IBM Cognos Analytics

Create a List

The following instructions cover how to create a list report in IBM Cognos Analytics. A list is a report type in Cognos that displays a series of data columns listing information. Many times list reports are used to display several pieces of information about individual students.

Navigate to Cognos

Cognos Analytics supports all browsers with the exception of Microsoft Edge.

Log into Cognos by going to https://insight.illinoisstate.edu/. (You must use a computer that is connected to the ISU network.) Log in using your ULID and central login password.

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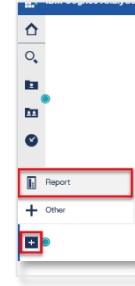
Access the Editing Tool to Create a New Report

To create a new report, click the new button at the bottom of the navigation pane.

1. Click the *New* ➕ icon in the bottom left corner.
2. Click *Report*.
3. Confirm the **Blank** template is selected.
4. Click the *OK* button.

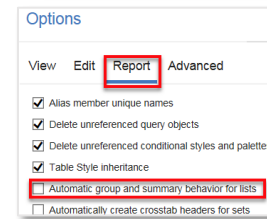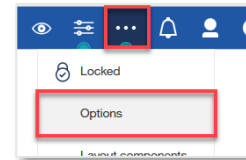## !Must be done before editing or creating any report!
Set Report Options

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

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.

Select a Report Type

The report type needs to be selected before the report can be created.

1. Click the *Plus* ⊕ icon in the center of the screen.
2. Click the *List* ▤ icon.
3. Click the *OK* button in the pop up window.
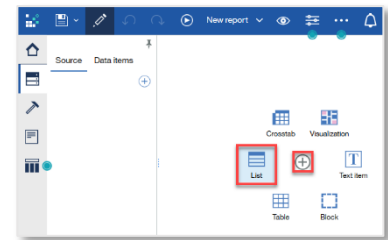
Select Data Source

The folder the data is located in has to be selected for the data items to be added to the report.

1. Click the *Add report data* ⊕ icon in the *Source* tab of the *Data* pane.
2. The *Open file* window will appear. Confirm *Team content* 🖴 is selected in the left pane.
3. Select the package you wish to work within.
4. Click the *Packages* folder.
5. Continue to navigate to the folder where the data is stored.
6. Click the *Open* button.
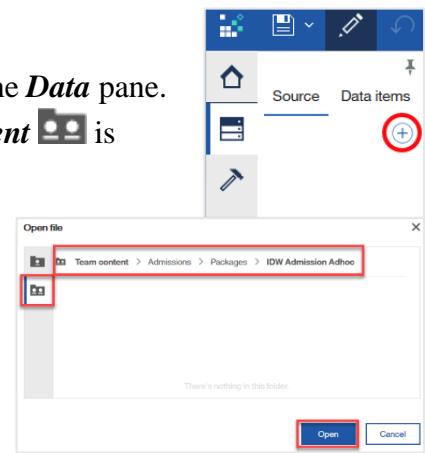
The folders for the data items will appear in the *Source* tab.

Add Data Items

The data items in the report must be added from the *Source* tab of the *Data* pane.

1. Click the arrow in front of the select data source to expand.
2. Continue to click the arrows in front of the desired folders until the data item you wish to add is exposed.
3. Add the data item by double clicking:
    i.   Double click on the data item that is to be added.
        Each data item will appear at the end of the report.
4. Add the data item using drag and drop:
    i.   Click on the desired data item.
    ii.   Drag the data item by holding down the left mouse button while moving the mouse over the report until a line is blinking where the data item will appear.
    iii. Drop the data item in place by releasing the left mouse button.
5. Select more than one data item to add at once:
    i.   Hold down the **Control** key while clicking on each data item.
    ii.   Drag the data items by holding down the left mouse button while moving the mouse over the report until a line is blinking where the data item will appear.
    iii. Drop the data item in place by releasing the left mouse button.
        *Data items will appear in the order they are listed in the **Source** tab.*
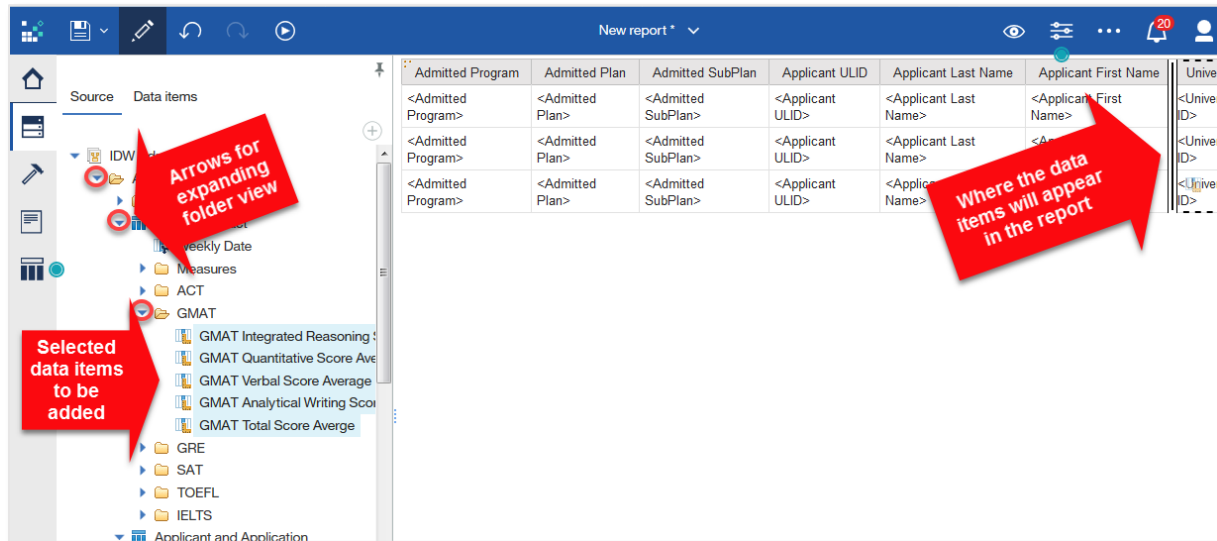

Continue adding data items until all information that should appear in the report is added.
Data items can continue to be deleted and added at any point in the editing process.

## Delete Data Items

Data items can be deleted from the report.

1. Delete a data item using the keyboard:
   i. Click the column header of the data item to be deleted.
   ii. Hit the **Delete** button on the keyboard.
2. Delete a data item using the tool bar:
   i. Click the column header of the data item to be deleted.
   ii. Click the *More* dots ••• on the right side of the tool bar.
   iii. Click *Delete* at the bottom of the list that appears.
3. Delete several items at the same time:
   i. Click the column header of one of the data items to be deleted.
   ii. Hold down the **Control** key while clicking on the other column headers.
   iii. Use steps 1 or 2 above to complete the delete action.
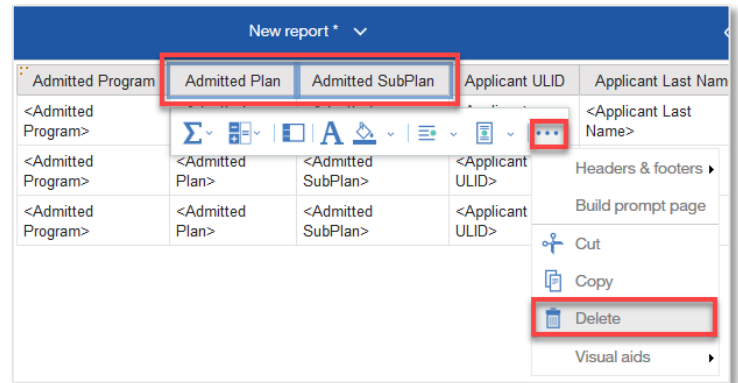
Change a Data Item's Label

The text of the column header for a data item can be changed.

1. Click on the column header of the data item that is to be changed.
2. Click the *More* dots ••• at the end of the tool bar that appears.
3. Click *Edit Data Item Label…*

4. Use the *Data item label* field to type in the desired name.
   *Do not change the text in the **Data item name** field.*
5. Click the *OK* button.
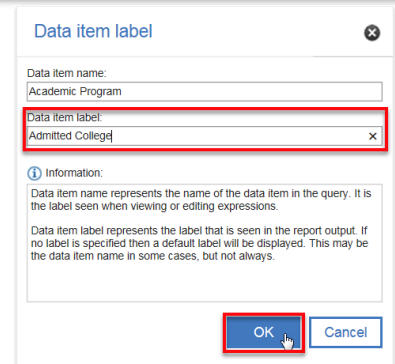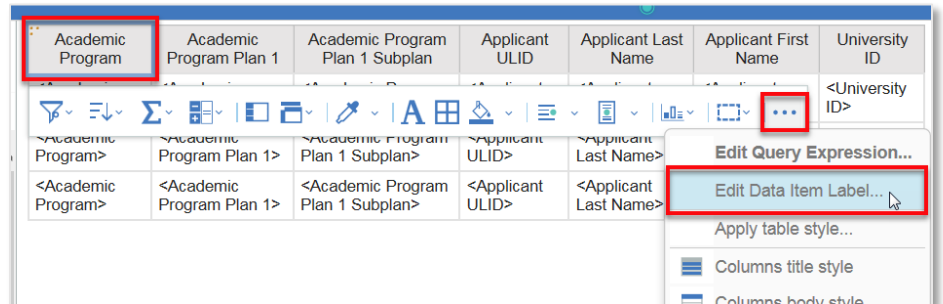
Move Column Order

The order data items appear in the report is based on how they were added, but they can be rearranged at any time in the editing process.
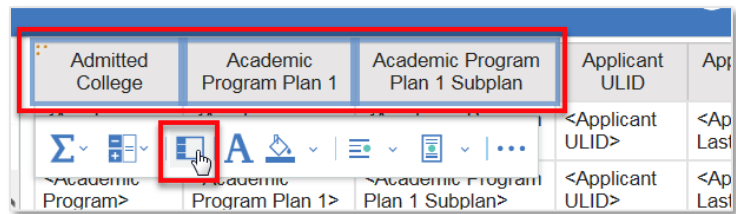
1. Click on the column header of the data item that needs to be moved.
   *If moving more than one data item, hold down the **Control** key while clicking on the column headers of the additional data items.*
2. Drag by holding down the left mouse button while moving the mouse over the report until a line is blinking where the data item will appear.
3. Drop the data item in place by releasing the left mouse button.

Group Data Items

Data items can be grouped so that all like values within that data item will appear together in the report.

1. Click on the column header of the data item that is being grouped.
   *If grouping more than one data item, hold down the **Control** key while clicking on the column headers of the additional data items.*
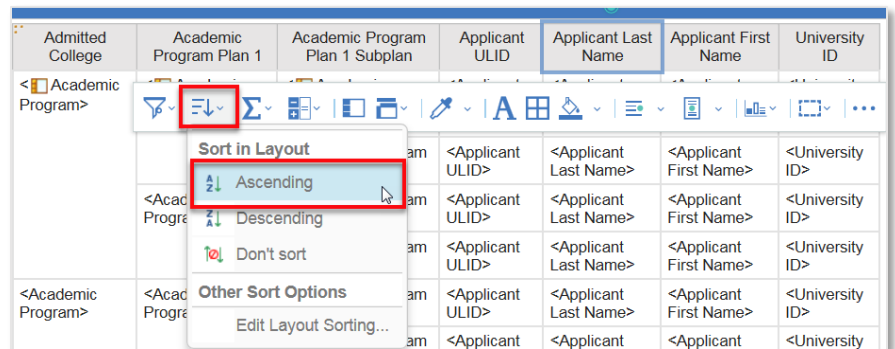2. Click the *Group* icon 🔲 on the tool bar.

Sort Data Items

Information can be sorted so that it appears in alphabetical order or numerical order based on a single data item.

If data items have been grouped, information will be sorted within each grouping.

1. Click on the column header of the data item to be sorted.
2. Click the *Sort* icon ≡↓.
3. Select from the sort options.

Summarize a Data Item

Numerical data items can be summarized in several ways including averaged, counted, and totaled.

If data items have been grouped, a summary will automatically be calculated for each grouped value. If there are no grouped data items, the summary will simply appear at the end of the report.

1. Click the column header of the data item that is to be summarized.
    *If summarizing more than one data item, hold down the **Control** key while clicking on the column header(s) of the additional data item(s).*
2. Click the *Summarize* icon $\Sigma^\vee$.
3. Select from the summarize options.
    Total – the sum of all values added together.
    Count – the number of rows.
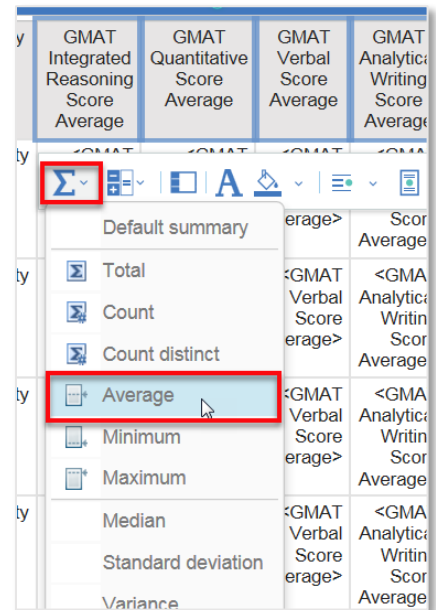
Apply Filters and Prompts

Filters and prompts are applied to data in order to narrow down the information that appears in the report.

- *Filters* are applied and stay the same every time the report is ran.
- *Prompts* are selected before the report is ran each time. The information in the report changes each time based on the prompt selections.

*When creating a report from the **Admissions** package, the **Current Weekly Date Filter** <u>MUST</u> be added.*

1. Under the *Source* tab in the *Data* pane, on the left side of the screen, click the arrow in front of the *Filters and Prompts* folder to expand the folder and see all prompts and filters that are included in the package.
2. Add one filter/prompt at a time:
    i. Double click on the filter that needs to be added.
3. Add several filters/prompts at the same time:
    i. Click on the first filter or prompt to be added.
    ii. Hold down the **Control** key while clicking on each additional filter or prompt.
    iii. Drag and drop selected filters and prompts into the report area.
4. Click the *OK* button in the pop up window that says the filter(s) has/have been added.

Apply a Null Filter

A null filter is added to a data item so that any students that do not have a value reported for that specific data item will not appear in the report.

1. Click the column header of the data item that the null filter is being applied to.

2. Click the *Filter* 🔽 icon on the toolbar.
3. Click *Exclude Null*.
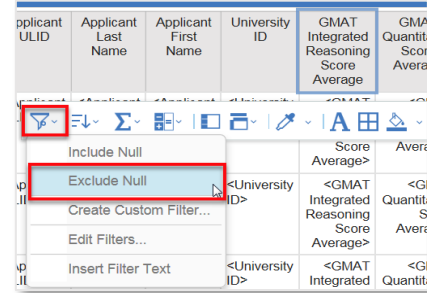
Remove Filter or Prompt

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

1. Click any data item column header to get the toolbar to appear.

2. Click the *Filter* 🔽 icon on the toolbar.
3. Click *Edit Filters…*
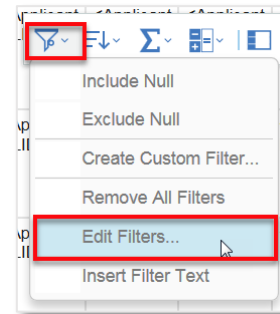
4. All filters and prompts that have been added to the report are displayed in the box. Select the one that is being deleted.

> *If more than one is being deleted, hold down the* **Control** *key while clicking on the additional filters and prompts.*

5. Click the *Delete* icon ❌.
6. Click the *OK* button.
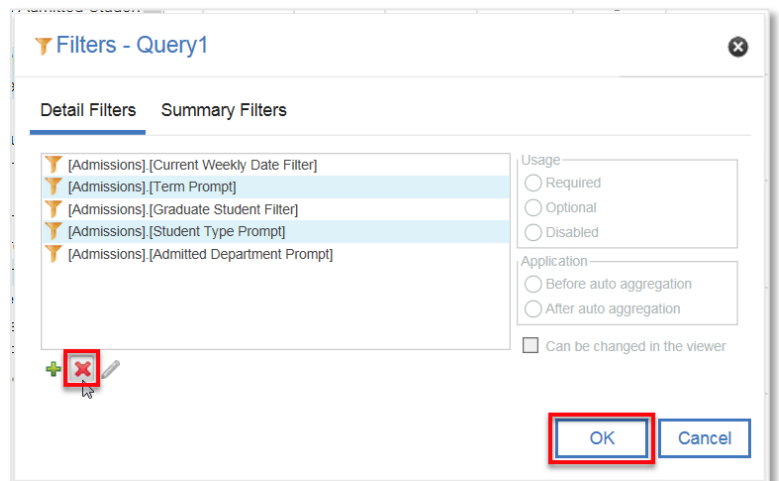
Create Custom Filter

Filters and prompt are part of each delivered package just as data items. You can also create custom filters based on the data items that are in the report.

1. Click on the column header of the data item that the filter will be based on.
   > *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...*
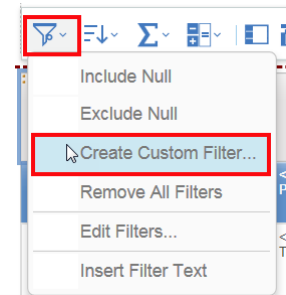
4. The *Find* box displays all the current values of the data item that was selected. Scroll through the values and select the values that will appear in the filtered report.

5. Click the *Plus* icon ⊕ directly to the right of each value.
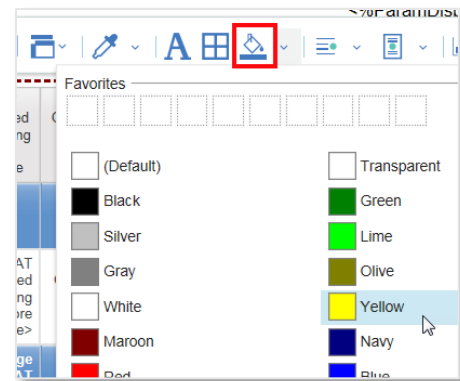   > *Repeat steps 4 and 5 until all desired values have been added.*

6. Click the *OK* button.
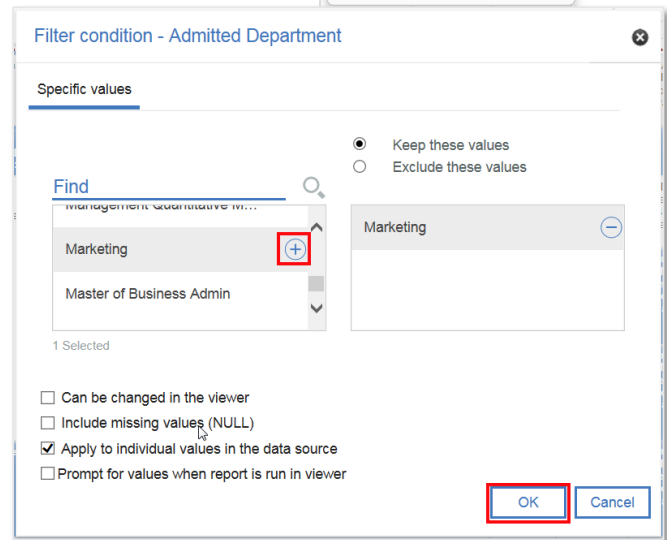
Highlight a Column

In order to draw special attention to a column, the background color can be changed.

1. Click in the column of the desired data item. *Not the column header.*

2. Click the *Background color* icon on the toolbar.
3. Select the color.

Create a Report Title

A report title can have as many lines as the user desires, but each line must be added in two steps.

1. Click the *Toolbox* icon in the top, left corner.
2. Drag and drop the *Block* tool in the desired location on the report. To do this:

    i.   Click down the left button of the mouse on the word *Block*.
    ii. While holding the button down, move the mouse to the top of the report.
    iii. Once there is a blinking line on the left side of the report, release the left mouse button.

3. Now that the Block is in place, drag and drop the *Text item* in the block. To do this:

    i.   Click down the left button of the mouse on the word *Text item*.
    ii. While holding the button down, move the mouse over the block.
    iii. Once the inside of the block is outlined in a dark dotted line, release the left mouse button.

4. In the *Text* pop up window, type the title of the report.
5. Click the *OK* button.
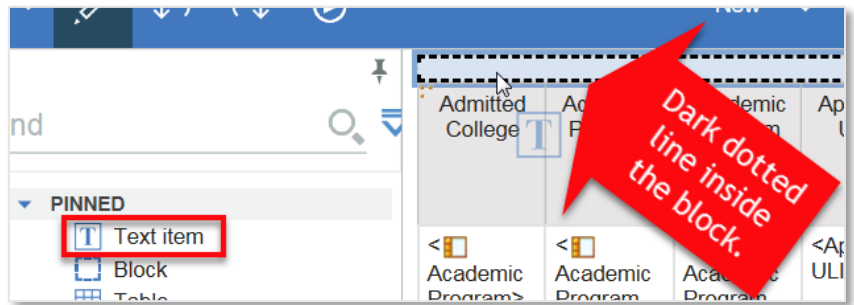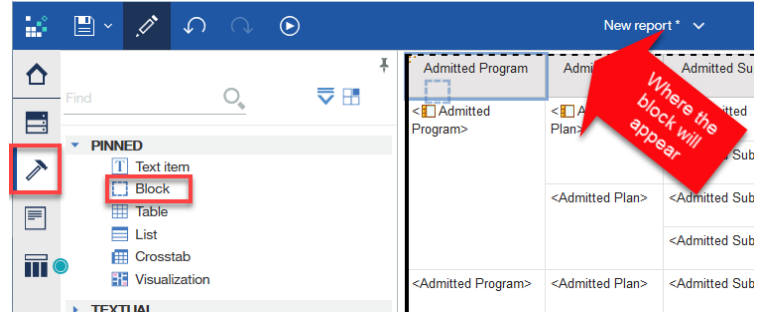
Change Report View (Preview Data)

The default view while editing a report is the *Page design* view. This means that the information is not populated in the report. At any point, the report view can be changed.

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.
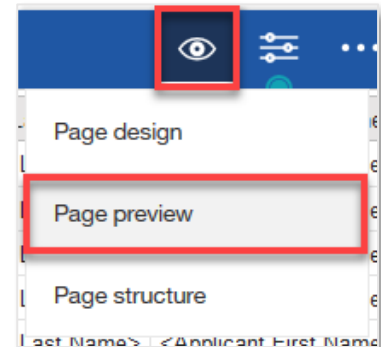
Save Report in My Content

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 displayed in the report is **NOT** being saved. This data will be updated when the package data is updated.*

1. Click the arrow next to the *Save* icon.
2. Click *Save as*.
3. In the left pane, click on *My content.*
4. Use the *Save as* field to give the report a meaningful name.
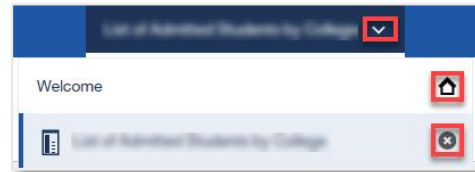5. Click the *Save* button.
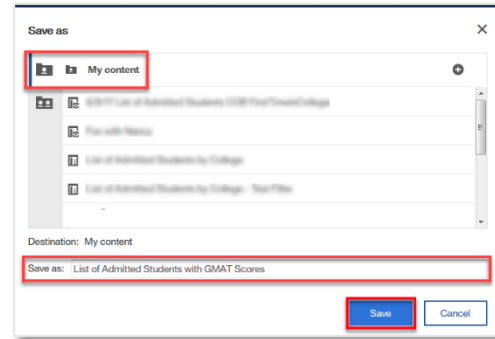
Return to the Home/Welcome Screen

When you are done viewing a report, you can go back to the Welcome page two different ways:
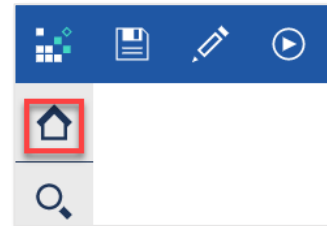
Switcher Drop Down:
1. Click the dropdown arrow by the report name.
2. Select *Home* icon, or select the ⊗ next to each page to close it.

Home Icon
1. Click the *Home* icon in the upper left corner.

The *Welcome* screen will load.

Questions?

Visit data.IllinoisState.edu/training/
or
Contact eda@ilstu.edu