ENTERPRISE DATA AND ANALYTICS
Illinois State University

IBM Cognos Analytics

Admissions & Intro to Report Editing – Participants Guide

Welcome to ***Cognos - Admissions and Introduction to Report Editing***!

Today's objectives include:

- Gain a Basic Understanding of Cognos
- View a Report
- Modify a Report
- View a Dashboard
- Request Access to Cognos

Supported Web Browsers

Cognos supports most major browsers with the exception of Microsoft Edge and Mozilla Firefox's recent releases.

Check the home page of our website AT.IllinoisState.edu/EDA for up-to-date browser issues.

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Guided Instruction

The following instructions cover the basic layout of Cognos and how to view and edit reports.

A. Overview of the Welcome Page

Navigate to Cognos

For this training session, we will be viewing reports in the Test environment of Cognos.

1. Open Google Chrome
2. Go to insight-test.ilstu.edu.
3. Use the ***Select Namespace*** dropdown to select ***ADILSTU***.
4. You will be given a training log in and password.

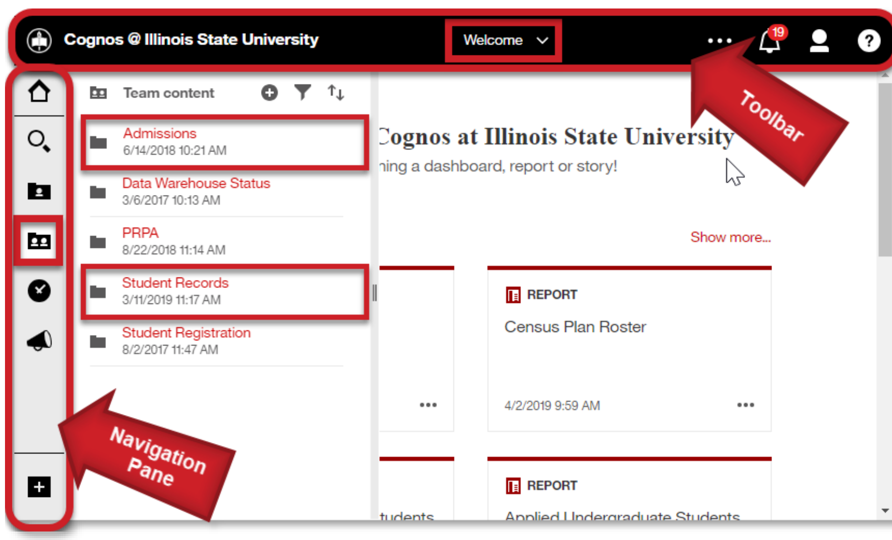
The Welcome Page

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

Welcome Page Toolbar

Welcome – Toggle between the Welcome screen (Home icon) and reports/pages that you have accessed since logging in. *Pages will not be retained after clicking the refresh button on your browser or logging out.*

- ***More*** – More dots icon will contain options for each page.
- ***Notifications*** – Saves the last 20 delivered report subscriptions.
- ***Personal Menu*** – Individual user preferences such as editing subscriptions, editing home page, and signing out.



Navigation Pane

- ***Home*** – Returns users to the Home/Welcome Screen.
- ***Search*** – Search for a report by either entering the title of a report or a data item that appears in the report.
- ***My Content*** – Reports users edit and/or create 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*** – Access managed reports in the Admissions package as well as create new reports with Admissions data.
  - ***Student Records folder*** – Access managed reports in the Records & Enrollment package.
- ***Recent*** – Houses the user's twenty most recently viewed reports.
- ***News and Alerts*** – Enterprise Data and Analytics' (EDA's) website home page. Check here for known issues that arise, new reports, and training resources.
- ***New*** – Ad hoc users create new reports, dashboards, or data modules.

B. View a Report

The following instructions cover the demonstration of how to view a report that has been previously saved in Cognos. The information covered can be applied to any interactive report in Cognos. Feel free to select a different set of prompts than demonstrated.

Navigate to Reports

In Cognos Analytics, all managed reports are housed in the *Team Content* pane.

Steps:

1. **Report Navigation:** ***Team Content*** > ***Admissions***

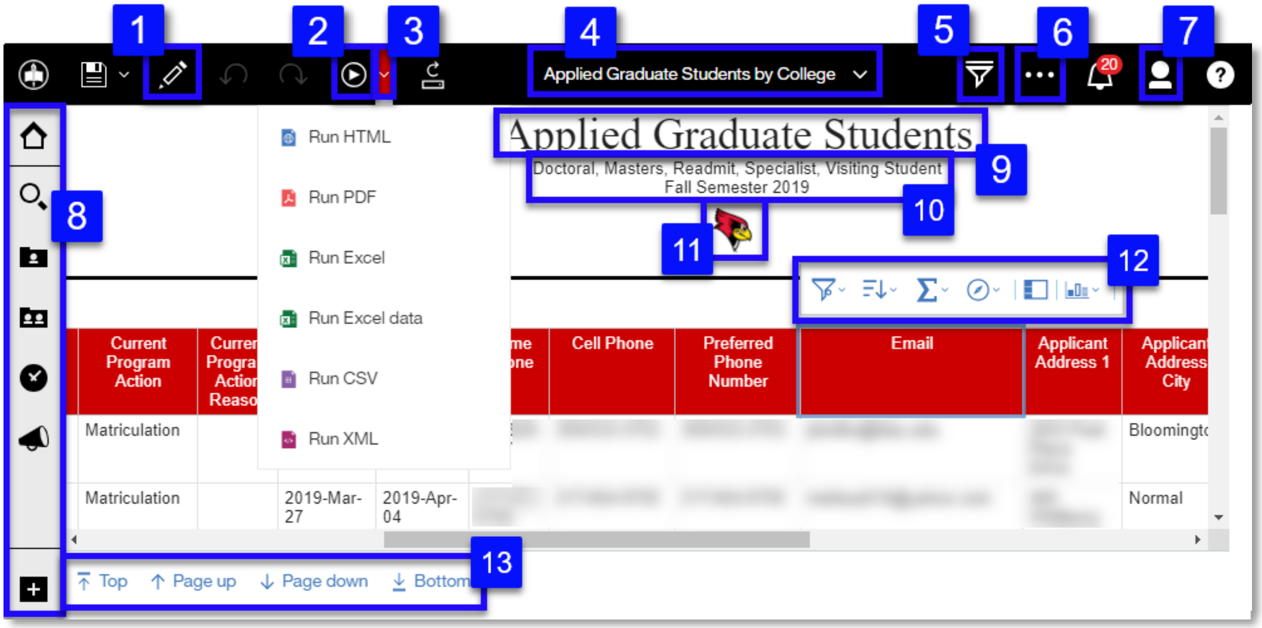
   Within the **Admissions** folder, there are three folders:
   Dashboards – Houses the ***Current Week YTD Admissions Summary*** dashboard which provides application counts and trends for the current week compared to the same week in prior years.
   Packages – Houses all data items in the Admissions Package. This folder is used with creating or editing reports with ad hoc access.
   Reports – Houses all managed reports. Most users spend the majority of their time in this folder.

2. Click the ***Reports*** folder.
3. Select the ***Admitted Undergraduate Students by College*** report.
   Use the More dots next to the report title to edit a report instead of viewing it.

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.*

4. Suggested Prompts:
   a. ***Step #1:*** ***Fall Semester 2019***
   b. ***Step #2:***
      Plans: ***Accounting BS*** and ***Accounting Addl Plan***.
   c. ***Step #3***: ***Select all*** link at the bottom of the box.
5. Click the ***Finish*** button at the bottom of the screen.

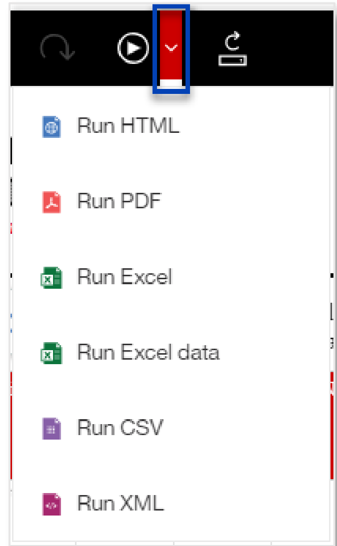
Step #2 Program, Department, and Plans Prompt This prompt will search for **students currently** in the program, department, or plan, which may not be the student's admitted program/department/plan. Make selections from only one of boxes in ***Step #2***, ***Program*** or ***Department*** or ***Plan***.



Overview of Report Viewer

1. ***Edit in authoring*** –Access the report editor and make changes to the report. *This can only be used by users with Ad Hoc access to the given package.*
2. ***Run as*** – Return to the prompt page to make edits to the selected prompts.
3. ***Run as (dropdown arrow)*** – View all format options. Change the format of the report to PDF from HTML or export the report to Microsoft Excel.
4. ***Page Title dropdown*** – The title of the page being viewed will display here. Use the dropdown to navigate through reports that have been viewed during a logged in session.
5. ***Show Filters*** – Filters that have been added to the report using the interactive report features are displayed and can be removed.
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. ***Prompt Selections*** –Prompt selections made on the prompt page display at the top of the report.
11. ***Reggie Icon (Data Cookbook)*** – Pop up box with a description of the report, list of all data items in the report as well as a description of those data items. *This feature will be coming soon, but currently is not available for this package*.
12. ***Interactive Report Toolbar*** – After clicking on a data item header, the toolbar will appear. Use this toolbar to preform simple edits such as filter, sort, summarize and group.
13. ***Top/Page Up/Page Down/Bottom*** **-** These links appear when there are too many results to display on one page. Use these arrows to navigate through the additional 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 run, the report displays the most recent information. If you wish to view the same information later, export and save the report to a local drive.

Run as *Reset Prompts and Run* –Return to the prompt page to make edits to the selected prompts.

Run HTML – Reports in Cognos run in HTML. (*default view*)

Run PDF – A static printable view of the report. Reports with too many data items across do not display well in PDF format.

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

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. User Run Excel data to 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

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.

   *A box with a **Cancel** button will appear. It may take several seconds for your report to display. The document will appear in the bottom, left corner of the window.*
5. Double click on the report's name.

The report will open in Excel.

6. 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 via email and saved in Cognos based on the schedule the user sets up.

1. From the report viewer screen, 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.
   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.
4. Use the ***Time*** field to enter the time the report will be run and sent.
   Most information is updated overnight. For the most up-to-date report, enter a time after 4:00AM.
5. Click the ***arrow*** at the end of the ***Format*** field.
   a. Confirm ***HTML*** is selected.
   b. Select ***Excel***.
   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***
   c. Unselect ***Include a link to the report***.
   d. Confirm ***Save report*** is selected.
   e. Click the ***Done*** button.
7. Click the ***Create*** button.

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 most recent subscription created will be at the bottom of the list.

3. Hover over the subscription you wish to delete. Click the ***More*** dots that will appear to the right of the subscription.
4. Click ***Modify this subscription*** to edit.
   All selections can be edited the same way they were originally selected with the exception that Prompts can now be edited as well.
5. To edit the ***Prompts*** field:
   a. Click the ***arrow*** at the end of the ***Prompts*** field.
   b. Click ***Edit*** in the top right.
   c. Select the prompts of your choice.
   d. Click the ***Finish*** button.
   e. Click the ***Back*** arrow top left of the pane.
   f. Click the ***Update*** button.

Once the Update button has been clicked, the subscriptions has been edited. The ***Modified*** date and time will be updated as well.

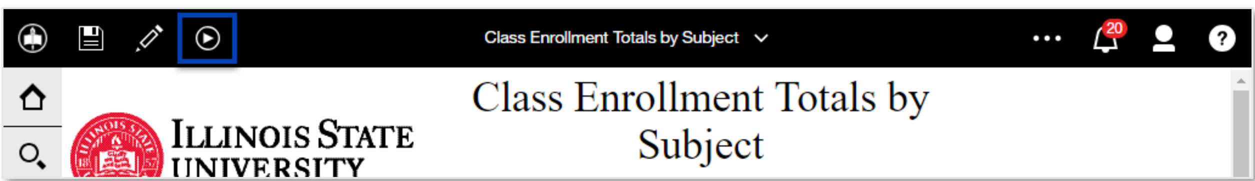
Navigate to Another Report

Navigate to a summary report to see an example of a crosstab and visualization.

Steps:

1. Click the ***Team Content*** icon.
   Cognos will remember the folder path we previously followed to view the Admitted Undergraduate Students by College report. The following folder selection should be represented in the breadcrumbs at the top of the navigation pane.
   Admissions > ***Reports***
2. Click the ***Summary of Admitted Undergraduate Students by College*** report.
3. Suggested Prompts:
   a. ***Select the Term***: ***Fall 2019***
   b. ***Select Program or Programs***: ***College of Business*** and ***College of Education***.
   c. ***Select Student Types***: ***First Time in College*** and ***Transfer***.
4. Once you have selected your prompts, click the ***Finish*** button at the bottom of the screen.

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 standard 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.

If in Google Chrome: 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 will be at the bottom of the pop up window. *****You may have to resize the pop up window to see the file.***

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

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

C. Edit a Report

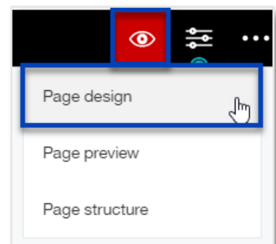
Follow along as the trainer demonstrates and explains the process of editing a managed report in Cognos.

Navigate to Report Editor through Report Viewer

The report editor can be accessed when navigating to the report using the ***More*** dots or it can be accessed through the report viewer. These instructions cover how to access the editor through the report viewer.

Steps:

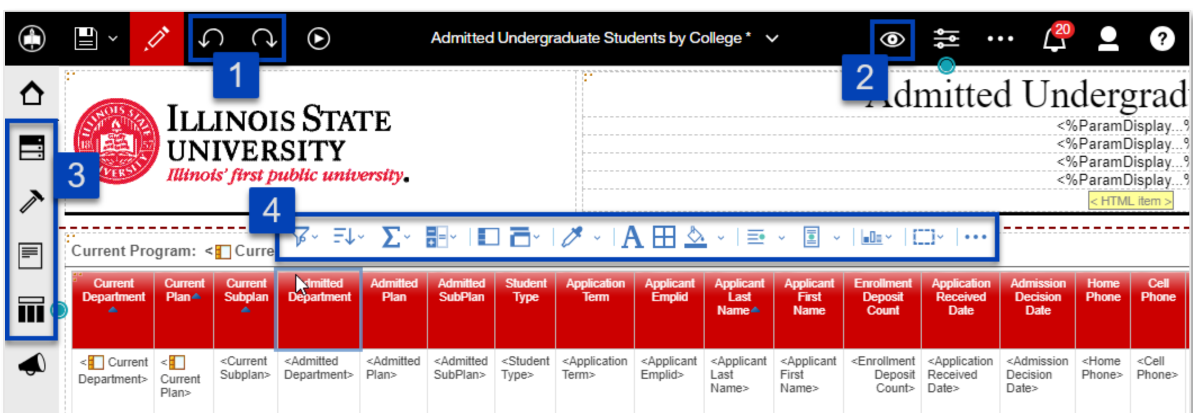
1. **Report Navigation**: ***Team Content*** > ***Admissions*** > ***Reports*** > ***Admitted Undergraduate Students by College***
2. Click the ***Edit in authoring*** icon.
3. When the ***IBM Cognos Analytics – Reporting*** pop up window saying ***The package has been updated. The report was updated based on the updated package.*** appears, click the ***OK*** button.



**The report editor may open showing prompt selections. If this happens:

1. Click ***Page Views***.
2. Click ***Page Design***.

Overview of Report Editor



1. ***Undo and Redo*** – Use the undo and redo buttons as you edit the report.
2. ***Page Views*** – Used to preview the report with data. The default view in the report editor does not fill in data so that editing can be done faster.
3. ***Data Pane***:
   - ***Data*** – Contains data items and filters. Expand the folders then either drag and drop into the report, or double click the item.
   - ***Toolbox*** – Contains numerous items that users can add to reports, such as page numbers, additional titles, and images.
   - ***Pages*** – Used to view or create new report pages and prompt pages. (*Most users will not use this pane.*)
   - ***Queries*** – Used to create or adjust queries in reports and to complete complex tasks, such as writing SQL statements. (*Most users will not use this pane.*)
4. ***Tool Bar*** – Used for editing columns such as sorting, summarizing, and grouping. It will only appear after you click a column header. *The picture above shows* ***Current Department*** *after being clicked.*

IMPORTANT – Set Report Options

For every report you edit or create, you must set your default option for Summarization.

Steps:

1. Click the ***More*** icon in the upper right corner.
2. Click ***Options***.
3. In the ***Options*** window, click the ***Report*** tab.
4. Uncheck ***Automatic group and summary behavior for lists***.
5. Click the ***OK*** button.

Delete Data Item

Steps:

To delete one data item:

1. Click the ***Cell Phone*** header.
2. Press the **Delete** button on keyboard.

To delete multiple data items:

3. Hold down the **Ctrl** key while selecting the following:
    - ***Enrollment Deposit Count***
    - ***Home Phone***
    - ***Preferred Phone Number***
4. Click the ***More*** dots ••• on the right side of the tool bar.
5. Click ***Delete*** at the bottom of the list that appears.

To undo the deletes, use the Undo button in the top left of the toolbar.

Move Data Item

Move data columns within a report.

Steps:

1. Drag and drop ***High School GPA Ranges*** in front of ***Application Received Date***.
   The blinking gray line is where the columns will be dropped when you release them.
2. Click the ***ACT Composite Score Ranges*** column header.
3. Hold down the **Ctrl** key while clicking ***ACT Comp Score Averages***.
4. Drag and drop them between ***High School GPA Ranges*** and ***Application Received Date***.

Add Data Item

Add additional data items into the report from the Data pane.

Steps:

1. Click the ***Data*** pane.
2. Click the arrow in front of ***Admissions*** to expand.
3. Click the arrow in front of ***Admission Fact*** to expand.
4. Click the arrow in front of ***ACT*** to expand.

Add multiple data items using drag and drop:

5. Hold down **Ctrl** while clicking on:
    - ***ACT English Score***
    - ***ACT Read Score***
    - ***ACT Math Score***
    - ***ACT Science Score***
6. Drop the data items anywhere in the report.

> When working with data items in the Admissions Package, pay special attention to whether it is ***Current***, ***Applied***, or ***Admitted***.

Add individual data items using double clicking:

7. Double click on the data item

Create Custom Filter

Filters and prompts come in each package just like data items. Users can also create custom filters based on the data items that are in the report.

Steps:

1. Click the ***Admitted Plan*** column header.
   The data item that you wish to filter on must be present in the report.
2. Click the ***Filter*** icon on the toolbar that appears.
3. Click ***Create Custom Filter...***
4. Using the ***Find*** box, click the ***Plus*** icon directly to the right of ***Accountancy Additional Plan***, ***Accountancy BS***, and ***Accounting Addl Plan***.
5. Click the ***OK*** button.

Remove Filter or Prompt

Filters and prompts can be removed from a report at any time in the editing process.

Steps:

1. Click any data item column header to get the toolbar to appear.
2. Click the ***Filter*** icon on the toolbar that appears.
3. Click ***Edit Filters….***.
4. All filters and prompts that have been added to the report are displayed in the box. Select ***[Current Program] in (?P_Prog?)***.
5. Hold down the ***Ctrl*** key while clicking ***[Current Plan] in (?P_Plan?)*** and ***[Current Department] in (?p_dept?)***.
6. Click the ***Delete*** icon.
7. Click the ***OK*** button.

Change Report View (Preview with Data)

At any point the report view can be changes so the data is populated in the report.

Steps:

1. Click the ***Page views*** icon at the top right of the screen.
2. Click on ***Page preview***.
   *The current view is **Page design**.*
3. Select the answers to fill in the prompts.
4. Click the ***OK*** button.

Sort Data Items

Data items can be sorted ascending or descending. .

Steps:

1. Click the column header ***Applicant Emplid*.**
2. On the toolbar, click ***Sort***.
3. Click ***Ascending***.

Save Report in My Content

In order to access the report with the edits at a later time, it needs to be saved to My Content.

When saving edited reports, the report query is being saved. The data that is displayed when viewing the report will be updated when the rest of the package is updated.

Steps:

1. Click the arrow next to ***Save*** .
2. Click ***Save as***.
3. In ***Save as*** window, click ***My content*** in the left pane.
4. Use the ***Save as*** field to give the report a meaningful name.
5. Click the ***Save*** button.

Run the Report

After the report has been edited and saved, run it in HTML format. This is the format that you will usually view the report.

Steps:

1. Click the ***Run*** icon .
2. Click ***Run HTML***.
   If the report does not come up, you may need to turn off your pop up blocker.
3. Select from the prompt page.
   Notice the Program and Plan prompts are still on the prompt screen. We did not edit the prompt screen so these prompts will still be present. However, they are no longer required prompts so you can ignore that they are there.

The report will display with the changes you made.

Close Open Reports and Return to Welcome Page

Return to the home page.

Steps:

1. Close the additional tab that opened when running the report from the editor.
2. In the middle of the top toolbar, click the arrow by the title of the report.
3. Click the icon to the right of each report that appears in the dropdown.

You will return to the Welcome Page.

Note: If you wish to leave the reports open and just return to the Welcome Page, click the ***Home*** *icon in the dropdown* ***or*** *in the navigation pane.*

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D. View Reports in My Content

Run One of Your Saved Reports

Use the ***My Content*** folder to view and edit reports you have created and edited.

Steps:

1. Click the ***My Content*** icon.
2. All the reports that you have edited and created today will appear in a list on the pane. Click on one of your reports.
3. Select the prompts of your choice.
4. Notice that if you wish to edit a report further, you can click the ***Edit in authoring*** icon.

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Independent Practice

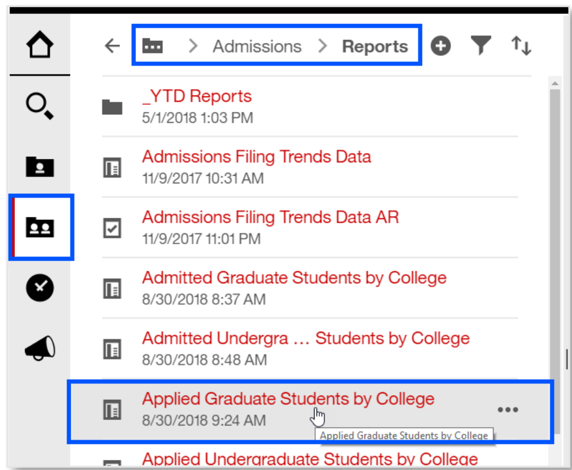
Complete activities 1 and 2. Feel free to take a break during this time.

1. View a Report

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 Reports

Open the ***Applied Graduate Students by College*** report in the ***Admissions*** package.



Steps:

1. Click ***Team Content***
2. Click ***Admissions***.
3. Click ***Reports***.
4. Click ***Applied Graduate Students by College***.
5. Suggested Prompts:
   a. ***Step #1:*** ***Fall Semester 2017***
   b. ***Step #2***
      i. ***Plans***: ***Communication MA***
      ii. Hold down **Ctrl** and select ***Communication MS***
   c. ***Step #3***: ***Select all*** link at the bottom of the box.
6. Once you have selected your prompts, click the ***Finish*** button at the bottom of the screen.

1b. Change Selected Prompts

View the report with all the students that applied to the ***Communication Sciences and Disorders Department***.

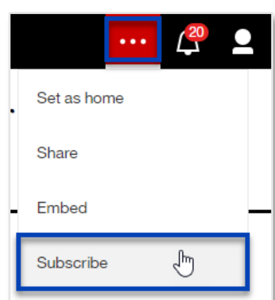
Steps:

1. Click the ***Run*** icon in the upper left corner.
2. Use the Prompt Screen to reset your choice of prompts.
   a. Under the ***Plan(s)*** box, click the ***Deselect all*** link.
   b. Use the ***Department(s)*** box to select ***Communication Sciences and Disorders***.

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

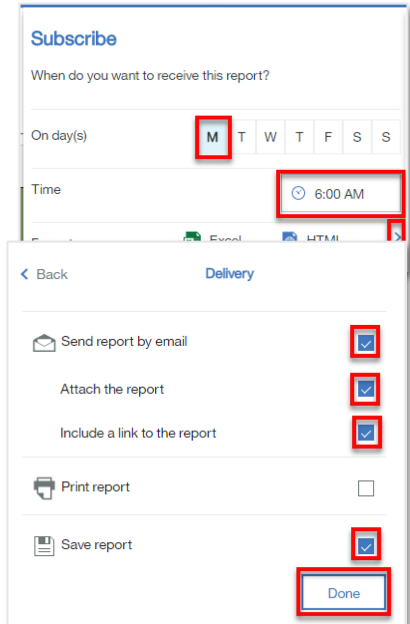
1c. Subscribe to a Report

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***.

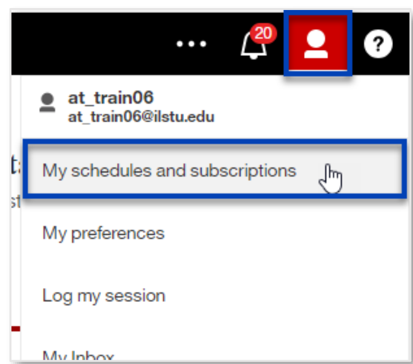


3. Use the ***On day(s)*** field to click ***Monday (M)***.
   Make sure all other days are unselected.
4. Use the ***Time*** field to enter "`6:00AM`."
5. Click the ***Format*** field arrow.
   a. Confirm ***HTML*** is selected and select ***Excel***.
   b. Click the ***Done*** button.
6. Click the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

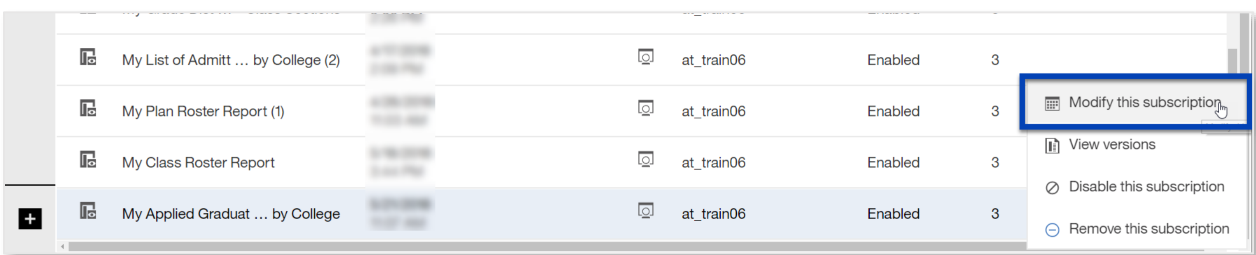
1d. Manage Subscriptions

Once a user has subscribed to a report, the subscriptions can be edited or deleted. Edit the subscription you just added to also be sent to you on Wednesdays and change the report prompts.

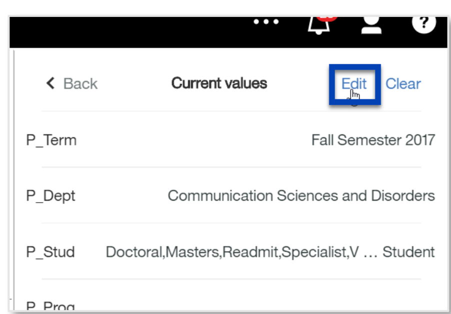
Steps:



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

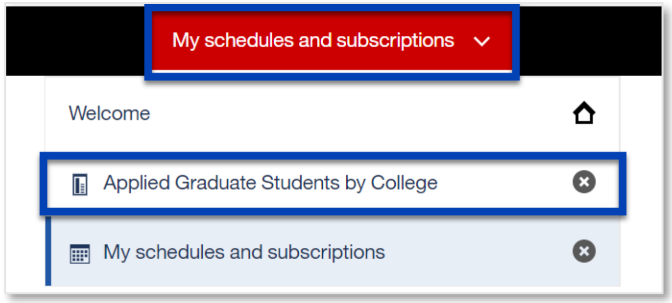


5. Select ***Wednesday (W)***.
6. To edit the ***Prompts*** field:
   a. Click the ***arrow*** at the end of the ***Prompts*** field.
   b. Click ***Edit*** in the top right.
   c. Select the prompts of your choice.
   d. Click the ***Finish*** button.
   e. Click the ***Back*** arrow top left of the pane.
   f. Click the ***Update*** button.



Return to viewing the report by:

1. Clicking ***My subscriptions*** in the middle of the top toolbar.
2. Click the report ***Applied Graduate Students by College***.



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2. Edit a Report

The following instructions will walk you through the **Edit a Report** independent activity. Follow the detailed steps or if you would like to test yourself, complete the task in the first line before reading the step by step instructions. STOP working at the end of this activity.

2a. Navigate to Report Editor through Report Viewer

While viewing the report ***Applied Graduate Students by College***, access the report editor so you can begin editing.

Steps:

1. Click the ***Edit in authoring*** icon.

2b. Switch Report Views

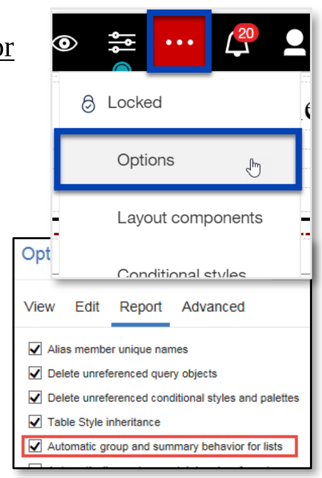
The report editor may open in the ***Preview View***. Switch the ***Page View*** to ***Page Design***.

Steps:

1. Click ***Page Views***.
2. Click ***Page Design***.

2c. IMPORTANT – Set Report Options

For every report you edit or create, you must set your default option for Summarization.



Steps:

1. Click the ***More*** icon in the upper right corner.
2. Click ***Options***.
3. In the ***Options*** window, click the ***Report*** tab.
4. Uncheck ***Automatic group and summary behavior for lists***.
5. Click the ***OK*** button.

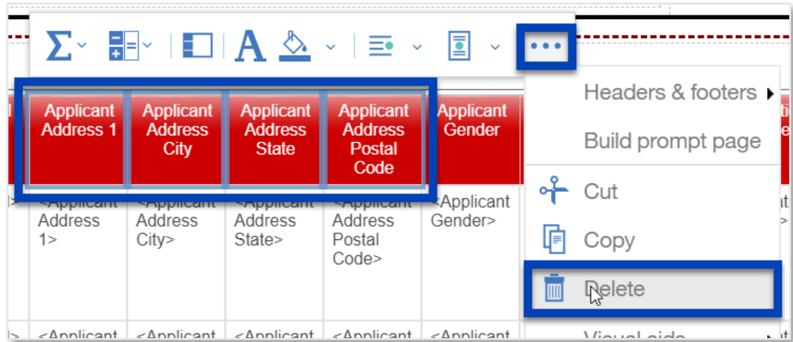
2d. Delete Data Items

Delete the data items ***Student Type***, ***Applicant Address 1, Applicant Address City, Applicant Address State***, and ***Applicant Address Postal Code*** from the report.

Steps:

1. Click the ***Student Type*** header.
2. Press the **Delete** button on keyboard.

Delete ***multiple data items*** using the option on the toolbar:



1. Hold down the **Ctrl** key while clicking on:
   - ***Applicant Address 1***
   - ***Applicant Address City***
   - ***Applicant Address State***
   - ***Applicant Address Postal Code***
2. Click the ***More*** dots **•••** on the right side of the tool bar.
3. Click ***Delete*** at the bottom of the list that appears.

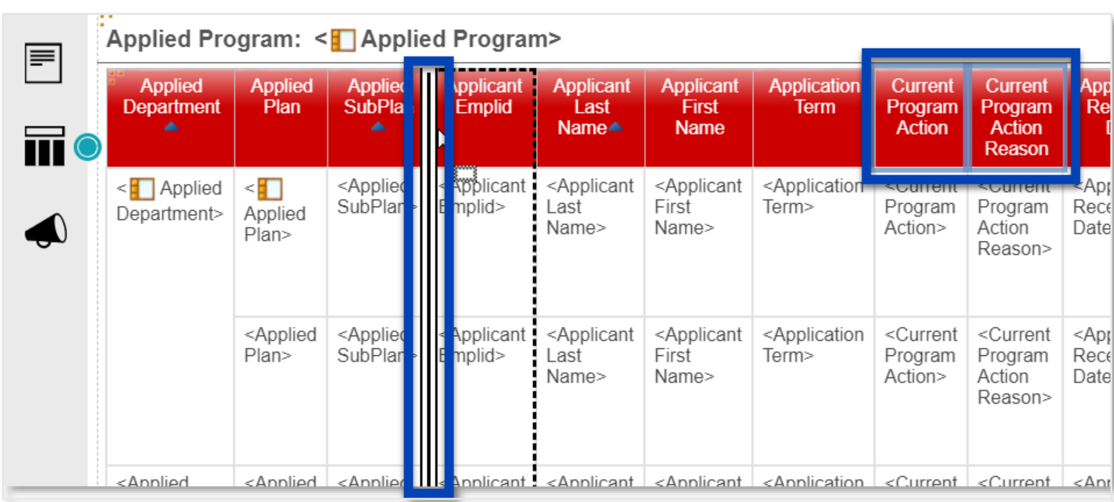
2e. Move Data Item

Move columns so they appear in the following order:

Applied Department
Applied Plan
Applied SubPlan
Current Program Action
Current Program Action Reason
Applicant Emplid
Applicant Last Name
Applicant First Name
Application Term

Steps:

1. Drag and drop ***Application Term*** after ***Applicant First Name***.
   The blinking gray line is where the columns will be dropped when you release them.
2. Hold down the **Ctrl** key while clicking on:
   - ***Current Program Action***
   - ***Current Program Action Reason***
3. Drag and drop the data items between ***Applied SubPlan*** and ***Applicant Emplid***.



2f. Add Data Item

Add data items ***Applicant Age***, and ***Military Status*** or any other data items you think might be helpful to the report.

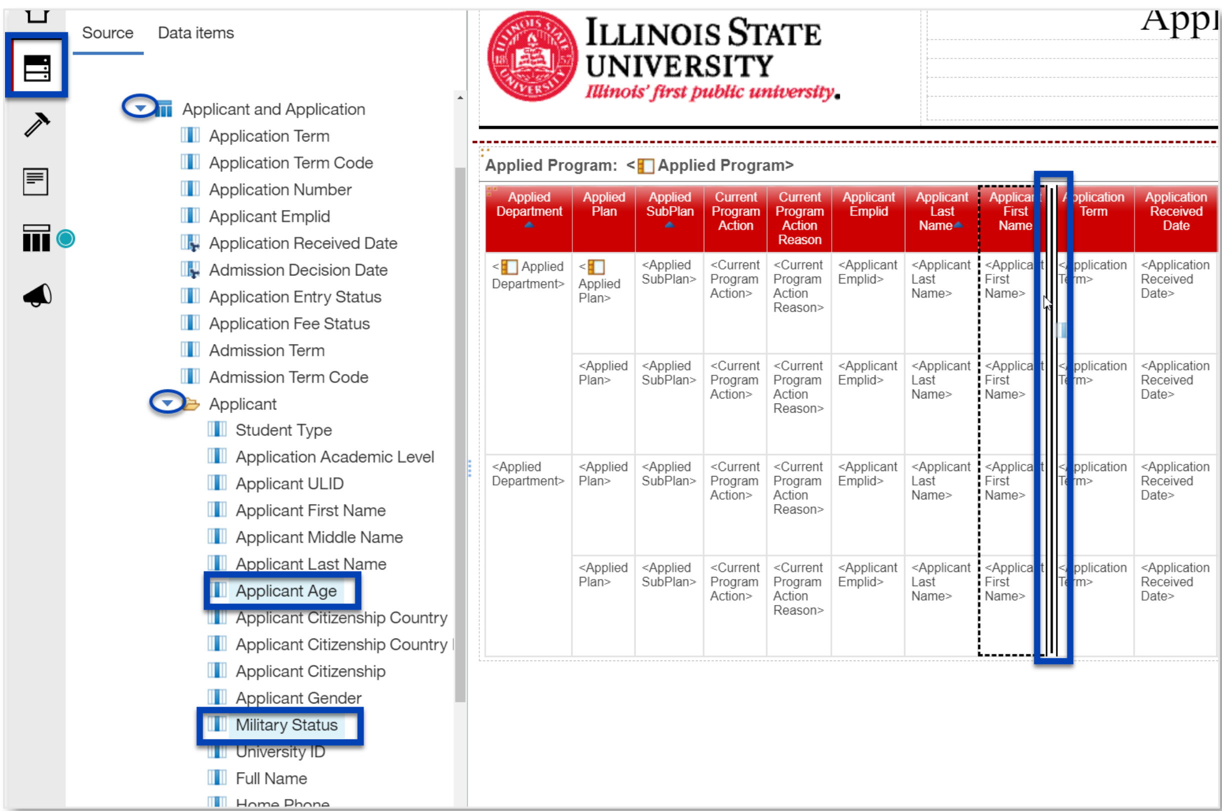
Steps:

1. Click the ***Data*** pane.
2. Click the arrow in front of ***Admissions*** to expand.
3. Click the arrow in front of ***Applicant and Application*** to expand.
4. Click the arrow in front of ***Applicant*** to expand.

Add multiple data items using drag and drop:

5. Hold down the **Ctrl** key while clicking on:
    - ***Applicant Age***
    - ***Military Status***
6. Drag and drop them after ***Applicant First Name***.

    The blinking gray line is where the columns will be dropped when you release them.



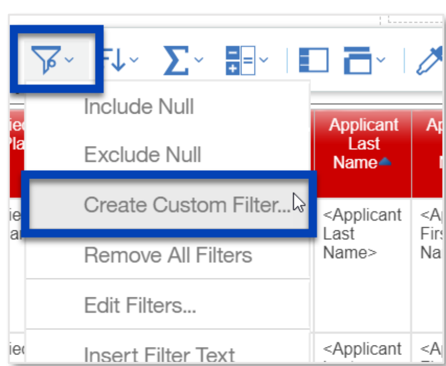
2g. Create Custom Filter

Create a custom filter for students with the ***Current Program Action*** as ***Application***.

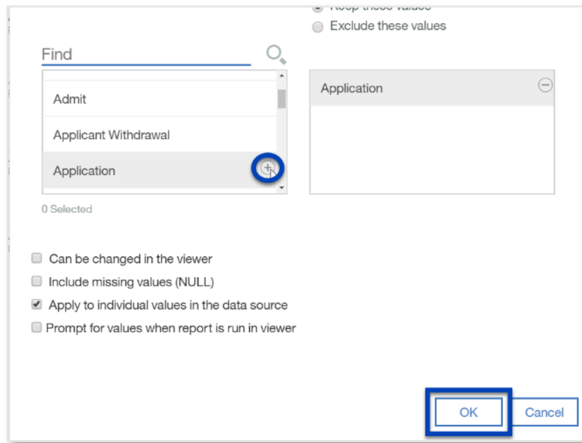
1. Click the ***Current Program Action*** column header.

    The data item that you wish to filter on must be present in the report.

2. Click the ***Filter*** icon on the toolbar.
3. Click ***Create Custom Filter...***



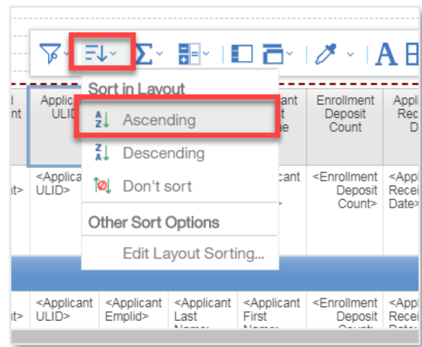
4. Using the ***Find*** box, click the ***[Plus](#)*** icon directly to the right of ***Application***.
5. Click the ***[OK](#)*** button.



2h. Sort Data Items

Sort students by ***Applicant Emplid***.

1. Click on the column header ***[Applicant Emplid](#)***.
2. Click the ***[Sort](#)*** icon.
3. Click ***[Ascending](#)***.

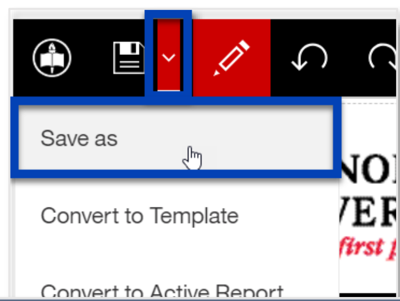


2i. Save Report in My Content

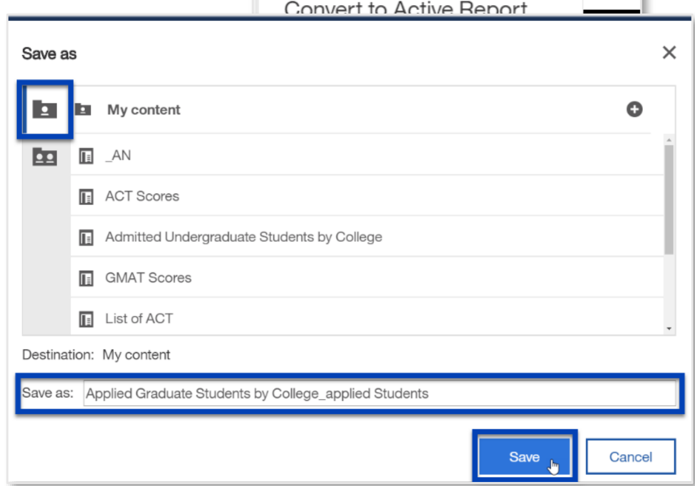
In order to access the report with the edits at a later time, it needs to be saved to ***My Content***.

Steps:

1. Click the arrow next to ***[Save](#)***.
2. Click ***[Save as](#)***.

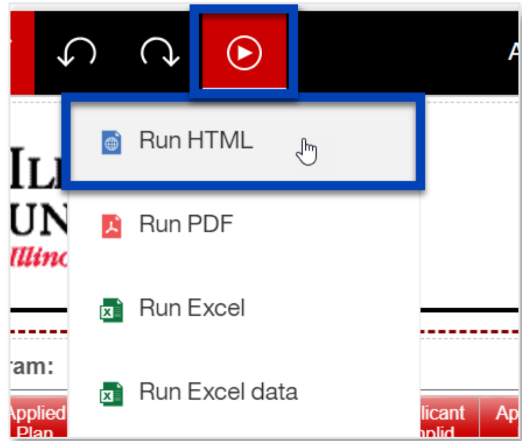


3. In ***Save as*** window, click ***[My content](#)*** in the left pane.
4. Use the ***Save as*** field to give the report a meaningful name.
5. Click the ***[Save](#)*** button.



2j. Run Report

After editing and saving the report, run it in HTML format. Use your choice of prompts.



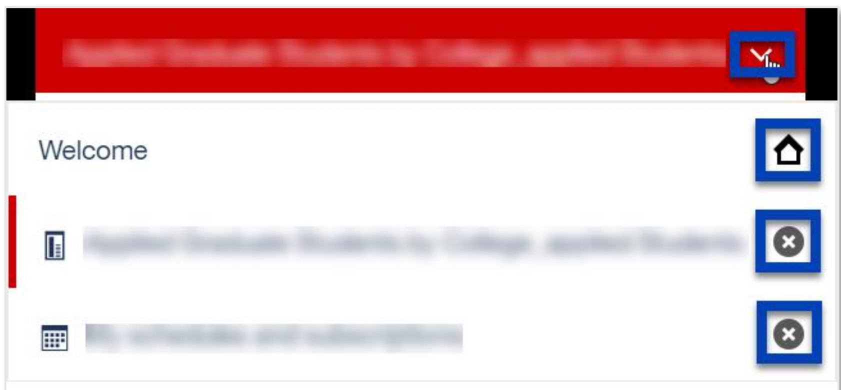
Steps:

1. Click the ***Run*** icon .
2. Click ***Run HTML***. An additional tab will open with the prompt page for your report. If nothing happens, check your pop up blocker and then try again.
3. Select from the prompt page.
   You can choose any prompts you would like.

The report will display with the changes you made.

2k. Close Open Reports and Return to Welcome Page

Return to the home page.



1. Click the dropdown arrow next to the report name.
2. Click the icon to the right of each report that appears in the dropdown.

You will return to the Welcome Page.
*Note: If you wish to leave the reports open and just return to the Welcome Page, click the **Home** icon in the dropdown **or** in the navigation pane.*

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3. View Reports in My Content

3a. Open a Report you Edited

Use the My Content folder to view and edit reports you have created and edited.

Steps:

1. Click the ***My Content*** icon.
2. All the reports that you have edited and created will appear in a list on the pane. Click on the ***List of Admitted Students by College*** report you edited.
3. Select the prompts of your choice.
4. Notice that if you wish to edit is report further, you can click the ***Edit in authoring*** icon.

3b. Return to Welcome Page

Return to the home page.

1. Click the dropdown arrow next to the report name.
2. Click the ***Home*** icon.

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Guided Instruction

Admissions Dashboard (*Current Week YTD Admissions Summary*)

The Admissions Dashboard is an interactive dashboard that displays summaries of received applications, admitted students, and students that have put down a deposit by college, department, plan or subplan. Users can use the dashboard to drill down into detailed reports that make up these summaries.

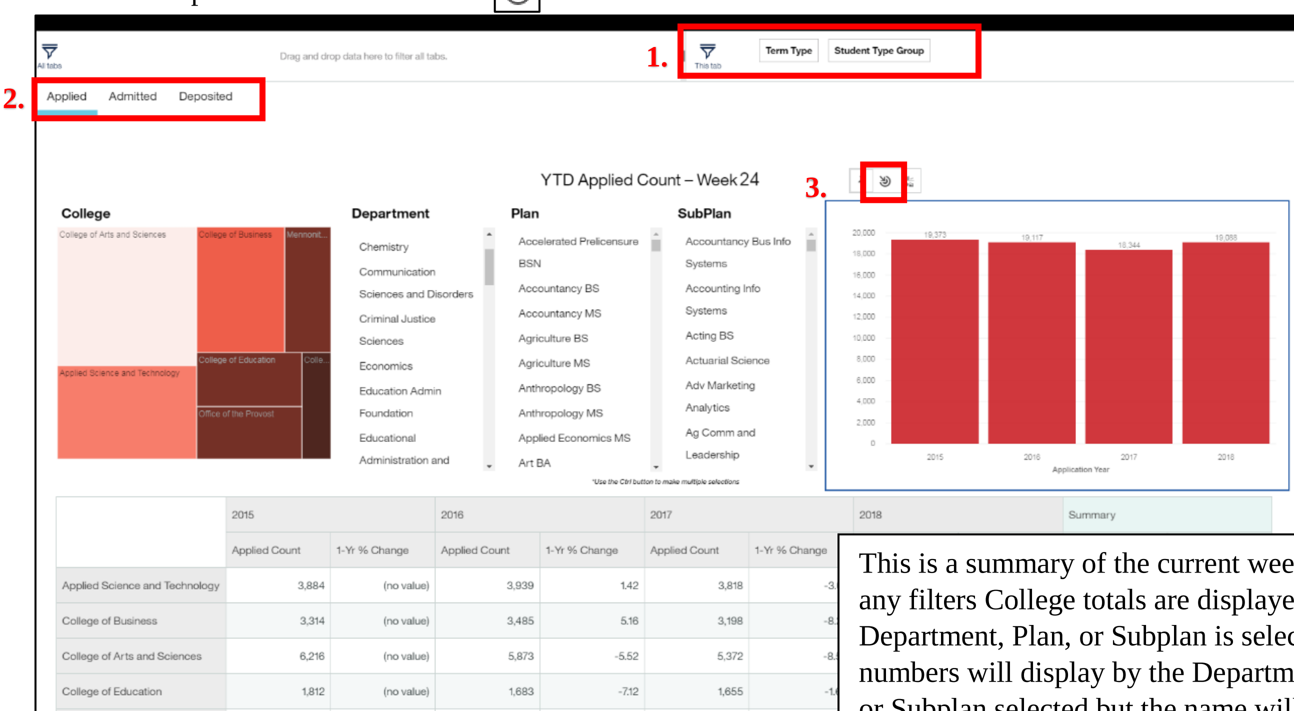
Opening the Admissions Dashboard

The Admissions Dashboard can be located using the following folder path ***Team Content*** > ***Admissions*** > ***Dashboard*** > ***Current Week YTD Admissions Summary***. This means you may need to use the breadcrumbs at the top of the navigation pane to navigate back a few folders.

Using the Admissions Dashboard

The Admissions Dashboard was created to be responsive to the selections you make. The following diagram outlines those interactive features.

1. **Filter** – There are two ways to filter within the dashboard and both can be used simultaneously. The filter symbol will appear to indicate that the filter selection has been applied to the widgets. Click on the symbol to see what the filter includes or to delete a filter.
   a. *Filter Tab* – Click on the desired field to make filter selections. Then click ***OK*** to see filtered results on the dashboard. Use ***Clear all*** to delete selections made on the filter tab.
   b. *Workspace* – Click individual data points within the widgets (College, Department, Plan, SubPlan, and Application Year).
2. **Tabs** – This dashboard has multiple tabs, with a blue line indicating which tab the user is observing. Clicking on any of the three tabs will take the user to that tab to display the associated information.
3. **Drill Through** – Clicking along the sides of the treemap, bar chart, or crosstab will prompt a button bar with additional features such as a drill through. When the user clicks this button a list will pop up with reports the user can access.

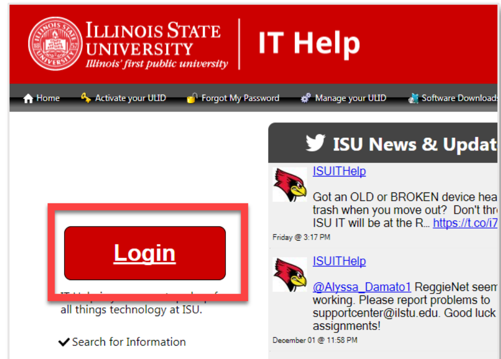


This is a summary of the current week. Without any filters College totals are displayed. When a Department, Plan, or Subplan is selected the numbers will display by the Department, Plan, or Subplan selected but the name will still display the corresponding College.

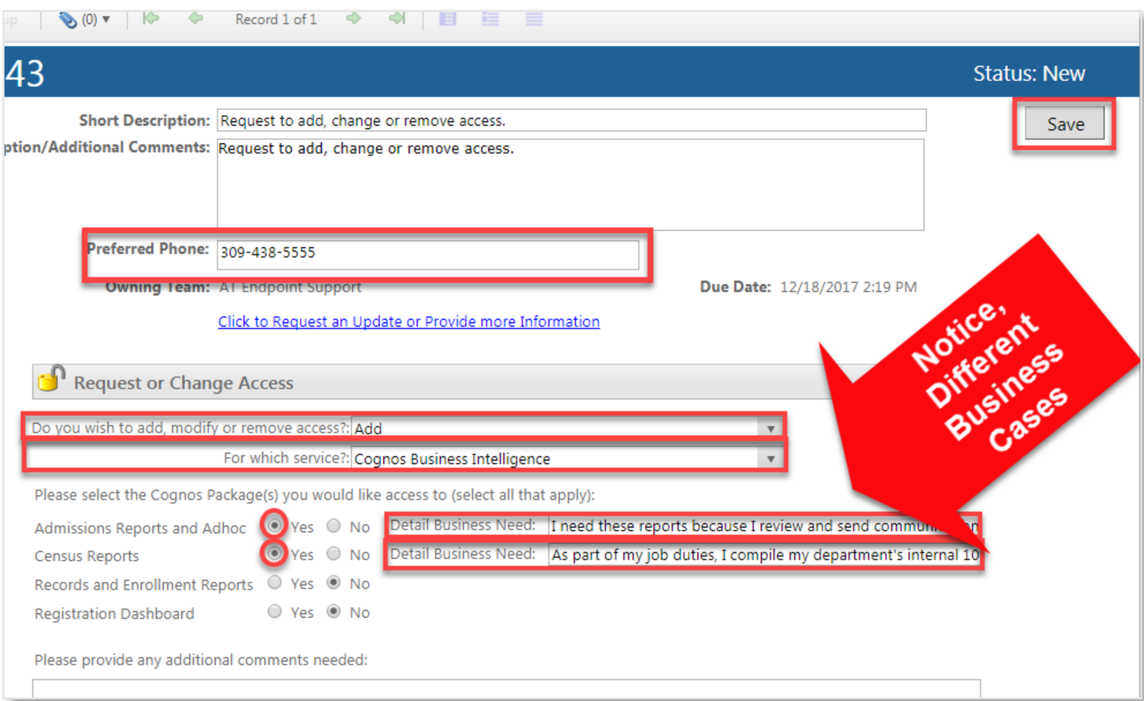
Request Access to Cognos

Attending this class does not grant you access to Cognos. You must request access to each package you need with a separate business case for each package.

Steps:



1. Navigate to ITHelp.IllinoisState.edu.
   If you are in the Training Lab a link to the website is on your desktop.
2. Click the ***Login*** button.
3. In the pop up box, enter your ULID and password. Then click the ***Sign-in with your ULID*** button.
4. Click the ***Make a Request*** button.
5. Click the ***Applications*** link in the top left corner.
6. Click the ***Request or Change Access*** link in the top, left corner.
7. Use the ***Preferred Phone Number*** field to enter a phone number you can be reached at.
8. Use the ***Do you wish to add, modify or remove access?*** dropdown menu to select ***Add***.
9. Use the ***For which service?*** dropdown menu to select ***Cognos Business Intelligence***.
10. Click the ***Yes*** radio button next to each package you wish access.
    **Users must also attend the Records and Enrollment training before they can request access to the Records and Enrollment Package.*
11. For each package, use the ***Detail Business Need*** to list a separate business need.
12. Click the ***Save*** button.



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Where to Get Help

Request Access to Cognos

This class does **not** automatically give a user access to Cognos. Request access through the Technology Support Center (TSC) by phone at 438-HELP (4357), email at supportcenter@ilstu.edu, or through the web portal ITHelp.IllinoisState.edu.

When you request access you will need to include the following information:

- ULID
- Department
- Business Need
- What you need access to:
    - Admissions (includes reports and ad hoc)
    - Census Reports
    - Records and Enrollment Reports*
    - Records and Enrollment Ad Hoc**
    - Student Registration

  *Users must also attend the Records and Enrollment training before they can request access to the Records and Enrollment Package.

  **Users must have access to the Records and Enrollment Package for 2 weeks before requesting ad hoc access. When you do request this access, include the business need why the delivered reports do not meet your needs.

Contact the Technology Support Center (TSC)

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

Attend an Open Lab session

- One-on-one assistance
- Creating/modifying reports
- General Cognos assistance
- Sign up at https://appointments.illinoisstate.edu/amonline/default.aspx?AG=876

Visit Website for:

- Information about packages/reports
- Changes and upcoming releases
- Additional training resources
  URL: http://data.illinoisstate.edu/

You Try!

Go to https://insight.illinoisstate.edu/ and log in using your ULID and password.

Questions?

Visit data.IllinoisState.edu/training/

or

Contact eda@ilstu.edu