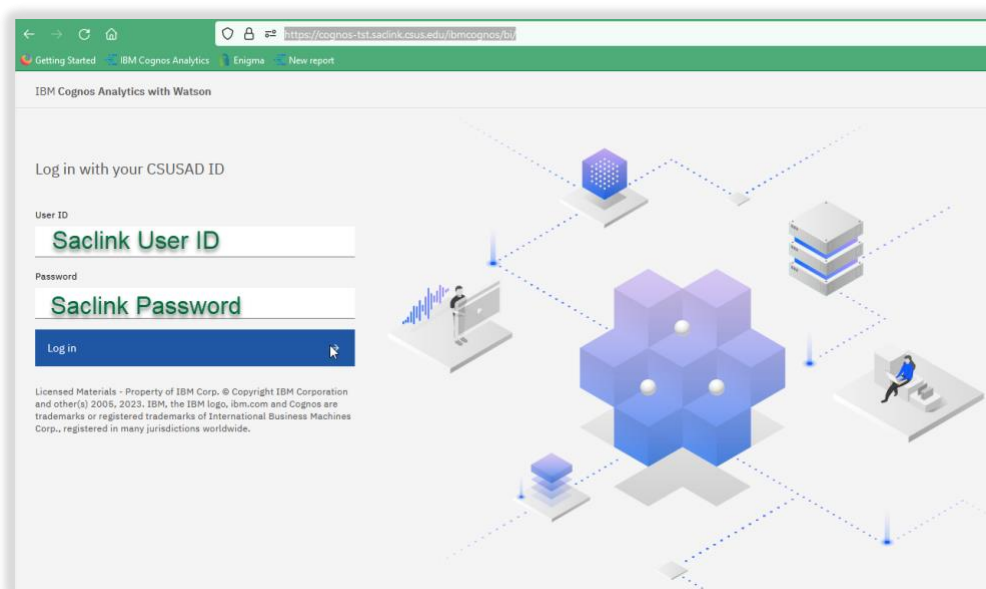
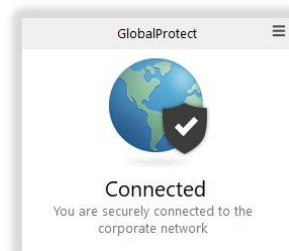


Sacramento State University and IRT University Reporting is excited to share that we are updating the IBM Cognos Analytics to 11.2.4 in December 2023. The look and feel have changed. You can preview the new Cognos tool before Production is upgraded by logging in to our Cognos Test instance at (<https://cognos-tst.saclink.csus.edu/ibmcognos/bi/>).



The Login Page

The login page has slightly changed. Just like all Sac State applications, you will use your Saclink user ID and Saclink password to gain access to the Cognos web application. Please note, you **MUST** be connected to Global Protect to even see the Cognos login page. In IRT, we take data security seriously and require that users be verified as authorized Sac State people before logging in. If you're working remotely or working on campus on a laptop connected via wi-fi, you must be logged into Global Protect. If you are on campus with a desktop machine and plugged in with a network jack, you should be automatically connected to Global Protect.



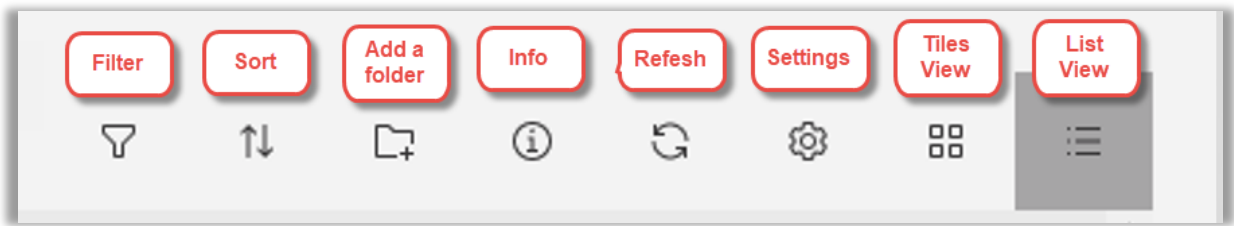
Once you log in, you will see the new **Content homepage**. This homepage has four tabs along the top:

- **My Content** - reports and views you have saved with your preferred prompts
- **Team Content** - The main Data Warehouse curated reports
- **Samples** - IBM's sample reports
- **Most Recent** - Reports that you have recently run

The Team Content is dynamically inherited from the CMS security roles. Access to these content specific folders is requested through the [CARS Security Request](#)

The default homepage takes you to the Team Content, where the report catalog resides.

The new upgrade gives you opportunities to organize your report menu display preference.



The icons from left to right are:

Filter – You can filter by report types or dates

Sort – Sort alphabetically, by type or by modified date

Add a Folder (add to your 'My Content' section)

Info – Gives you folder information

Refresh - the list

Settings – When in the List View, you can select **Compact, Short and Default**

Tiles View – This puts folders and reports into squares

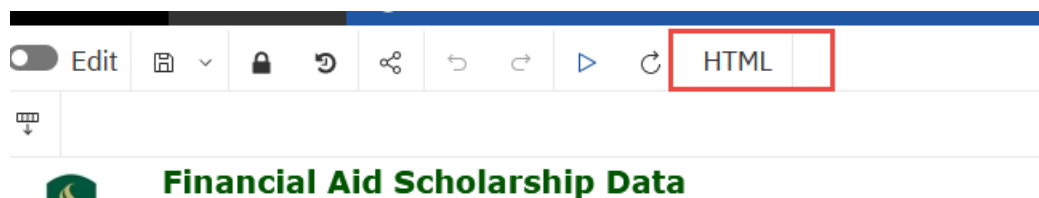
List View – This puts the folders and reports into a long list

One handy enhancement for the upgrade is the new navigation path at the top of the page. This makes it easy to share the folder location with co-workers. It is also helpful if you are requesting an enhancement to the report.

Running a Report

Just like the previous version of Cognos, once you select the link of the report it looks almost identical. Many reports take you to a Confidentiality Agreement Page. Then, the report will often take you to a prompt page where you customize filters for the results to what you need. If you see a red asterisk on the prompt page, that indicates this prompt is a required field. When you've made all filter selections, click Finish and your report will run.

The report will run to the HTML format that you view in the web browser. Reports can also be run to PDF, Excel (This includes page headers, color schemes, and logos), Excel Data (This is just the report data with the table headers), CSV and XML.



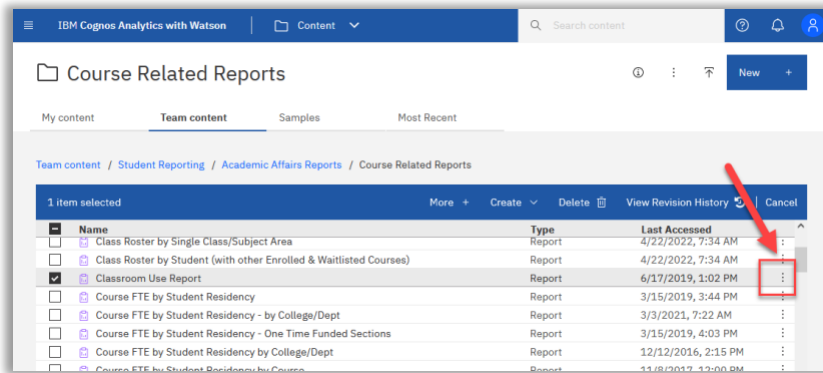
While in the HTML report views, you can click on the 'HTML' word and get a drop-down of other report formats: PDF, Excel, Excel Data, CSV and XML.

Saving a Report View

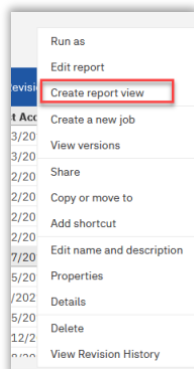
Report Views and schedules are just like the previous version of the report.

For reports that you run often, you can save a public report to your My Content section. You can then edit the saved report and set your prompts so that you no longer need to navigate through the report content to select them each time.

To save a report view, Right Click on the report name, or click on the ellipses.



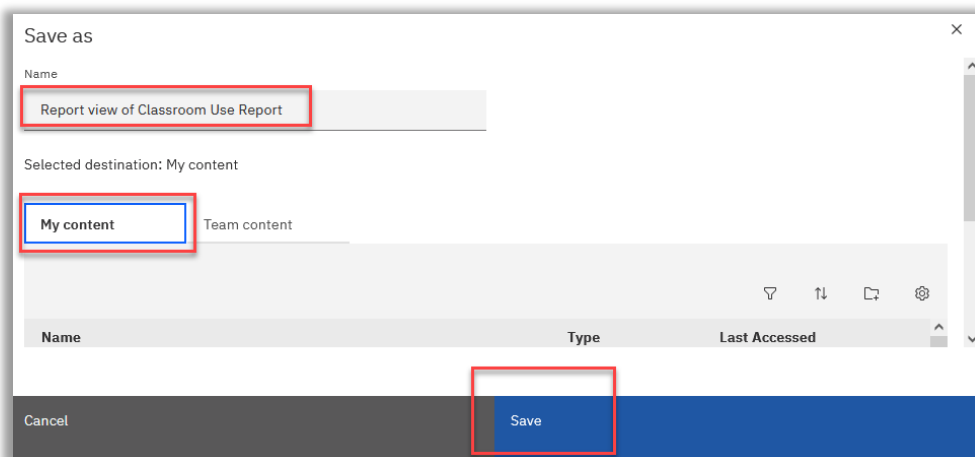
From the Menu, select "Create report view"



In the pop-up dialog box, you can modify the name of the report. Some users add the term when they create a report for a specific term

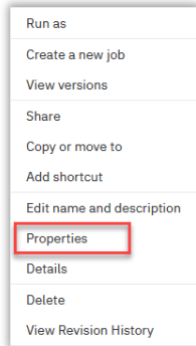
Change the destination to "My content"

Select "Save"



You also have the option to define your prompt values on your report, so you don't have to choose the prompts each time you run them.

Right click on the report in your 'My Folders' or click the ellipses. Select properties



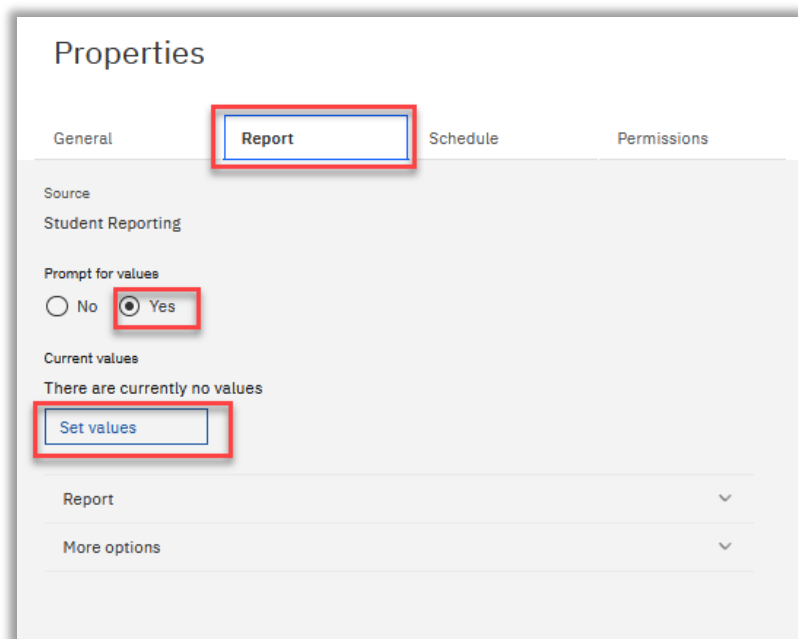
From the Report Properties page, select the Report tab

Make sure Prompt for Values is set to "Yes"

When you click on "Set values", you will be taken to the report to run.

When you are done, click on the blue Save button in the upper right corner.

You can also set the report output format on this page.



You can also schedule the report to run regularly. Remember, if you schedule the report to be e-mailed to you, make sure there is no personal student identifiable information included in the e-mail attachment. That is a violation of the FERPA guidelines.

Here is a sample page of a report Schedule on the Schedule Tab:

Report view of Graduation - Degrees Awarded by Department/College

Schedule Options Prompts

Frequency

Type Weekly

Repeat every 1 week

Repeat on

Monday Friday

Tuesday Saturday

Wednesday Sunday

Thursday

Daily time interval

Period

Start 2023-11-09 5:29 PM

No end date

Select the highlighted options.

Here is the Options tab:

Report view of Graduation - Degrees Awarded by Department/College

Schedule Options Prompts

Find

Format

Use default format

HTML PDF Excel

Excel Data CSV XML

Accessibility

Enable accessibility support

Delivery

Save

Save report

Save report as an external file

You can save the report in different formats and on the date/time you specify, the report will be generated for you in your My Content area.

Please contact university.reporting@csus.edu if you have any further questions.