerical Data Item

1. Click the column header of the data item for which you wish to create a filter. (***Total Hours***)
2. Click the ***Filter*** icon.
3. Click ***Create Custom Filter***.
   Depending on the type of value that is in the column you selected (numerical or categorical) will determine what which tabs you see when the window opens.
4. Under the ***Comparison*** tab, use the ***Operator*** dropdown menu to select ≥.
5. Type in the ***Value*** field "**30**."
6. Click the ***OK*** button.

View the current Sorting and Grouping on the Report

1. Click any column header.
2. Click the ***Sort*** icon.
3. Click the ***Edit Layout Sorting*** option.

The left box will display all data items that appear in the report. They are displayed in the order they were added to the report, not the order they appear. The right box will show any grouping and sorting that has already been applied to the report and the level of hierarchy.

Group

Groupings put all identical values in a column together.

1. Click the column header of the data item you wish to group by. (***Academic Level-Beginning of Term***)
2. Click the ***Group*** icon.

The data items the report is being grouped on will appear at the front of the report. Each value will only appear once.
Reports can be grouped by more than one data item at the same time.

Sort

Sorting organizes information in ascending or descending order.

Sort using the Interactive Toolbar

1. Click the column header of the data item you wish to sort by. (***ISU Earned Hours***)
2. Click the ***Sort*** icon.
3. Click the ***Ascending*** option.

Sort using the Layout Sorting Menu

1. Click any column header.
2. Click the ***Sort*** icon.
3. Click the ***Edit Layout Sorting*** option.

Notice the updated grouping and sorting appear in the right box.

4. Locate in the left ***Data Items*** box, the data item ***Last Name***. Drag and drop it in the right ***Groups*** box under the ***Cumulative Combined Total Earned Units*** data item.
5. Repeat step 4 for the data item ***First Name*** and then ***Middle Name***.
6. Click the ***OK*** button.

Summarize

Summarizing adds totals, averages, counts and other helpful information as it applies to grouped data items and the report as a whole.

1. Click the column header of the data item you wish to summarize. (***Cum GPA***)
2. Click the ***Summarize*** icon.
   Depending on if the data item is a categorical or numerical value will affect which options are active in the menu.
3. Click the ***Average*** option.
4. Follow steps 1-2 again.
5. Click the ***Count*** option.

Helpful tips with Interactive Reports:

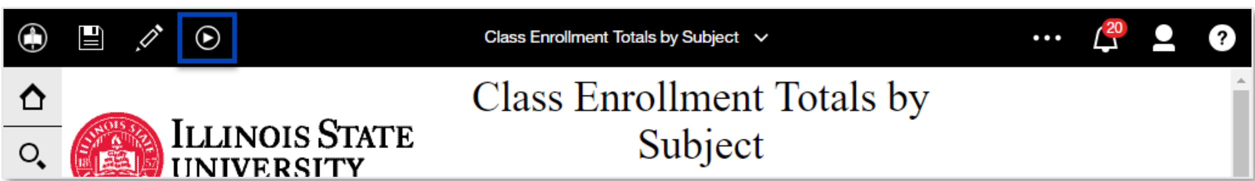
- Use the Undo and Redo buttons in the top left corner of the top toolbar to modify your edits.
- Use the Edit Layout Sorting menu under the Sort icon to view and change the way the report is being grouped and sorted.
- Use the Filter icon in the top right corner of the upper top toolbar to see the filters you have added to the report.
- Save your report to the My Content folder in order to view the same edits at a later time.

Navigate to Another Report

Navigate to the Class Enrollment Totals by Subject report in the Records and Enrollment package. The report displays class enrollment and capacity totals for all class by subject.

1. Click the ***Team Content*** icon.
   Cognos will remember the folder path previously followed. The following folder selection should be represented in the breadcrumbs at the top of the navigation pane.
   Student Records > ***Reports***
2. Click the ***Class Enrollment Totals by Subject***.
3. Suggested prompts for the Prompt Screen:
   a. ***Step #1 Term:*** ***Spring Semester 2019***
   b. ***Step #2 Class Subject***: ***Biological Sciences*** and hold down the **Ctrl** key and select ***Chemistry***
   c. ***Step #3 Class Components:*** ***Select all***.
4. Click the ***Finish*** button.

Report Viewer Difference (Standard Report)



1. ***Run as*** – All export options as well as the ***Reset prompts and run*** options are available.
2. The icons ***undo***, ***redo***, ***run*** dropdown arrow, and ***refresh*** are absent.

Export a Standard Report to Excel

These are the steps for exporting a fixed report. If you are unsure which report type you are viewing check the icons in the top left. When the ***undo***, ***redo***, ***run*** dropdown arrow, and ***refresh*** icons are present you are viewing an interactive report. When those icons do not display, you are viewing a fixed report.

Steps:

1. Click the ***Run*** icon button in the upper left corner.
2. Click ***Run Excel***.

It may take Cognos a minute to process your request.

After the request has been processed, the options will vary depending on your browser.

*****A pop window will appear with a text box saying, "***Your report is running." When the text box disappears and the text appears at the top of the window saying***, "***Your report is ready and will download to your Web browser in a few minutes***," the Excel file is in the bottom left corner.

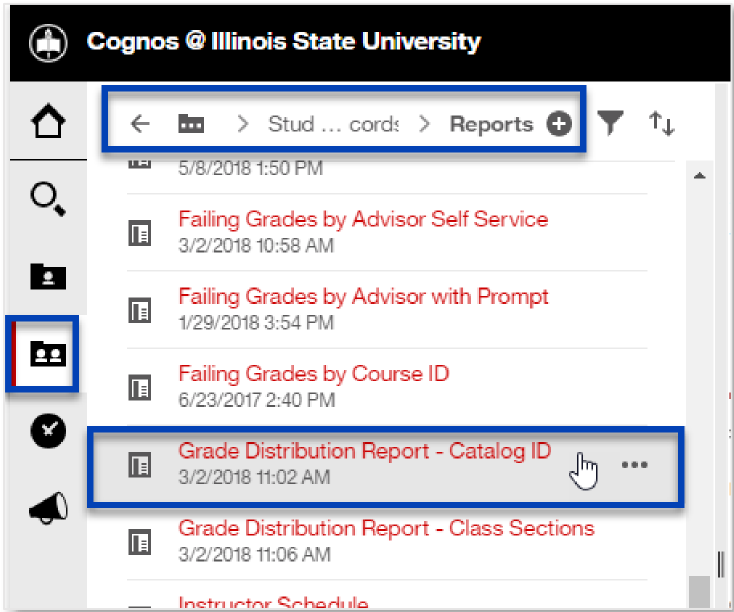
3. After you are done viewing the Excel file, close Excel and return to Cognos in your web browser.

C. View a Report – Independent Practice

The following instructions will walk you through the **View a Report** independent activity. Follow the detailed steps or if you would like to test yourself, try to complete the task in the first line before reading the step by step instructions.

1a. Navigate to a Report

Open the ***Grade Distribution Report – Catalog ID*** report in the ***Records and Enrollment*** package.



Steps:

1. **Report Navigation:** ***Team Content*** > ***Student Records*** > ***Reports*** > ***Grade Distribution Report – Catalog ID***
2. Suggested prompts:
   a. ***Step #1:*** ***Spring Semester 2019***
   b. ***Step #2***
      i. ***Keywords***: "`Agr`"
      ii. Click the ***Search*** button.
      iii. Select ***AGR 201 – Resources, Food & Society***.
      iv. Click the ***Insert*** button.
3. Once you have selected your prompts, click the ***Finish*** button at the bottom of the screen.

1b. Navigate to the Drill-Through Report

View the class sections that make up the Catalog ID report by clicking on the link and drilling through to the ***Grade Distribution - Class Sections*** report.

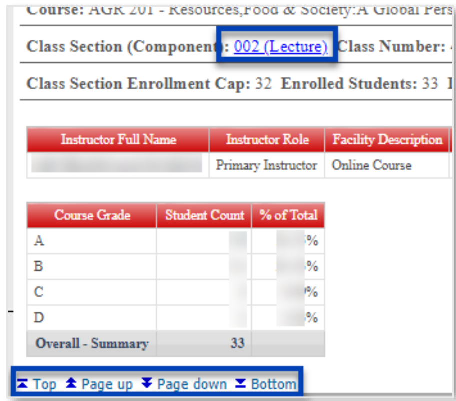
Steps:

1. Click on the ***Course Catalog ID- Course Name (Class Component)*** field to drill through to the ***Grade Distribution Report – Class Sections*** for a report on the grade distribution for every class section of the course for the selected term.

   The data for the drill-through report will reflect the prompt selections when ***Grade Distribution Report – Catalog ID*** report was ran.

1c. Use Page Navigation

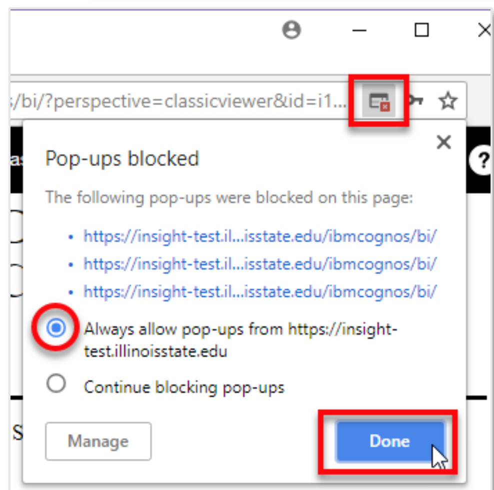
View the class roster for one of the sections of the class you are viewing by using the drill-through link in the ***Grade Distribution - Class Sections*** report.



Steps:

1. Click the ***Page down*** and ***Bottom*** links in the bottom left corner of the report to navigate to additional class sections. Every class section has its own page. Do this until you land on the class section you would like to view the class roster for.

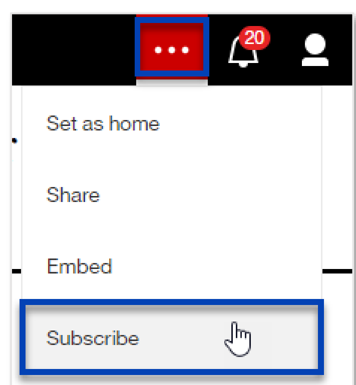
2. Click on the ***Class Section (Component)*** field ***002 (Lecture)*** to drill-through into the ***Class Roster Report***.



> ***If the class roster report does not display in an additional tab, you should **turn off your pop-up blocker** or allow pop ups.
>
> After you have changed this setting, you will need to click on the class section again.

*The data for the drill-through report will reflect the prompt selections when **Grade Distribution Report – Catalog ID*** report was ran.

1d. Subscribe to a Report

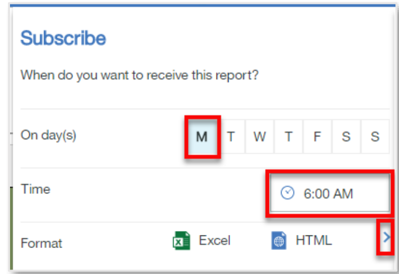


Subscribe to this report so that it is emailed to you every Monday at 6:00AM as an HTML and Excel document.

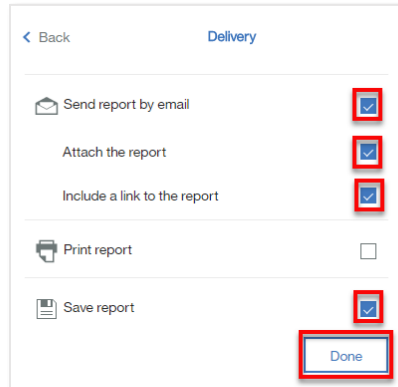
Steps:

1. Click the ***More*** dots ••• icon in the upper right corner.
2. Click ***Subscribe***.

3. Use the ***On day(s)*** field to click ***Monday (M)***.
   Make sure all other days are unselected.
4. Use the ***Time*** field to enter "`6:00AM`."
5. Click the ***Format*** field arrow.
   a. Confirm ***HTML*** is selected and select ***Excel***.
   b. Click the ***Done*** button.



6. Click the ***Delivery*** field arrow.
   a. Select ***Send report by email***.
   b. When two options appear, select ***Attach the report*** and confirm ***Include a link to the report*** is selected.
   c. Confirm ***Save Report*** is selected.
   d. Click the ***Done*** button.
7. Click the ***Create*** button.

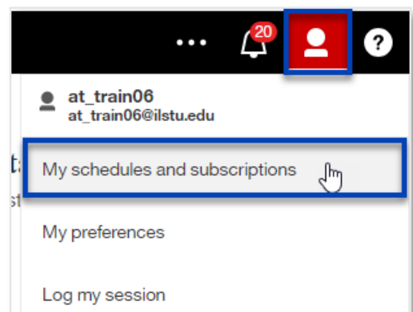


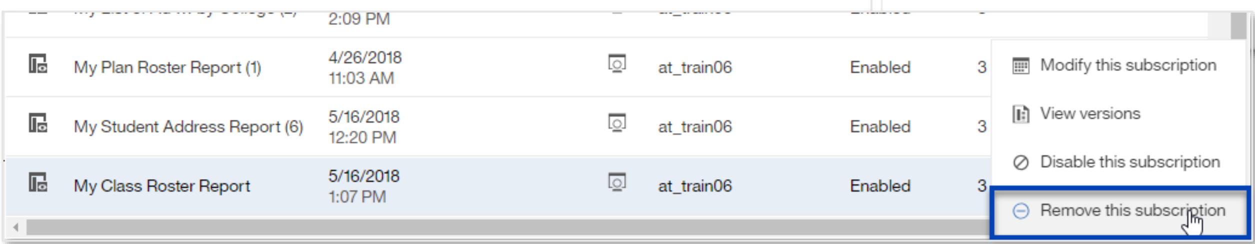
1e. Manage/Delete Subscriptions

Delete the subscription you created above.

Steps:

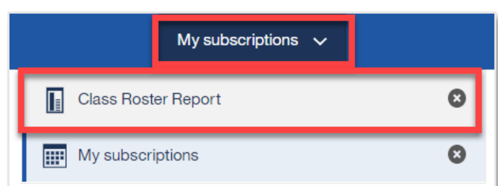
1. Click the ***Personal Menu*** tab.
2. Click ***My schedules and subscriptions***.
3. Hover over the subscription you wish to remove. Click the ***More*** ••• dots that will appear to the right of the subscription.
4. Click ***Remove this subscription***.





Return to viewing the report by:

1. Clicking ***My subscriptions*** in the middle of the top toolbar.
2. Click the report ***Class Roster Report***.

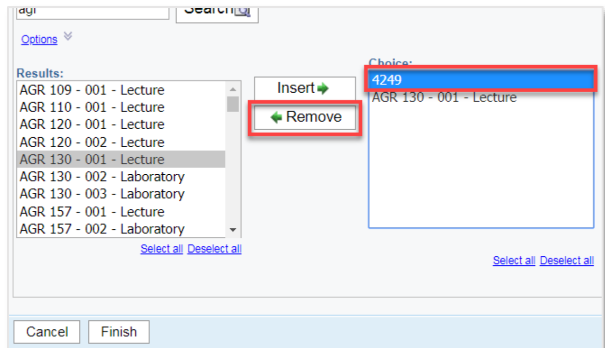


1f. Change Selected Prompts

View the ***Class Roster Report*** for Section 1 of Agriculture 130 in Spring 2017.

Steps:

1. Click the ***Run*** icon in the upper left corner.
2. Click ***Reset Prompts and run***.
3. Select the following from the report prompts:
   a. ***Step #1:*** ***Spring Semester 2019***
   b. ***Step #2:***
      i. ***Keywords***: "`agr`"
      ii. Click the ***Search*** button.
      iii. Select ***AGR 130 – 001 – Lecture***.
      iv. Click the ***Insert*** button.
      v. In the ***Choice*** box, select ***4249*** which represents the class section you were just viewing.
      vi. Click the ***Remove*** button.



4. Once you have selected your prompts, click the ***Finish*** button at the bottom of the screen

Frequently Viewed Reports

Below is a list of some of the more commonly used reports along with a suggested prompt screen selection. Feel free to view these or other reports during the break.

Folder Navigation for all reports in the Records and Enrollment Package:
Team Content > ***Student Records*** > ***Reports*** > *The report of your choice*

Plan Roster Report

Displays academic information for enrolled students by college, department, plan or plan/subplan.

1. **Report Navigation:** ***Plan Roster Report***
2. Suggested Prompts:
   a. ***Term:*** ***Spring Semester 2019***
   b. ***Criteria:*** ***Plan***
   c. Click the ***Next*** button.
3. Select the following from the report prompts:
   a. ***Plans:*** ***Accountancy BS***
   b. Hold down the **Ctrl** key and select ***Accounting Addl Plan***
4. Click the ***Finish*** button.

Advisor Case Load

Displays academic and contact information about students on a given advisor's case load. Any advisor's case load can be viewed. This report is very similar to the Advisor Case Load Self Service report, which is used by advisors to view their own case load.

1. **Report Navigation:** ***Advisor Case Load***
2. Suggested Prompts:
   a. ***Step #1 Term:*** ***Spring Semester 2019***
   b. ***Step #2 Enrollment Status:*** ***Enrolled***
   c. ***Step #3 Advisor Name:*** `Aitken`
   Click the ***Search*** button.
   Select ***1000476705-Brian Aitken***
   Click the ***Insert*** button.
3. Click the ***Finish*** button.

Instructor Schedule

Displays course information of a class by individual instructor or by all instructors within a subject, college, or department.

1. **Report Navigation:** ***Plan Roster Report***
2. Suggested Prompts:
   a. ***Term:*** ***Spring Semester 2019***
   b. ***Criteria:*** ***Subject***
   c. Click the ***Next*** button.
3. Select the following from the report prompts:
   a. ***Subjects*** ***Agriculture***
4. Click the ***Finish*** button.

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Student Registration Package

The Student Registration Package contains several reports dealing with details about registration information. Each of the reports in the package can be accessed by directly clicking on them, or by using the drill-throughs in the Department Registration Dashboard.

Department Registration Dashboard

The Department Registration Dashboard is an interactive, real time dashboard that displays student registration counts by career, department, plan, and sub-plan. Users can use the dashboard to drill-through into detailed reports about the students that make up each number.

Open the Registration Dashboard

The Registration Dashboard was created so you can monitor what students have registered for classes and what students still need to register. It is reponsive to selections you make so you can see different populations and the students that make them up.

Steps:

1. Click the ***Team Content*** icon.
2. Click the ***Student Registration*** folder.
3. Click the ***Reports*** folder.
4. Click the ***Department Dashboard*** folder
5. Click the ***Department Registration Dashboard*** .

Note: The dashboard has a different icon than the reports that make up the drill-throughs.

The dashboard opens in an additional tab. If an error message appears, make sure your pop up blocker is set to allow pop ups for Cognos.

The dashboard takes a while to load. This is normal.

If it does not seem to load correctly, or shows an error message on the new tab, click the refresh button on your browser.

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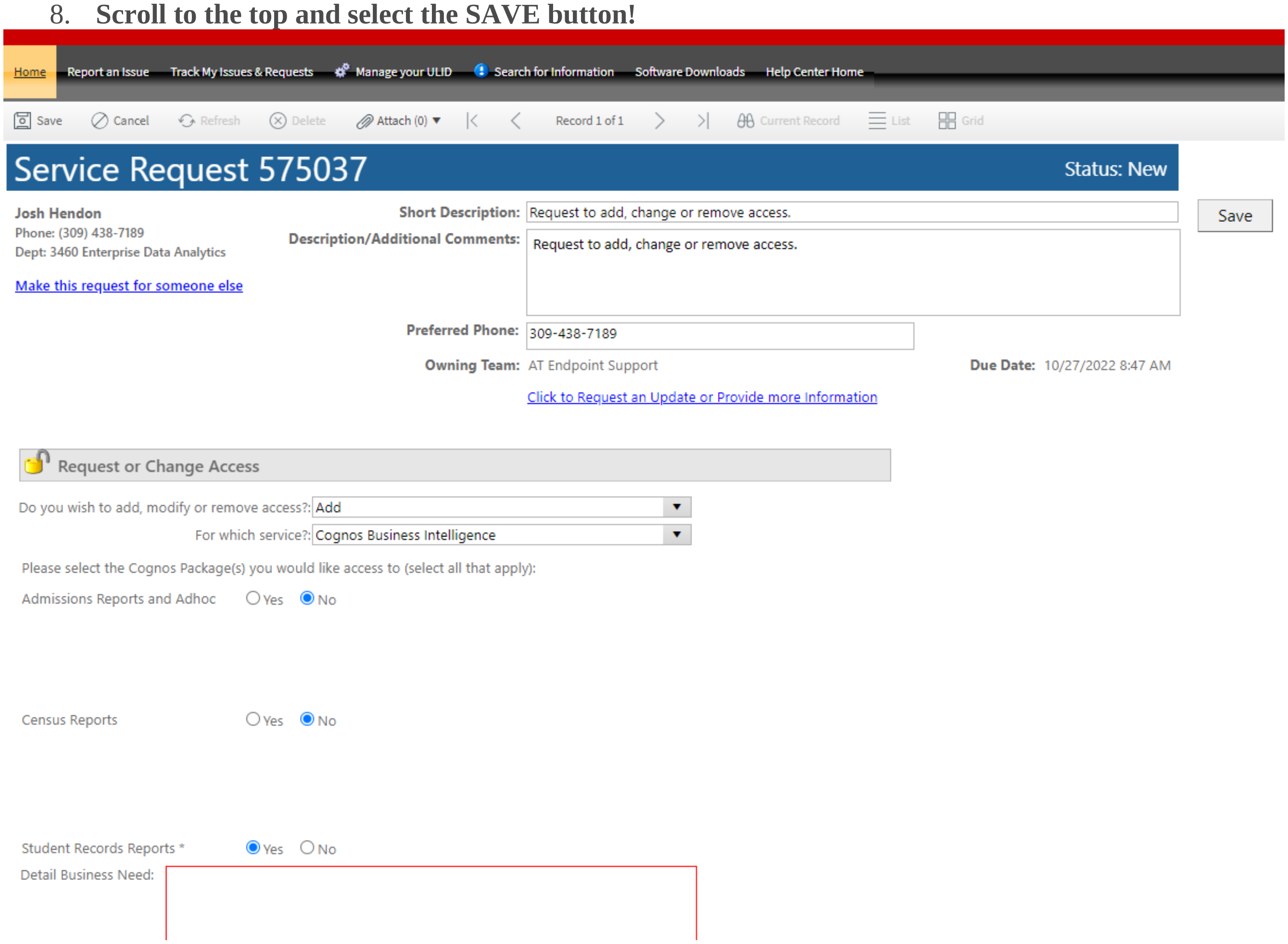
Request Access to Cognos

Attending this class does not grant you access to Cognos. You must request access to each package and include a business case.

Steps:

1. In a web browser, enter https://help.illinoisstate.edu/.
2. Click the Get IT Help tab.
3. Scroll halfway down the page on the right-side under Requests, select Submit Detailed Request.
4. Log into Cherwell with your ISU login and password.
5. Under the Popular Request tab, select Request or Change Access. (If you do not see this tab, please email eda@ilstu.edu directly with the packages needed and a corresponding business need.)
6. Leave the Short and Long description fields alone and fill out the red boxes.
    a. Enter your preferred phone number
    b. Select whether you are adding or modifying access.
    c. For Service, select Cognos Business Intelligence from the dropdown menu (don't try to type it). It will pop up with available packages.
7. For every package you want, click the Yes button and add a business need. For Other, specify the package name.
8. **Scroll to the top and select the SAVE button!**



Where to Get Help

Contact Enterprise Data and Analytics (EDA)

- Email: eda@ilstu.edu
- Website: https://data.illinoisstate.edu/reports-dashboards/cognos/
    - Includes the following:
        - Information about packages/reports
        - Changes and upcoming releases
        - Additional training resources including videos

Contact the Technology Support Center (TSC) for additional help

- Phone: 438-HELP (4357)
- Email: supportcenter@ilstu.edu

You Try!

Once you have access, navigate to Cognos using this link https://insight.illinoisstate.edu/ and log in using your ULID and password.

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