Cognos Reports Overview

This is a summary of course **PHCMNAV108: Cognos Reports**, which can be found on the UCPath website, on the training page at: *ucpath.berkeley.edu/tools-resources/training-resources-and-help*.

To find the link to the course, select the link to Position Management or Position Funding and Updates and Direct Retro and then navigate to the "Cognos Reports" link in the list.

This job aid introduces the basic layout and navigation of Cognos reports for UCPath, including accessing and running a report, scheduling a report, viewing report output, saving report output, and exporting report output to Excel.

Access

- Access to Cognos reports is provisioned by the UCPath team and is based on your security role in UCPath
- Row level security in Cognos limits your access to data rows that appear in the report output the same way your access to data rows is restricted in UCPath
- To request Cognos access , request it from your Regional Service Director (list of directors is available online at vca.berkeley.edu/initiatives/berkeley-regional-services)

Browser Settings

- Internet Explorer is the recommended browser by UCPath, however Chrome will also work
- Don't user the back and forward arrows in your browser to navigate within Cognos, use the links and toolbar navigation within Cognos
- Depending on your screen resolution you might need to use scroll bars to show additional report info and zoom features to adjust report views
- If you have pop-up blockers on in your browser, this could impact how Cognos runs
- There are job aids available on the UCPath website that will walk you through the best browser settings for IE, Chrome, Firefox, and Safari - to access the job aids, log in to the UCPath Portal and choose "Help / FAQ" and follow the prompts to get to the job aids

Questions

- If you have questions about using Cognos reports, you can contact the UCPath team by:
- Logging in to the UCPath Portal, going to "Help/FAQ", then "Ask UCPath Center", then "Submit an Inquiry"
- Calling the UCPath Center at 855-982-7284 ((Monday–Friday, 8 a.m.–5 p.m. PST) to speak with an associate
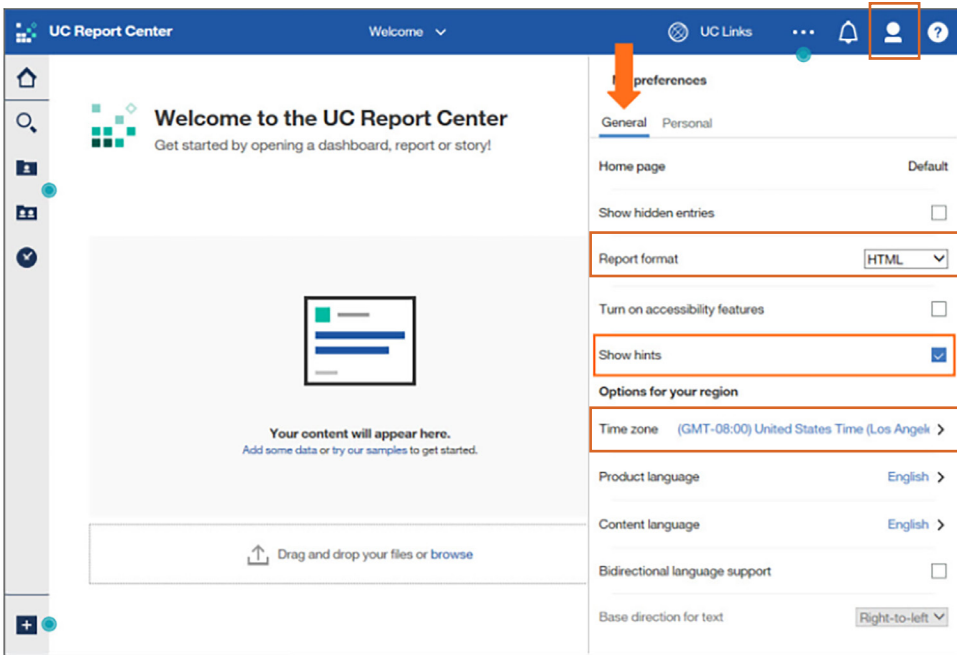
Log in to Cognos Reports

- To log in to Cognos Reports, go to ucpath.berkeley.edu, log in to the UCPath Portal using your CalNet ID and choose "Quick-links" and then "Cognos Reports"

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Service Date:
05/02/2011

Dashboard	< Quicklinks
PeopleSoft M	Payroll Calendars & Schedules >
Worklist	Benefits Deduction Calendar
Bookmarks	UCnet
Employee Ac	UCPath Center Jobs
Manager Act	UC Jobs
Forms Librar	UC Riverside
Quicklinks	UCOP
He	Cognos Reports
	Pension Choice or Savings Choice Election
	Notices and Updates

Home page icons

- The three dots open your settings for the report
- The bell icon is a notification button that will alert you when reports you have subscribed to have finished running
- The person icon at the top right is s preferences icon - this is where you can update your preferences, and sign out of Cognos Reports

- Home icon takes you to the default home page
- Search icon allows you to search for reports
- The folder icon with a person takes you to your personal folder "My Content"
- The folder icon with two people takes you to a folder called "Team Content" which is where you'll find the list of Cognos reports you have access to
- The clock icon shows your recent reports
- The center of the page will show recently opened reports
- The Quick Reference section shows general tips and references for using Cognos

UC Report Center   Welcome ∨   UC Links   ··· 🔔 👤 ❓

Welcome to the UC Report Center
Get started by opening a dashboard, report or story!

Quick reference

∨ Get started
▶ Overview
▶ Get started videos
> Sample data
> Support

Your content will appear here.
Add some data or try our samples to get started.

⬆ Drag and drop your files or browse

Preferences

- The person icon in the top right of the screen lets you access your preferences
- In your General Preferences, you can set your report format, turn the hints on and off, change your time zone
- The small teal dot means there's help info available
- If you want to disable these, turn off hints in your preference settings

- In your personal preferences, you can renew your credentials if you recently changed your password
- A message will confirm your credentials were updated with your current username and password
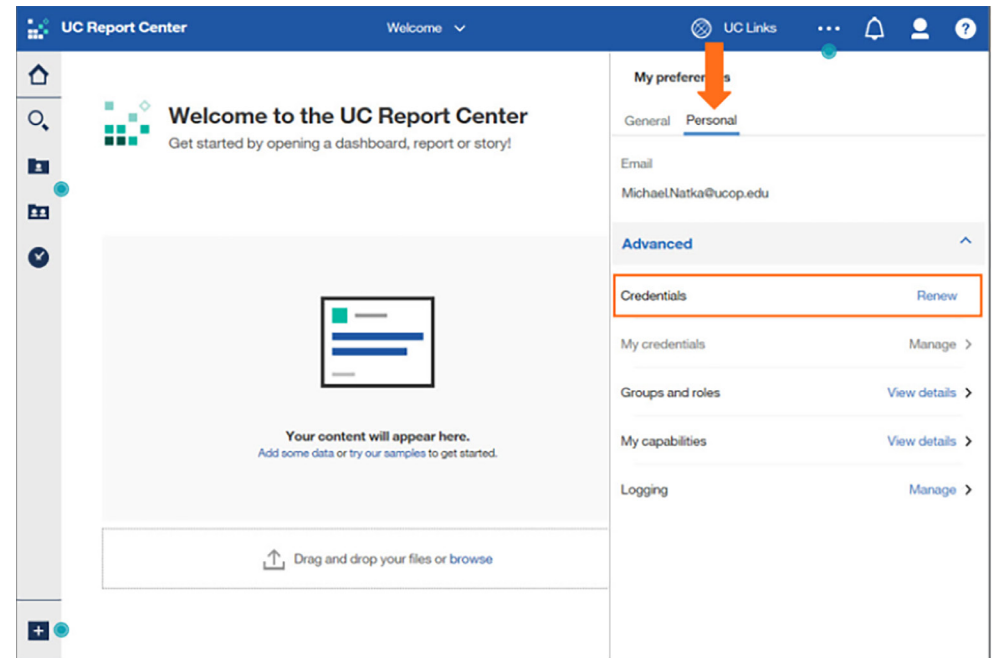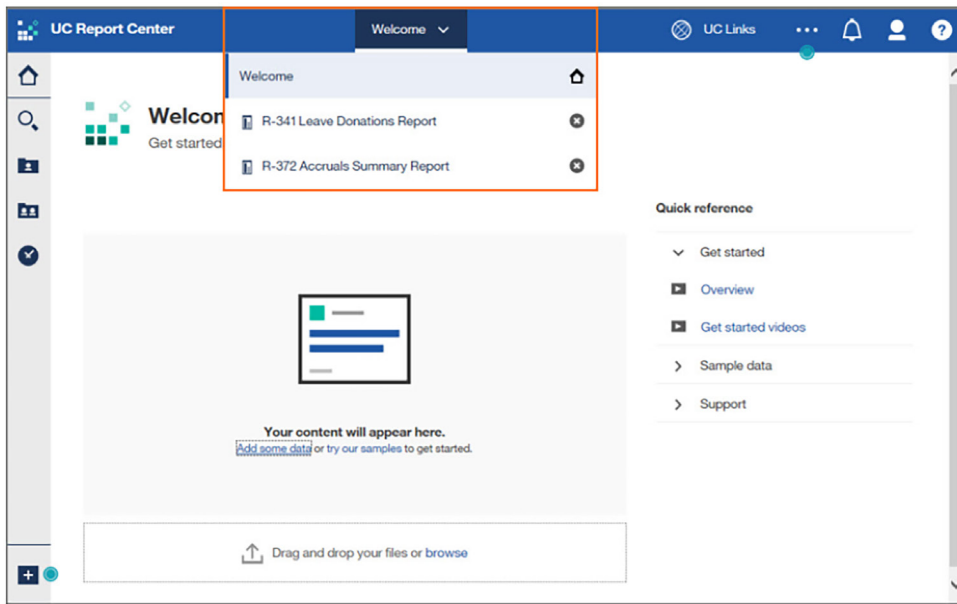
Welcome menu

- The drop-down in the "Welcome" button at the top of the page expands to show you open reports
- You can toggle between open reports here
- You can return to the home page from this drop-down or close reports

Search reports

- Click the search button on the navigation panel to open the search bar
- You can search reports by keywords
- Click on the icon that looks like a filter to sort the reports by type of object or by the date the report was modified
- You won't be able to click the filter icon until you search
- Click on the "Save" button to the left of the filter icon to save a search so you can access it again later
- Clear the search bar to find your saved searches
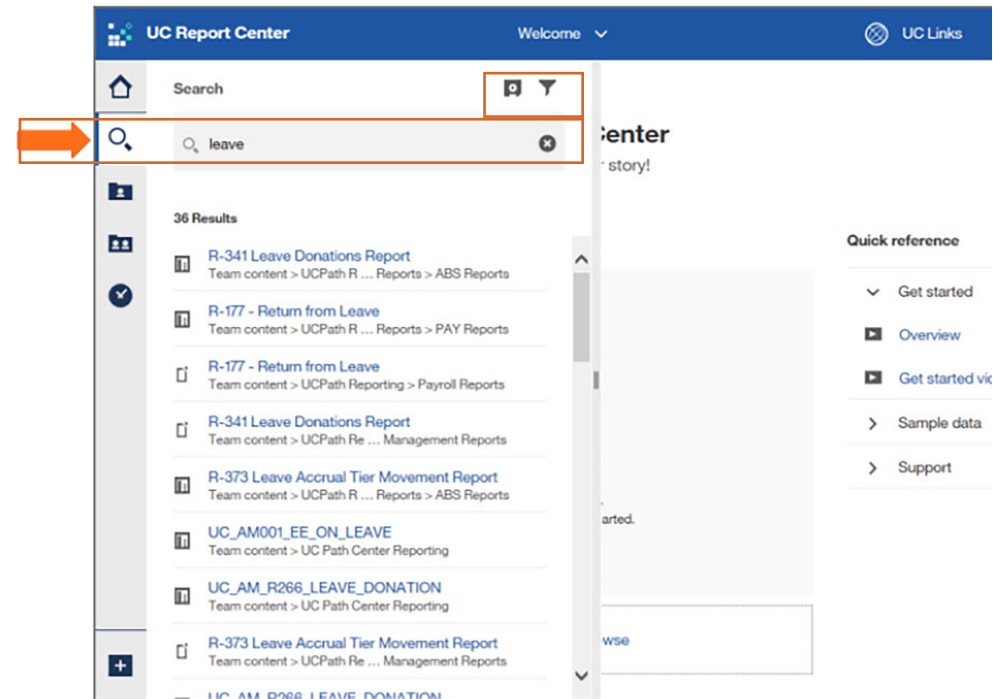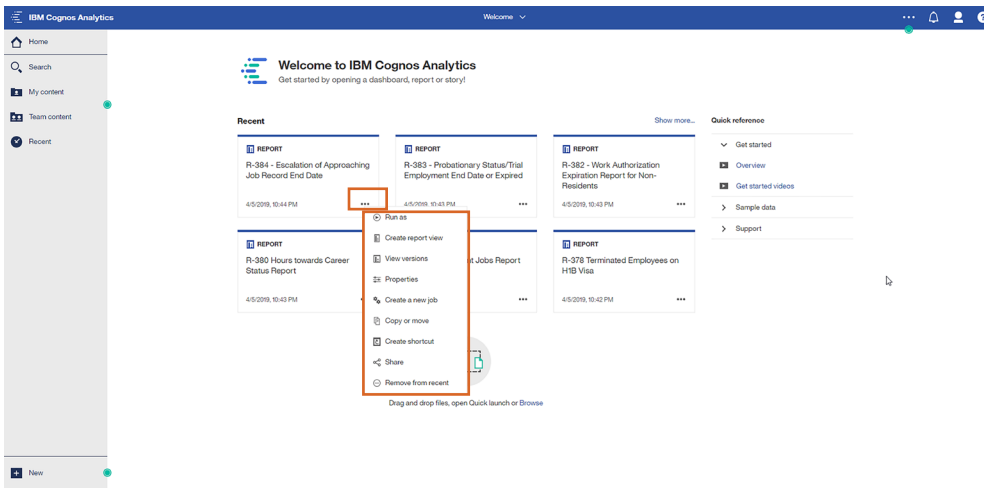
Open reports

- From the main report center, click on the three dots to display the "More" menu
- From the expanded menu you can
  - Run as - run the report in a specific format
  - Create a report view
  - View versions of the report
  - Display report properties
  - Get a shareable link to the report
  - Create a new run job

- There are a list of global UC reports available in the "Team Content Folder"
- Reports listed here will vary based on your security access level
- Click a folder in the list to see the reports listed within the folder
- The data you'll see within the reports depends on your access
- Breadcrumbs show at the top of the page, so you can track what level you're at in the folder
- You can click the breadcrumbs to return to that folder
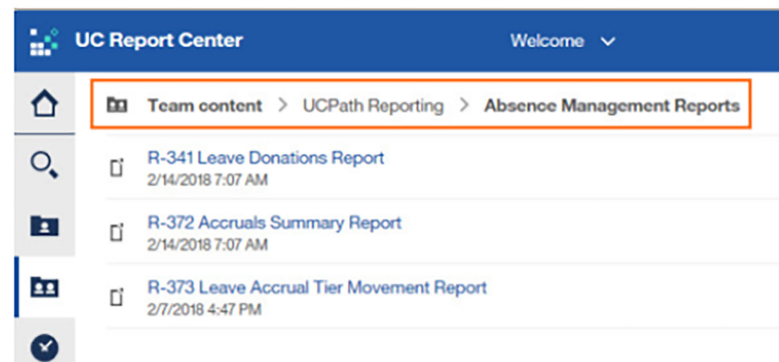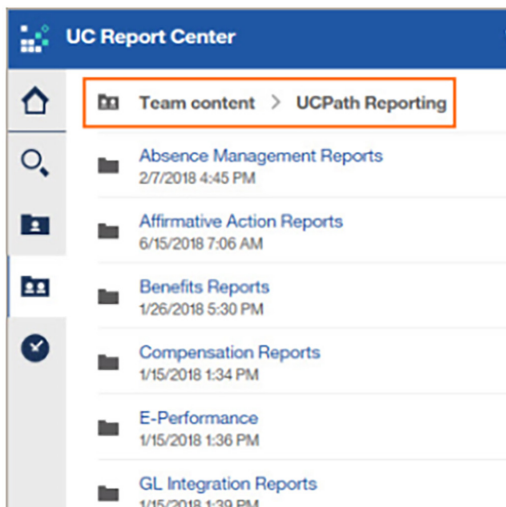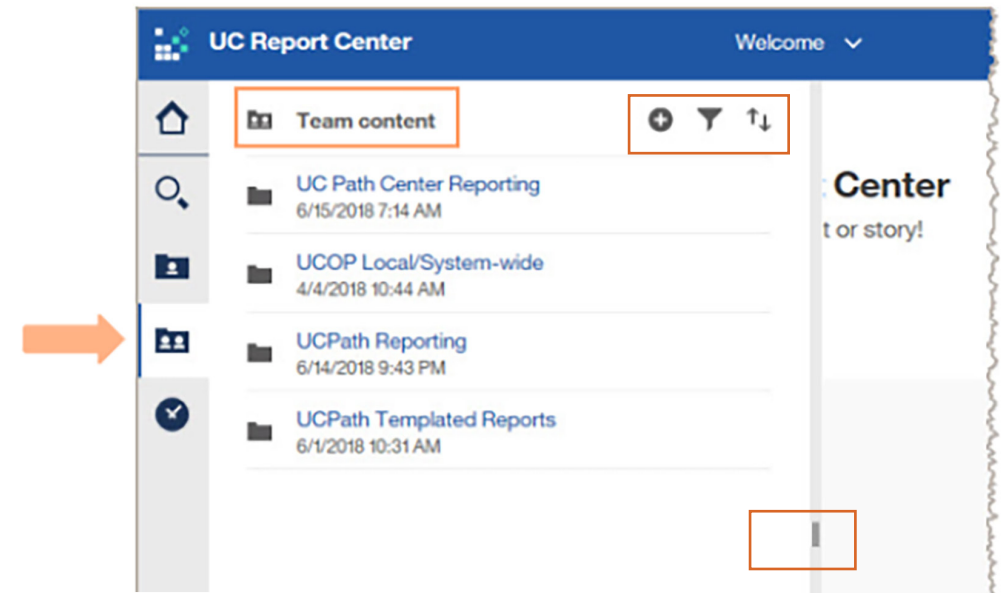
- The list of reports will default to list in alphabetical order
- You can change how the reports are listed by using the sort and filter icons at the top of the page
- You can change the size of the border to review the full names of the reports by pulling the folder pane to the right

5
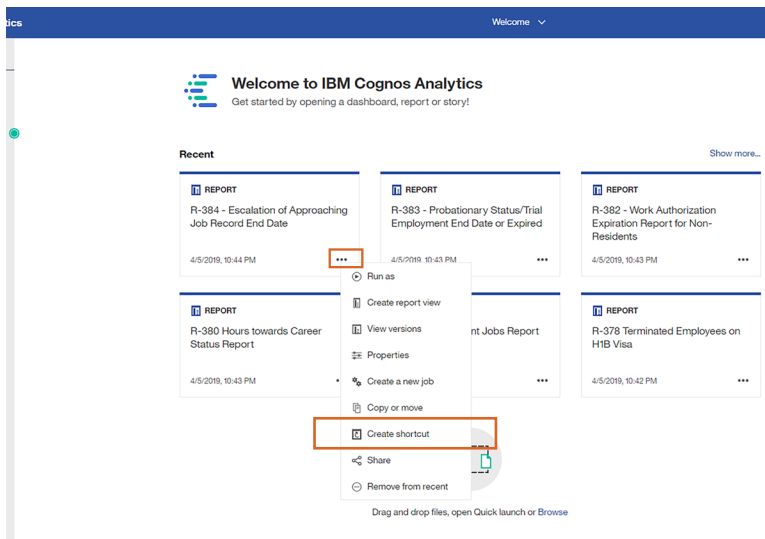
Create shortcuts

- From the main report center, you can create shortcuts to reports you use regularly by clicking the three dots and choosing "create shortcut" from the expanded report menu
- Save the shortcut to your "My Content" folder
- To save, select a destination when prompted and click "Create shortcut"
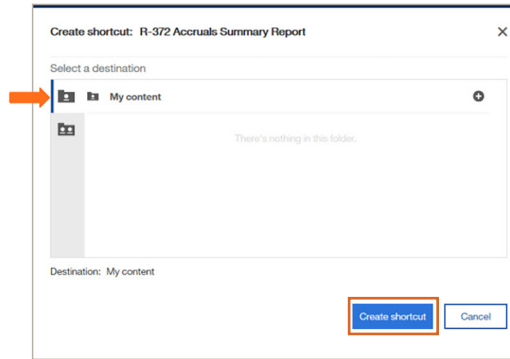
Running a Cognos report

- Click the report name to run the standard report or go to your "My Content" folder to run a version that you created
- Enter or verify your prompts
- Run the report by clicking "execute" at the bottom left

"Run as" feature

- Run the report in other formats by choosing "Run as"
- Go back to the report in your content folder or the search and click on the three dots
  - The default format for Cognos reports is HTML
  - You can choose to view reports in other formats such as PDF or Excel
- This box allows you to select a delivery method for your report if you don't want to wait for it to run
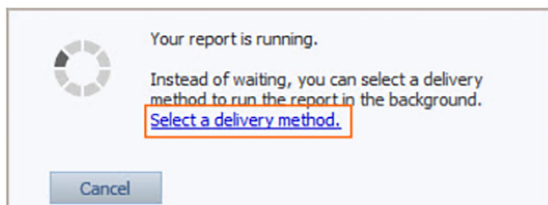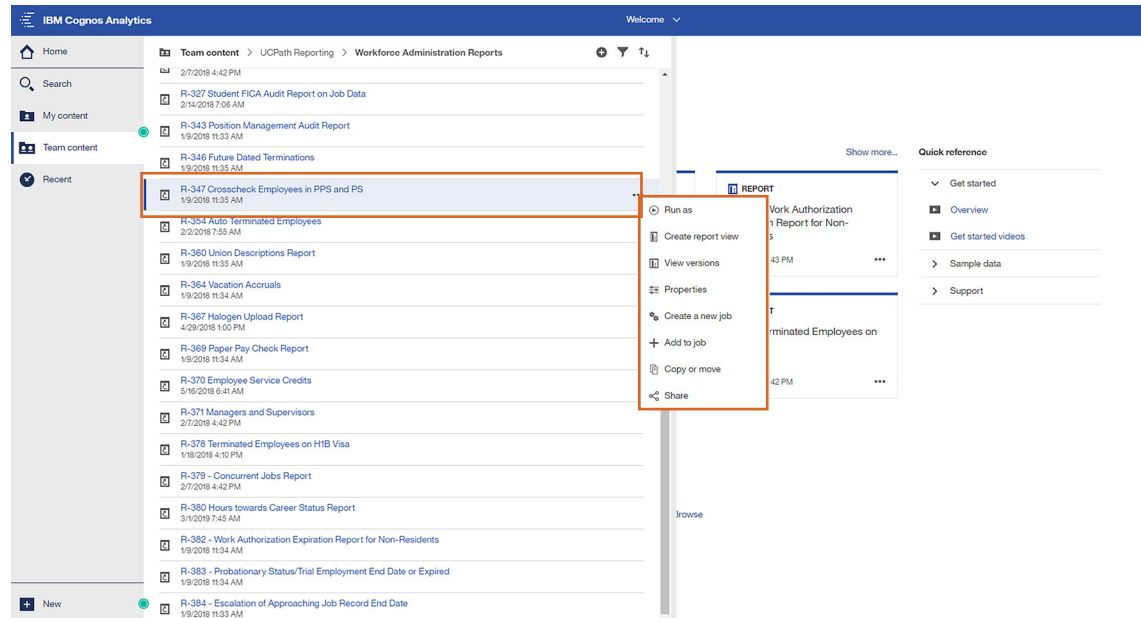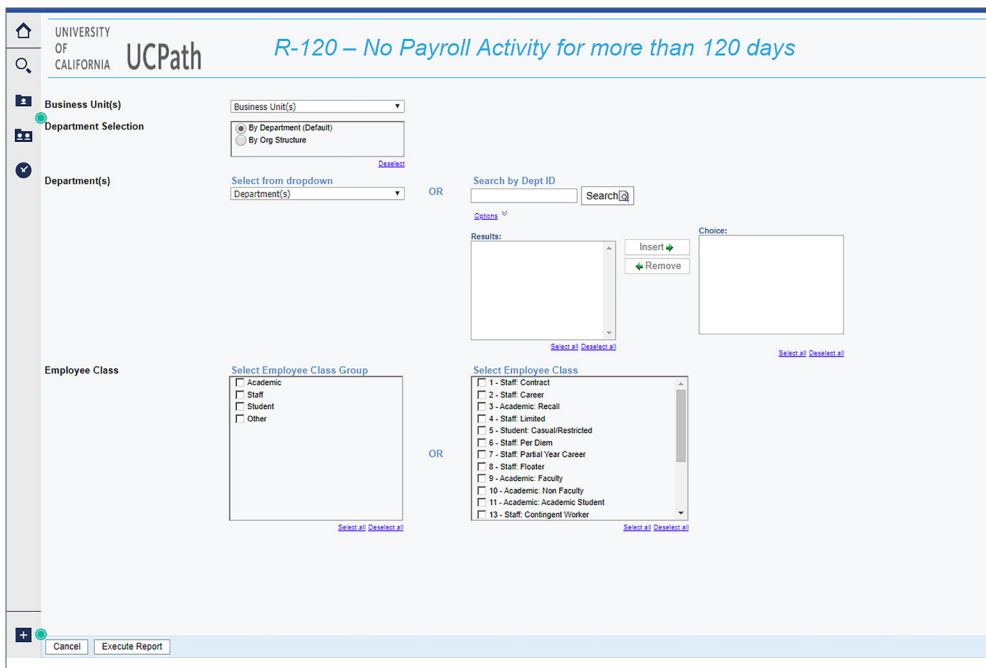
Report prompts

- Report prompts allow you to specify selection criteria for the report
- Some are required and some are optional
- An orange asterisk means that the prompt is required to run the report
- An orange arrow means a value hasn't been entered yet

example 1
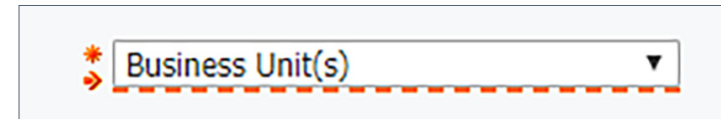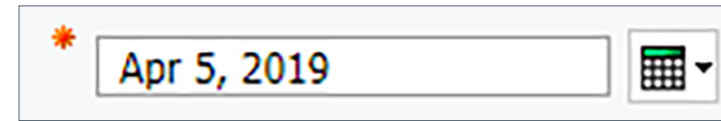
Report prompt types

- **Value prompt**: Select one or more values from a list
- **Search and select prompt**: Search for values and then select from the search results
- **Text box prompt**: Type a value
- **Date prompt**: Select a date or a range of dates
- **Tree prompt**: Select values from a hierarchical tree structure
- **Prompt combinations**: Select from multiple prompt types the prompt format that best suits the selection criteria and then select a value from the displayed list
- **Cascading prompt**: The values in one prompt determine the values available in the next prompt
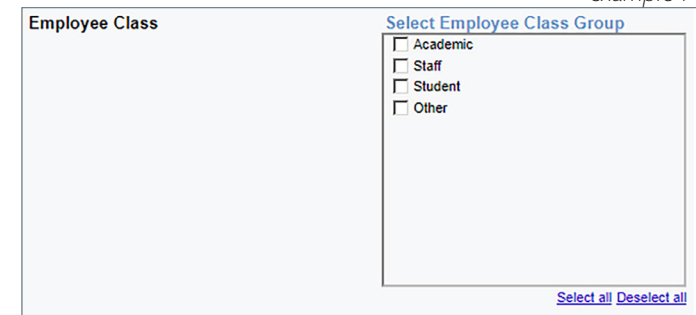
Value prompts
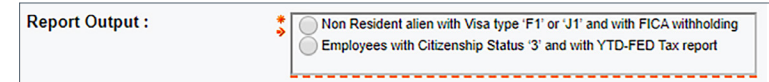
example 2

example 3

Search by Dept ID

Search 🔍

Options ⌄

Results:

(empty list box)

Select all Deselect all

Insert ➡
⬅ Remove

Choice:

(empty list box)

Select all Deselect all

Search and select prompt example

Department(s) By Org Structure

Select Level
- ◯ L1 DEPT
- ◯ L2 DEPT
- ◯ L3 DEPT
- ◯ L4 DEPT
- ◯ L5 DEPT
- ◯ L6 DEPT
- ● L7 DEPT

Deselect

Tree prompt example

	Enter Min No. of Months		Enter Max No. of Months
Current UC Service Months	0	TO	1200
Prior UC Service Months	0	TO	1200
Prior State Agency Service Months	0	TO	1200
Total UC Service Months (All Campus)	0	TO	1200
Total of all Service Months	0	TO	1200

Text box prompt example

Date of change

From
Apr 5, 2019 🗓⌄

To
Apr 5, 2019 🗓⌄

example 1

As of Date
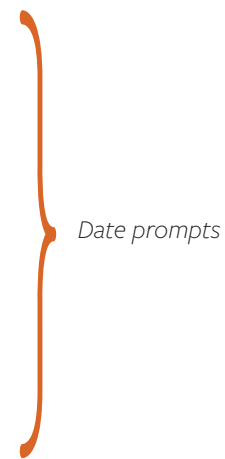
✳ Apr 5, 2019 🗓⌄

example 2

Date prompts

Department Selection

By Department (Default)
By Org Structure

Deselect

Department(s)

Select from dropdown
[All Department(s) ▼]   OR   Search by Dept ID
[   ] [Search 🔍]

Options ⌄

Results:
[   ]

[Insert ➡]
[⬅ Remove]

Choice:
[   ]

Select all   Deselect all   *Select all   Deselect all*

example 1

Department Selection

By Department (Default)
By Org Structure

Deselect

Department(s) By Org Structure

Select Level
○ L1 DEPT
○ L2 DEPT
○ L3 DEPT
○ L4 DEPT
○ L5 DEPT
○ L6 DEPT
○ L7 DEPT

AND

Select Dept by Level in ORG structure
[   ]

Deselect

example 2

Prompt combinations

Cascading prompts

Department(s) By Org Structure

Select Level
● L1 DEPT
○ L2 DEPT
○ L3 DEPT
○ L4 DEPT
○ L5 DEPT
○ L6 DEPT
○ L7 DEPT

AND

Select Dept by Level in ORG structure
UNIVERSITY - UNIVERSITY - Berkeley
UNIVERSITY - University Default
UNIVERSITY - UC Merced
UNIVERSITY - UNIVERSITY - Davis
UNIVERSITY - UNIVERSITY - UCLA
UNIVERSITY - Univ of CA, Ofc of President
UNIVERSITY - UC Riverside
UNIVERSITY - DEFAULT - ANR
UNIVERSITY - Associated Students, UCLA

Deselect   *Select all   Deselect all*

example 1

Business Unit(s)   [BUSINESS_UNIT ▼]

Department(s)

Pick from dropdown OR Search by Dept Id
[Select Department ▼]   [   ] [Search 🔍]

Options ⌄

Results:
[   ]

[Insert ➡]
[⬅ Remove]

Choice:
[   ]

Select all   Deselect all   *Select all   Deselect all*

example 2

example 3

Run Report

○ Six Month Salary Review Due Within Two Months
● Salary Review Date Lapsed During Last Three Months
○ New Separations Report
○ Appointment Changes Report
○ New Hire Report

Report output

- After you fill out your prompts and execute the report at the bottom left, you'll see the output in HTML format

- To change the report format, choose "Run as" from the play button icon at the top of the screen and pick the format you'd like to see the report output in

  - The PDF format is easy to share and includes page numbers

  - The Excel format is recommended if you're extracting data

- Run a separate report with different prompt values by choosing "Reset prompts and run"

- Use the link in the lower left corner to scroll through the pages
- **Top:** displays the first page of the report
- **Page up:** displays the previous page of the report
- **Page down:** displays the next page of the report
- **Bottom:** displays the last page of the report

Save your report view

- Choose "Save report" icon from the top left
- When prompted, enter the name of the report in the "Name" field and then select the folder you'd like to save it to
- You're only able to save it to your folders within your "My Content" folder - you can't save report views to the Team Content folder

In the **Name** field, accept the default name or type a new name for the report.

Click the **Select My Folders** link to save the report to the **My content** folder.

Settings

- Click the three dots in the upper right hand of the report page to access settings
- From here you can
  - Set a report as your home page report
  - Share the report
  - Embed the report in a webpage
  - Subscribe to scheduled reports - so you are notified when the reports have run

Share the report

- Choose share and the copy the link when prompted

Subscribe to the report

- If you want to run the report on a regular basis such as ever week or every month
  - Select the days of the week and the time when the report should begin
  - Select the format you want to receive the report in
  - Select the delivery method you'd like to receive the report by
  - Select prompts to review the parameters you selected when you ran the report