



Report Page Overview

The Report page below displays features for interactive reports. If a report is not interactive, the user will not see the Undo and Redo icons. Those features and others like sorting and filtering are not available for standard reports. Most of ISU's reports are interactive.









The screenshot shows the Cognos report interface for 'Advisor Caseload'. It includes a top navigation bar with 'Cognos - Illinois State University' and 'Advisor Caseload'. A search bar is present on the right. Below the navigation is a toolbar with icons for Edit, Save, Undo, Redo, and Filters. The report title 'ILLINOIS STATE UNIVERSITY' and 'Advisor Caseload' is displayed. The main content is a table with columns: Advisor Emplid, Advisor Last Name, Advisor First Name, Advisor Preferred Email, Advisor Role Code, Advisor Role, Advisor Address, Academic Term, FERPA Restricted Indicator, Student Emplid, Student UID, Last Name, First Name, Email Address, Primary Phone Number, International Indicator, Academic Career, Enrolled Indicator, and Acad Lev Begin of T. The table contains four rows of data. At the bottom, there are navigation controls for 'Top', 'Page up', 'Page down', and 'Bottom'.

#	Icon	Description
1		More: Click on this and the Subscribe option will display. Click on Subscribe to schedule the report to run weekly using the prompts in the report. See the Create a Subscription procedure for more details. Note this More icon has different options then the More icon at the top of the report and below the black application bar.
2		Edit Toggle Switch: Swipe right to turn on edit mode and swipe left to turn off edit mode. The icon on the left is shown in off mode. If swiped to the right, the icon would turn green and a few more options would display on the edit toolbar to the right.
2		Save and Save as: Click on the disk icon to save the report. Click the arrow down to save copy of the report with a new name and location. Only some users have access to save a report in Cognos.
2		Share: Not recommended to share or embed report output.



2		Undo or Redo: Click the arrow pointing left to reverse (undo) the last action. Click the arrow pointing right to do the last action that was just reversed (redo).
2		Run or Run as: Click the triangle to run the report in HTML (web page) format and if the report has prompts, they will be displayed for the user to select. Click the down arrow next to the triangle to run the current report with the same prompts as the report displayed. Select a format to display the report (Excel, Excel Data, etc.) from the dropdown.
2		Refresh: Click refresh to redisplay the page. The user may want to do this if it has been a while since they have performed any action in Cognos so they can log back in again.
3		More: Click on the More icon to display a dropdown that changes based on other actions executed on the page. Normally not used much. Note this has different options than the More button on the black application bar.
3		Filters: Click on it to open a right sidebar that allows the user to see any filters that were interactively added after the report was generated. A filter can be removed by clicking on the Delete icon. The report may not update right away. If the screen goes blank, the user will have to click the Run icon and re-select any prompts to see the updated report with the filter(s) removed. Click on the filter icon to close the sidebar. The user cannot add a filter using this icon. Use the filter icon on the interactive toolbar, next to the Sort icon, to add a filter. See the Modify an Interactive Report procedure for more details.
4		Dock or Undock Interactive Toolbar: The toolbar is normally docked in the upper left-hand corner above the report under the Edit icon. If it is not there, it can be on or above a column header. Sometimes it is not on the screen at all. If the toolbar cannot be found, click on a field in the report and it will display above the field.
4		Filter (next to the Sort icon): Allows the user to add one or more filters to the report. Click on the column to filter on, then click the filter icon. To include or exclude a specific value for the filter, click on that value in the report and then the filter icon and it will provide that option in the dropdown. It allows the user to create custom, more complicated filters or remove all filters. The report may not update right away. If the screen goes blank, click the Run icon and re-select any prompts to see the updated report with the filter(s). Unless the report runs quickly and the desired filter is basic, it is recommended to export the report to Excel and use the filter in that tool. See the Modify an Interactive Report procedure for more details.
4		Sort: Click on a column to be sorted and click the Sort icon. It will display a dropdown to select ascending, descending, or stop sorting. The report may not update right away. If the screen goes blank, click the Run icon and re-select any prompts to see the updated report with the sorting. For more complicated sorting, such as multiple columns, select the Edit layout sorting option.



		Unless the report runs quickly and the desired sorting is basic, it is recommended to export the report to Excel and use the sort function in that tool. See the Modify an Interactive Report procedure for more details.
4		Summarize: Click on a field to summarize and then click the Summarize icon. A dropdown will display allowing the user to pick Total, Count, etc. The report may not update right away. If the screen goes blank, click the  Run icon and re-select any prompts to see the updated report with the summary row(s). Scroll and/or page down to the end of the report and the last row will show the summarized value in that column. The user will have to close the report and re-run it to clear the summarized rows. See the Modify an Interactive Report procedure for more details.
4		Lineage Information: Click on a field value and then the Lineage icon to find the database source for the field. A popup box will display the field name, its namespace, and its data source. The Technical View (tab at the top) will show the field's table name and how it is related to other tables.
4		Add Calculated Members: Click on this icon to show a dropdown with options such as suppressing rows that have missing values, zero values, etc. Click on this again to remove the suppression. See the Modify an Interactive Report procedure for more details.
4		Group Data: Click on a field to be grouped and then click on the group icon. The report may not update right away. If the screen goes blank, click the  Run icon and re-select any prompts to see the updated report with the grouping. Click on the group icon again to remove it. When data is grouped, repeat values in the same column next to each other are merged so the data is displayed only once across multiple rows. See the Modify an Interactive Report procedure for more details.
5	Advisor Caseload (Example)	Title: The report title.
5		Reggie's Redbird: Click on Reggie's Redbird icon to view a description of all the fields on the report and their filters.
6	Illinois State University Summer Download Option: Use "Run Excel Data"	Prompt Selections: The selections the user made to run the report. If there are any special instructions, such as download options, they are also listed here.
7		Page Navigation: The bottom left of a report, may have page navigation. Click on Top, Page up, Page down or Bottom to move through the pages in the report. Not all reports have page navigation. If no page navigation exists, just scroll through the report.