



MOTT COMMUNITY COLLEGE

JOB AID



Introduction to COGNOS 8

Login

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Name _____

Training Date _____

Procedure Information:

Title: Introduction to Using COGNOS 8
 Mnemonic:
 File Name: JA_Into to Using Cognos 8.ppt
 Application:
 Primary Dept: All Users
 Effective Date: June 14, 2007
 Revision Date: June 1, 2009 Rev # 3

Purpose:

Use this guide to develop an understanding of the initial Login Process for COGNOS 8. The guide demonstrates how to login to the system for the first time, change your default password to a password of your choosing, set the report tabs and change preferences.

Summary Steps

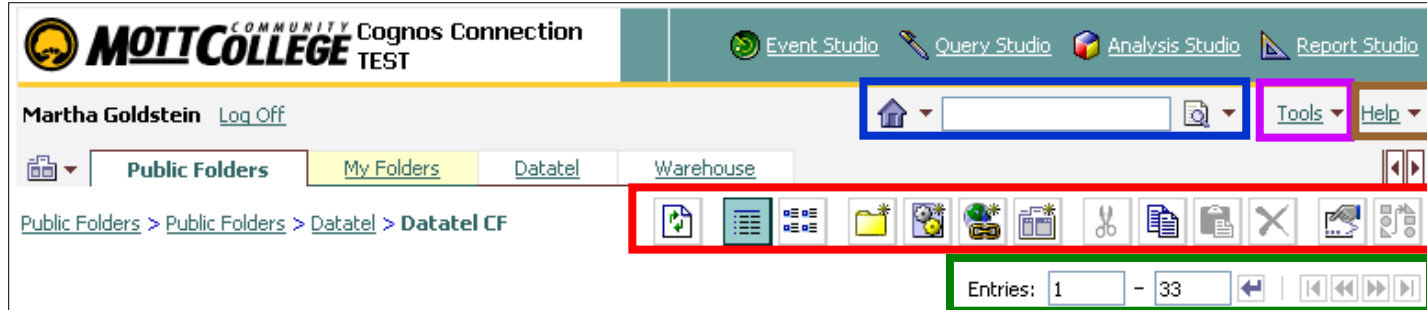
1. Login to Cognos 8, type your User ID (First letter of First Name and entire Last Name, no spaces, e.g.. **jdoe**) and type the Password **mottcc**, the first time. You will then be prompted to select your own password. Memorize your password – if you forget, it will be reset to the default and you will have to complete this step again.
2. Enter Cognos Connection.
3. Initial User Setup
4. Using Public Folder to Add Portal Tabs
5. Adding Portal Tabs
6. Set View As Home
7. Setting Your Preferences
8. Understanding Prompts

Resources:

[Ives, Gail B.](#) (810) 762-0230
 Fax: (810) 762-0257 Institutional Research
 Executive Director
 Curtice-Mott Complex CM1000

ITS Help Desk

x24357 (inside College)
(810) 762.0216 (outside College)



Search Bar

Home [Search](#) [Advanced](#)

Tools

[Tools](#)

- [Drill-through Definitions](#)
- [Schedule Management](#)
- [My Preferences](#)

Help

[Help](#)

- [Quick Tour](#)
- [Getting Started](#)
- [Cognos on the Web](#)
- [Go to the Welcome Page](#)
- [About Cognos Connection](#)

Task Bar

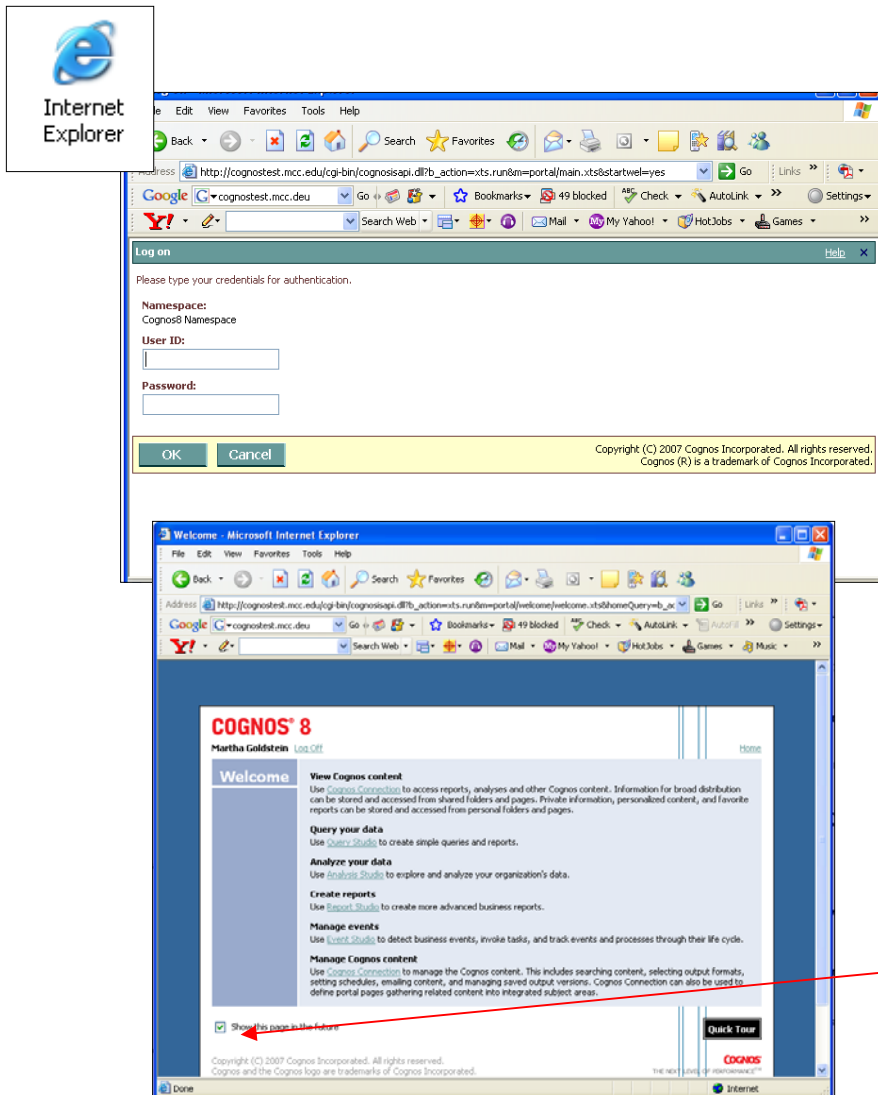
Refresh List View Details View New Folder New Job New URL New Page Cut Copy Paste Delete Set Order Properties - Public Folder

Navigation Bar

Entries: - [Go To](#) [First Page](#) [Previous Page](#) [Next Page](#) [Last Page](#)

Beginning Range of Reports on this screen Ending Range of Reports on this screen

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Step 1: Login to Cognos 8

Double Click on the Internet Explorer Icon. Type in the following URL Address:

<http://cognos.mcc.edu>

Enter your “**User ID**” and “**Password**”

- Your UserID will be the first letter of your first name and your full last name with no spaces (e.g. jdoe).
- The default Password for your first login is mottcc (you will then be prompted to change your password to one of your choosing - something you can remember after your initial login. Memorize your password!)

Click **OK**.

When you get to this screen, **uncheck** the box next to Show This Page in the Future (at the bottom of the screen)

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COGNOS 8
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Welcome

View Cognos content
Use [Cognos Connection](#) to access reports, analyses and other Cognos content. Information for broad distribution can be stored and accessed from shared folders and pages. Private information, personalized content, and favorite reports can be stored and accessed from personal folders and pages.

Query your data
Use [Query Studio](#) to create simple queries and reports.

Analyze your data
Use [Analysis Studio](#) to explore and analyze your organization's data.

Create reports
Use [Report Studio](#) to create more advanced business reports.

Manage events
Use [Event Studio](#) to detect business events, invoke tasks, and track events and processes through their life cycle.

Manage Cognos content
Use [Cognos Connection](#) to manage the Cognos content. This includes searching content, selecting output formats, setting schedules, emailing content, and managing saved output versions. Cognos Connection can also be used to define portal pages gathering related content into integrated subject areas.

Show this page in the future [Quick Tour](#)

Step 2: Enter Cognos Connection

After you uncheck the box, click on **Cognos Connection**. When you launch Cognos in the future you will not see this screen – you will go directly into Cognos.

There are many parts to the main Cognos Screen. Please look at **page 4** of this guide to see how all of the different tool bar and buttons work.

During your first login session, you will setting up Portal Tabs for both Datatel and Warehouse reports. After your setup in the system, these steps will not need to be repeated in the future.

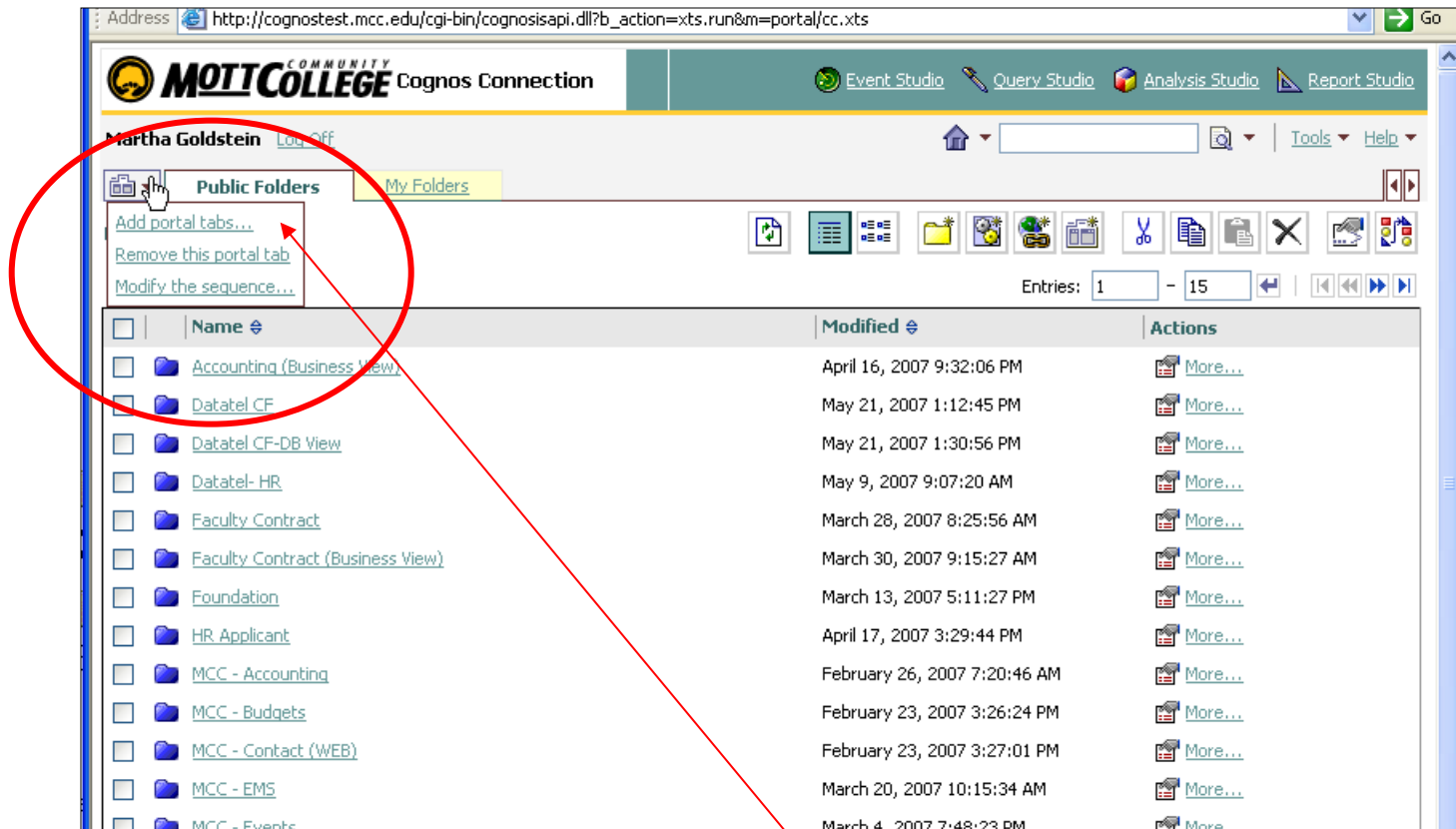
MOTT COLLEGE COMMUNITY TEST Cognos Connection TEST

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Public Folders > Public Folders > Datatel > Datatel CF

| Name | Modified | Actions |
|--------------------------------------|--------------------------|---------|
| Notification Reports | May 29, 2007 3:24:59 PM | More... |
| XCCF | May 29, 2007 3:25:08 PM | More... |
| XDET | May 29, 2007 3:24:59 PM | More... |
| XGSA | May 29, 2007 11:07:46 AM | More... |
| XPOI | May 29, 2007 3:25:08 PM | More... |
| XACT - Activity Description Download | May 29, 2007 3:25:00 PM | More... |
| XAPD - Approved Listing | May 29, 2007 3:25:09 PM | More... |
| XAPL - GL Account Pooling | May 29, 2007 3:25:08 PM | More... |
| XBPS - Blanket Purchase Order Status | May 29, 2007 3:25:00 PM | More... |
| XCAL - Approval List | May 29, 2007 3:25:08 PM | More... |
| XCCE - Cost Center List Of Expenses | May 29, 2007 12:25:34 PM | More... |
| XCCP - Cost Center Profit | May 29, 2007 3:25:08 PM | More... |
| XCFR - Cash Flow Report | May 29, 2007 3:25:09 PM | More... |
| XCHL - AP Check Labels | May 29, 2007 3:25:08 PM | More... |
| XDTR - Daily Transaction Report | May 29, 2007 3:25:01 PM | More... |
| XDLMPVEN | May 29, 2007 3:25:00 PM | More... |
| XDVP - Print DVP | June 7, 2007 1:12:38 PM | More... |

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Step 3: Initial User Setup

Click on the icon in the top left corner of the screen and select **Add Portal Tabs**.

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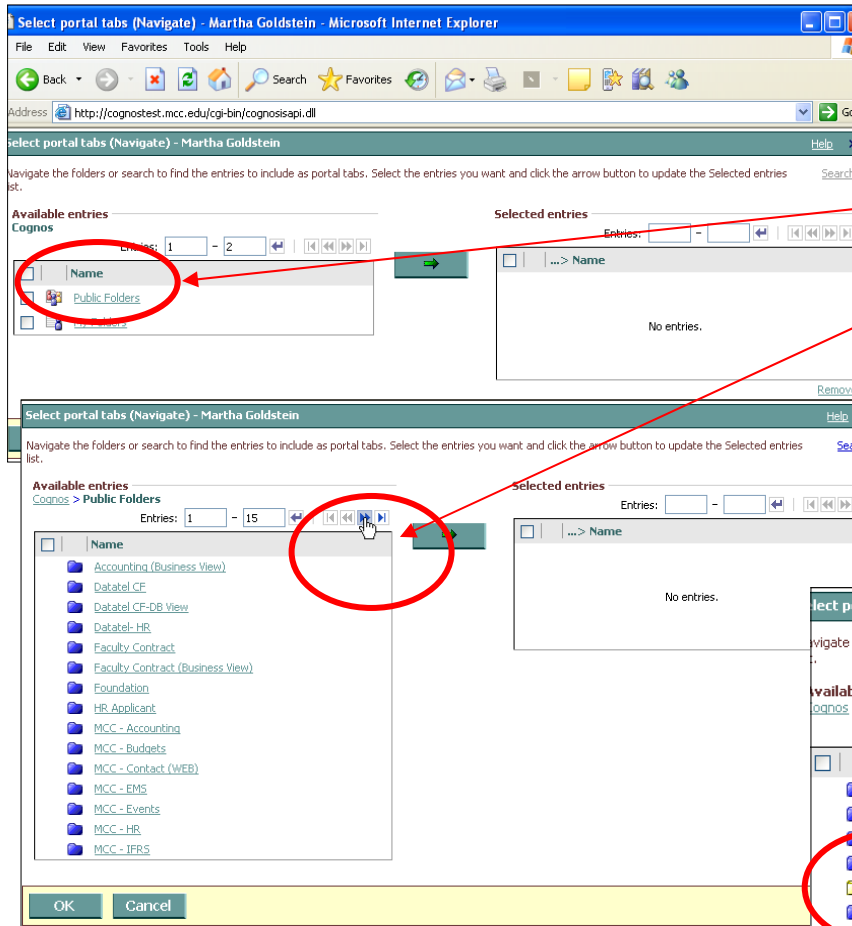
Step 4: Using Public Folder to Add Portal Tabs

During your first Cognos session, you will need to take these steps to set up the additional portal tabs.

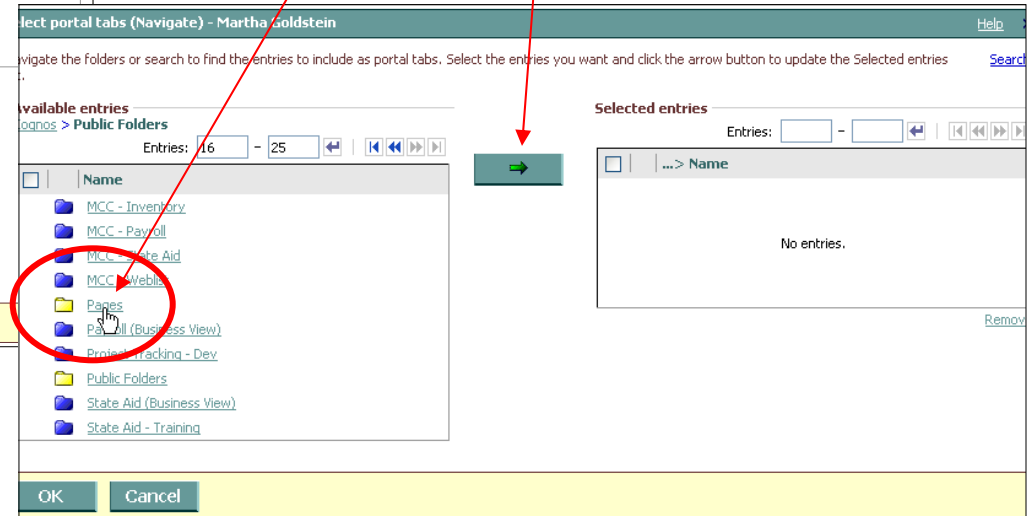
Click on the **Public Folders** link to get the next screen.

Use the double blue right arrows to see the additional pages available.

When you see the Yellow folder called **Pages**, select the folder, then touch the Green arrow in the middle to move it over to the Selected entries area..



Click on the **page forward** button as needed, until you find the yellow folder named **PAGES**.



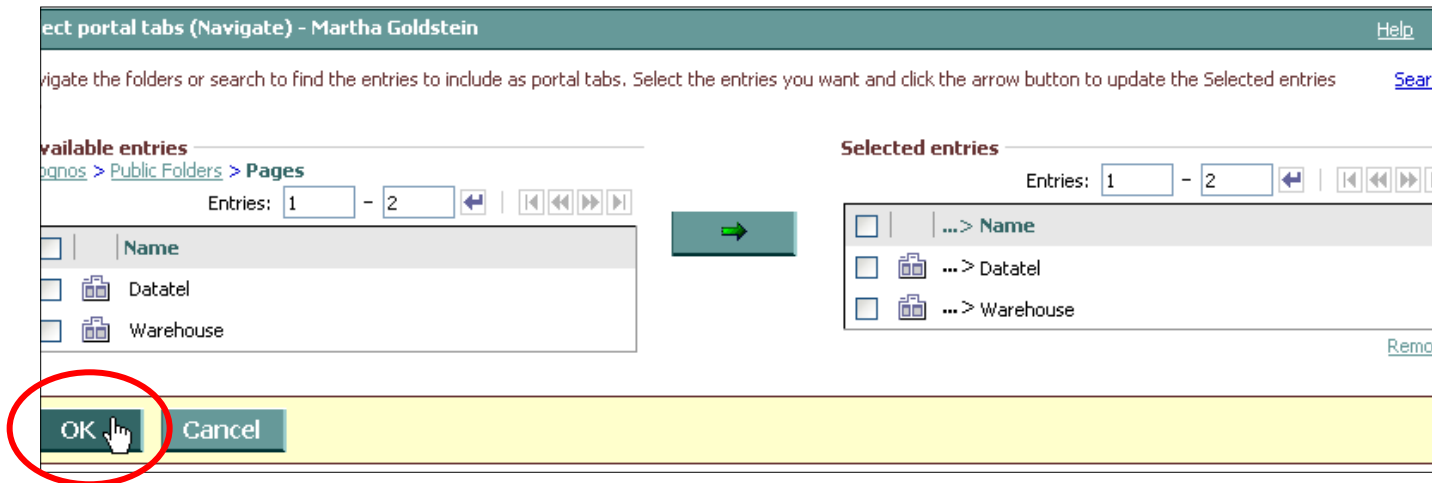
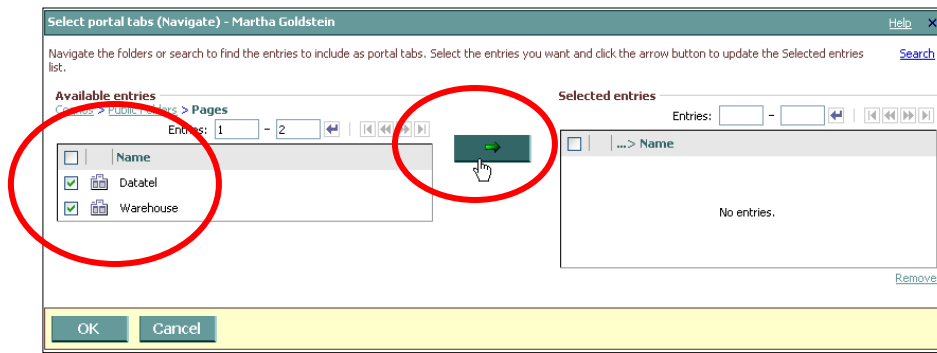
Job Aid: Introduction to Using Cognos 8

Step 5: Adding Portal Tabs

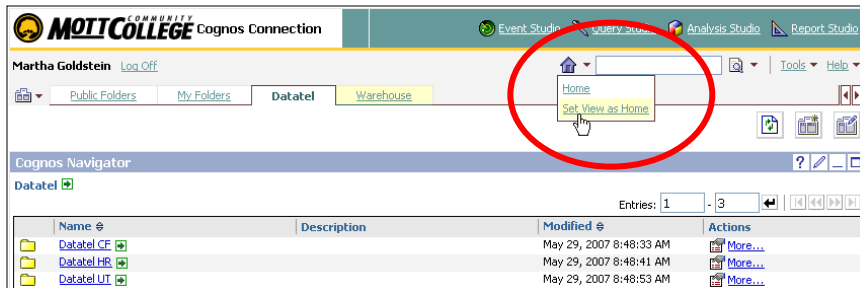
Check the boxes next to the **Datatel** and **Warehouse** Folder Names.

click the Green Arrow icon in the center of the screen.

Then click the **OK** button.

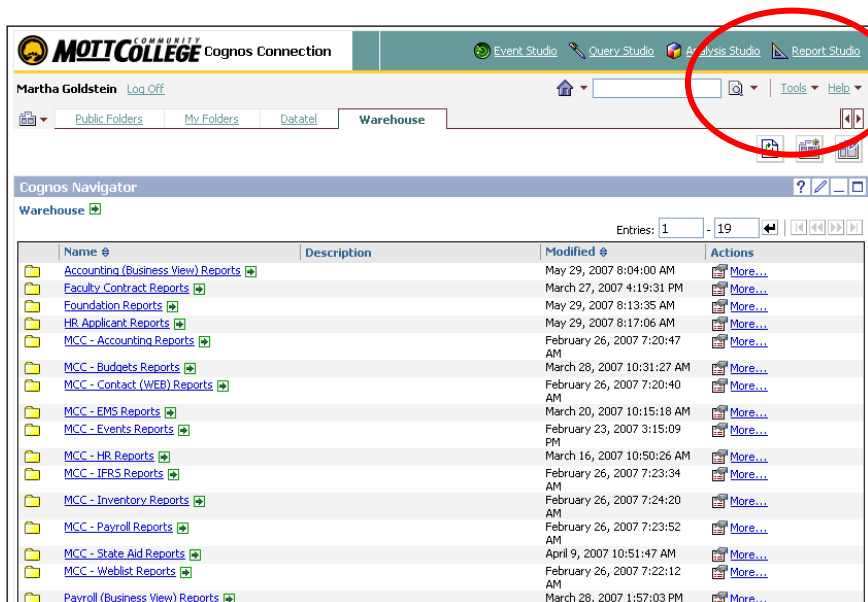


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Step 6: Set View as Home

To ensure that when you login to Cognos you will go directly to the screen you use the most, click on the tab you prefer (Datatel or Warehouse), and then go to the House icon – click on the Down Arrow. Click on the **Set View as Home** link. This will allow you to come to the same page when you enter Cognos each time.

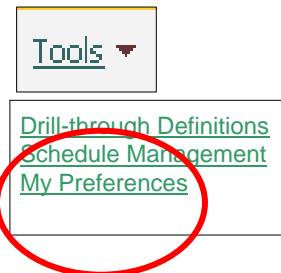


Step 7: Setting Your Preferences

Go to the **Tools** area on the screen and click the Down Arrow to the right.

Select My Preferences

You will see all of the different Preference Setting you can choose from on the next page.



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Set preferences

General Personal Portal Tabs

Specify your settings.

Number of entries in list view:
70

Separators in list view:
Alternating backgrounds

Style:
Corporate Preview

Report format:
PDF

Automatic refresh rate in seconds:
30

Show the Welcome page at startup
 Show a summary of the run options

Portal

Default view:
 List
 Details

Number of columns in details view:
3 columns

Regional options

Product language:
 Use the default language
 Use the following language:
English

Content language:
 Use the default language
 Use the following language:
English (United States)

Time zone:
 Use the default time zone

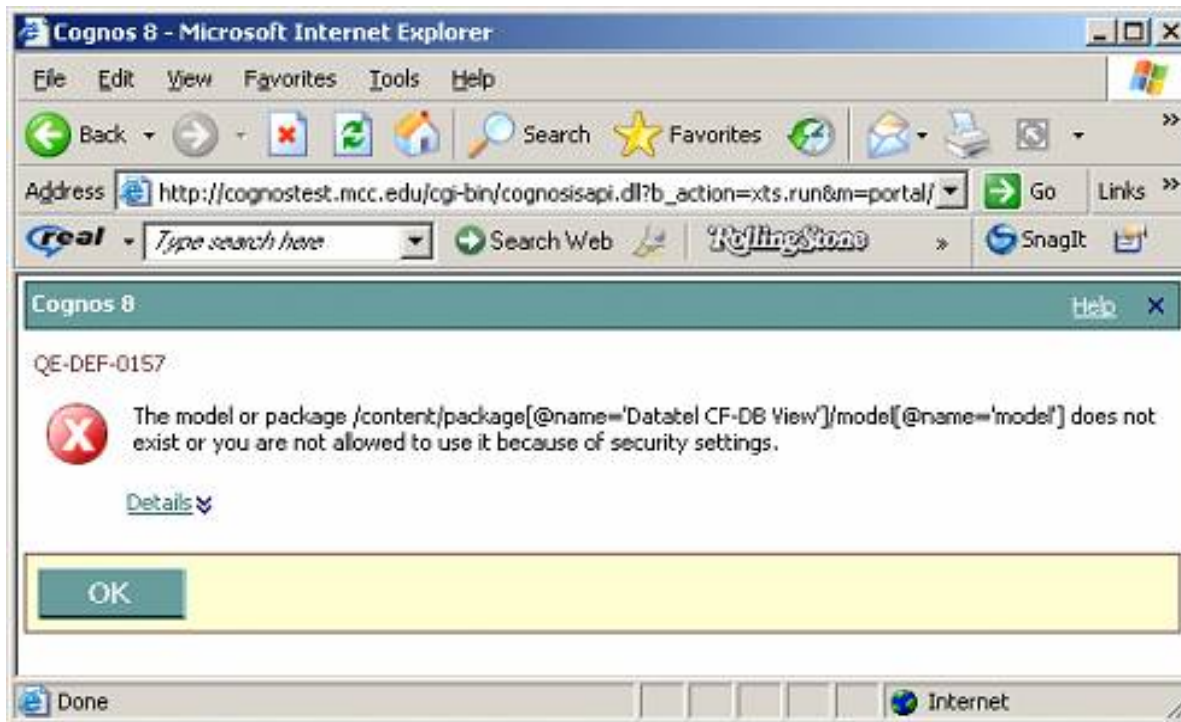
OK Cancel

Step 7b: Set Preference Options

The first area of the report allow you to specify some of your chosen default settings like:

- The **Number of Entries in List View** (it's recommended that you increase the number to 100 or more to reduce the need to page through a long list)
- **Separators in List View** – it's recommended that you use the "alternating backgrounds" choice to make your list easier to view.
- **Report Format** – this allows you to choose a default view when you run a report.
 - Use the Excel single sheet option if you often work with your data in spreadsheets;
 - use PDF if you often print reports to give to others;
 - Use HTML if you usually just view the report data on the screen (recommended for the faster performance).
- Most of the other settings will remain the same as the default...if you don't like your choices, you can use **Tools, Preferences** to change your settings in the future.

Note: YOUR ACCESS TO REPORTS IN COGNOS IS BASED ON THE SECURITY PERMISSIONS SET UP IN THE SYSTEM. IF YOU GET THE MESSAGE BELOW, YOU HAVE TRIED TO ACCESS A REPORT YOU DON'T HAVE PERMISSION FOR. TO ADD/CHANGE SECURITY PERMISSIONS, PLEASE HAVE YOUR MANAGER CONTACT THE ITS HELP DESK AND ASK FOR A WORK ORDER TO BE CREATED TO ADD SPECIFIC ITEMS TO YOUR ACCOUNT.



XDVP - Direct Payment Voucher - Prompt Page

Select the PO's Numbers you want to view:

Keywords:

Type one or more keywords separated by spaces.

055 Search

Example

Options

- Starts with any of these keywords
- Starts with the first keyword and contains all of the remaining keywords
- Contains any of these keywords
- Contains all of these keywords

- Case insensitive

Results:

- P0003055
- P0004055
- P0005055
- P0005506
- P0005507
- P0005508
- P0005509
- P0005510
- P0005511

[Select all](#) [Deselect all](#)

Choices:

Empty box for choices

[Select all](#) [Deselect all](#)

Cancel

Finish

Step 8: Using Prompts

Depending on the report you select you may see Prompt Pages before your report runs.

Prompt Pages allow you to narrow down your search. This example page has a combination of Type in Search Box and Select from Results.

Prompt pages can have calendars, or other types of drop downs.

If you have questions about Report Prompts or other issues with MCC Cognos Reports, contact the Cognos Power User in your area.