ENTERPRISE DATA AND ANALYTICS
Illinois State University

IBM Cognos Analytics

Edit a Report

The following instructions cover how to edit an existing report in IBM Cognos Analytics.

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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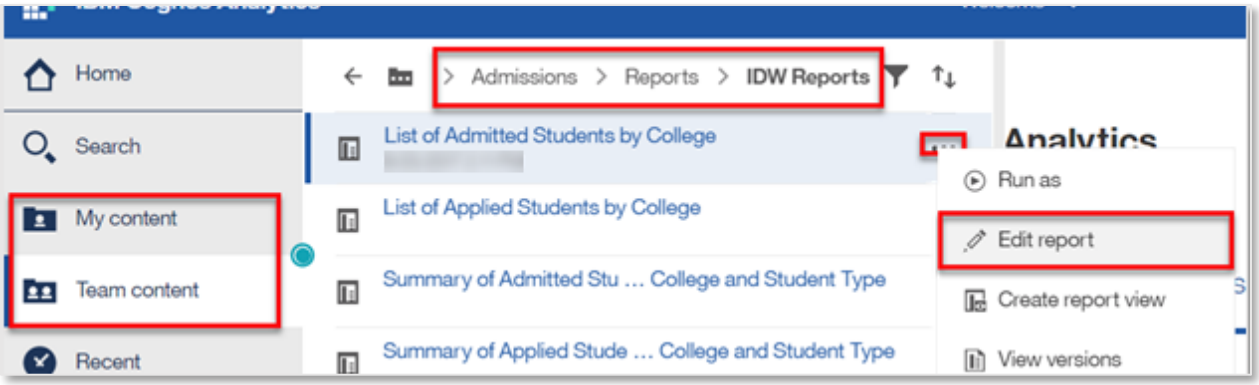
Access Report Editor from the Content Panes

In Cognos Analytics, all managed reports are housed in the *Team Content* pane. All reports you create or edit are housed in the *My Content* pane.

1. Click the ***Team Content*** icon to edit managed reports, or click the ***My Content*** icon to edit personal reports.
2. Navigate through the folder options.
3. Click the more dots ••• to the right of the report you wish to edit.
4. Click ***Edit report***.

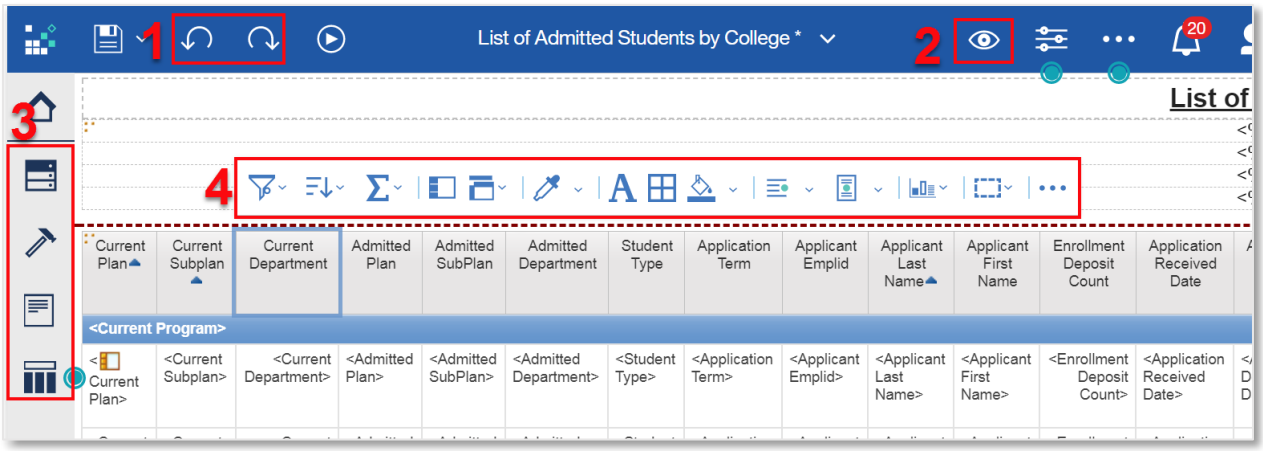


Access Report Editor Tool from the Report Viewing Screen

Users can edit a report from the report viewing screen. For instructions on how to view a report, see the **View a Report** document.

1. From the report viewer, in the upper left corner, click the ***Edit in authoring*** button. The report editor will load.

Overview of the Report Editor



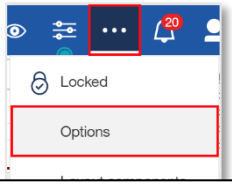
1. ***Undo and Redo*** – Used the undo and redo buttons to as you edit the report.
2. ***Page Views*** – Used to preview the report with data. The default view in the report editor does not fill in data, so that editing can be done faster.
3. ***Data Pane***:
   - ***Data*** – Contains data items and 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 edits such as sorting, summarizing, and grouping. The tool bar will only appear after you click a column header. *The picture above shows **Current Department** after being clicked.*

!Must be done before editing or creating any report!

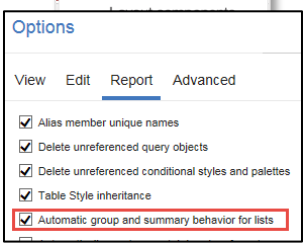
Set Report Options

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

1. Click the ***More*** icon on the upper right.
2. Click ***Options***.



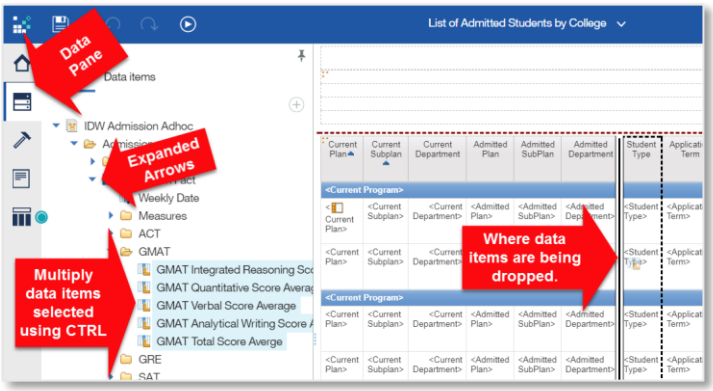
3. In the ***Options*** window, click the ***Report*** tab.
4. Uncheck ***Automatic group and summary behavior for lists***.
5. Click ***Apply***.
6. Click the ***OK*** button.



Add Data Items

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

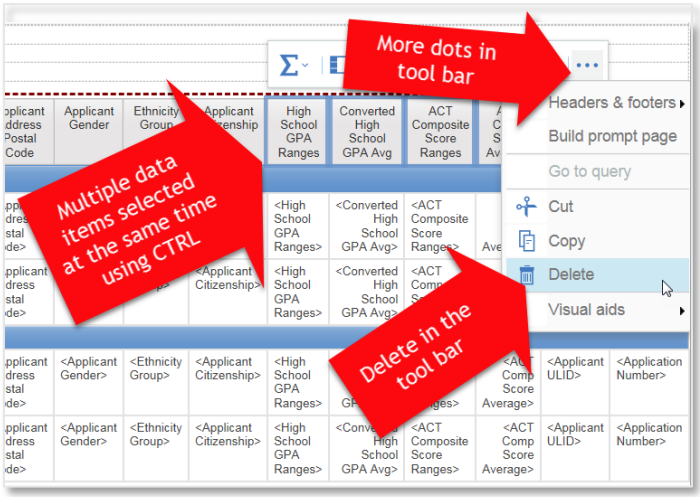
1. Click the arrow in front of the selected data source to expand.
2. Continue to click the arrows in front of the desired folders until the data item you wish to add is exposed.
3. Add the data item by double clicking:
   i. Click on the data item header immediately after where the added data item will appear in the report.
   ii. Double click on the data item that is to be added.
4. Add the data item using drag and drop:
   i. Click on the data item that is to be added.
   ii. Drag and drop the data item the report. The data item will appear where the line is blinking.
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 and drop the data items the report. The data items will appear where the line is blinking.



Delete Data Items

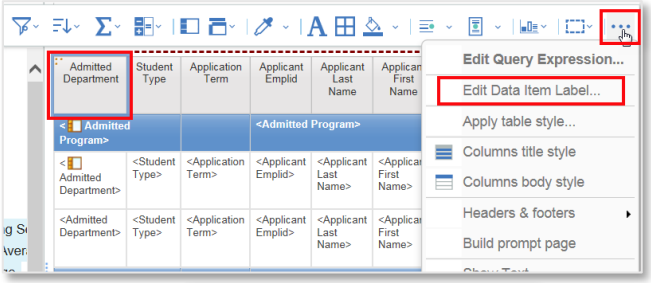
Data items can be deleted from a list report

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 options in 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 the options in step 1 or 2 above to complete the delete action.

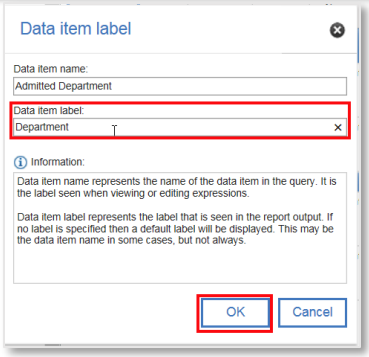


Change a Data Item's Label

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 Data Items in a List

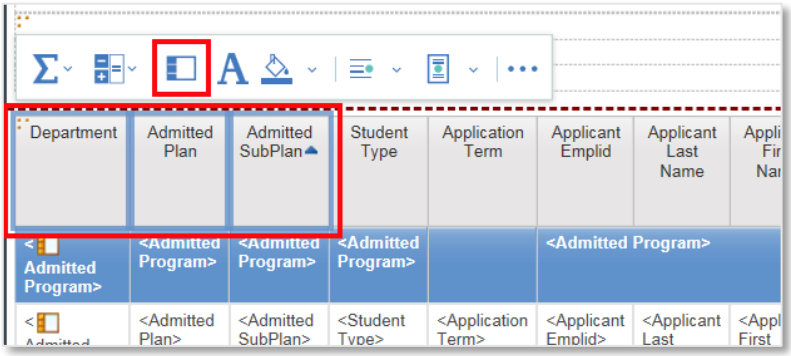
Data items can be arranged in any order.

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. Hold down the left mouse button while moving the mouse over the report until a line is blinking where the data item is being moved to.
3. Drop the data item in place by releasing the left mouse button.

Group Data Items

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

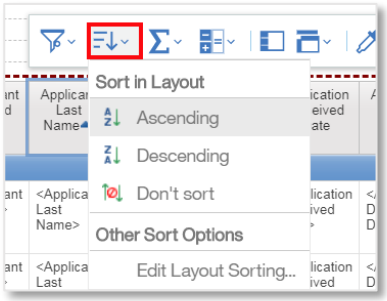
1. Click on the column header of the data item that is being grouped.
   If grouping more than one data item, hold down the **Control** *key while clicking the column headers of each additional data item.*
2. Click the ***Group*** icon on the tool bar.



Sort Data Items

Information can be sorted in alphabetical 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 being sorted.
2. Click the ***Sort*** icon .
3. Select from the sort options.

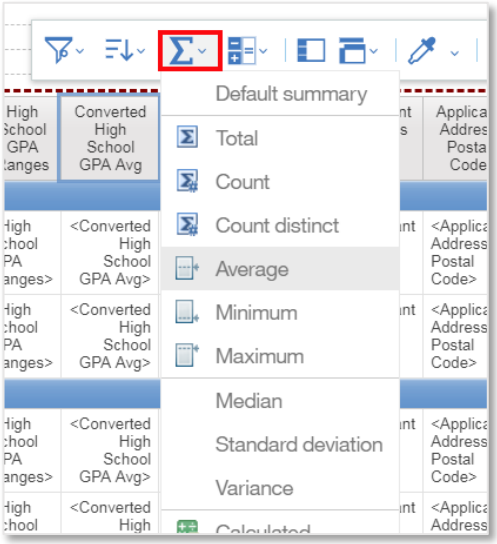


Summarize a Data Item

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

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

1. Click on 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 headers of the additional data items.*
2. Click the ***Summarize*** icon .
3. Select from the summarize options.
   Total – the sum of all values added together.
   Count – the number of rows.



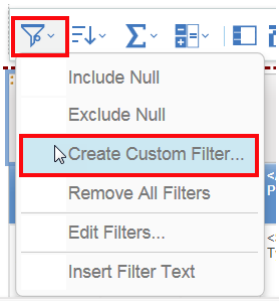
Apply Filters and Prompts

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.

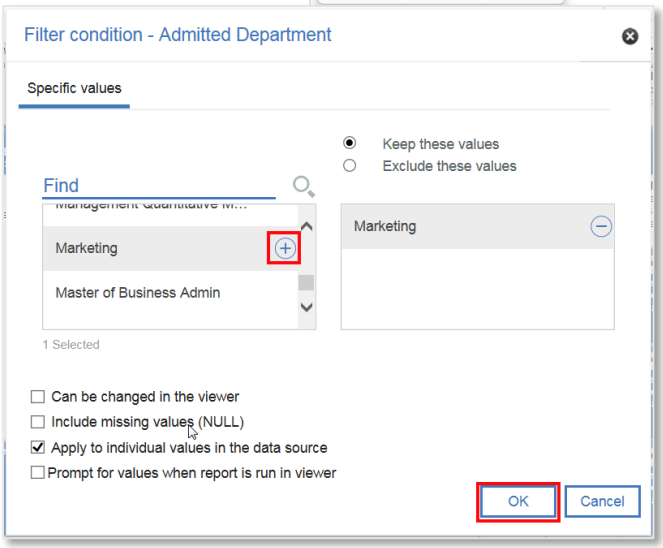
1. Under the Source tab in the ***Data*** pane, on the left side of the screen, click the arrow in front of the ***Filters and Prompts*** folder to expand the folder and see all prompts and filter that are include in the package.
2. Add one filter/prompt at a time:
   i. Double click on the filter that needs to be added.
3. Add several filter/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.

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.



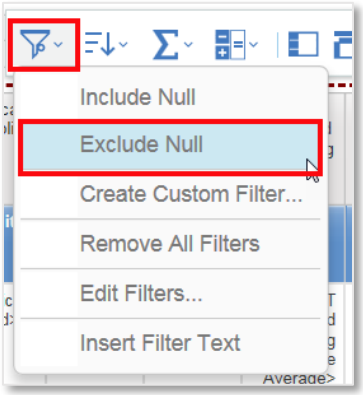
1. Click on the column header of the data item that the filter will be based on.
   The data item that you wish to filter on must be present in the report.
2. Click the ***Filter*** icon on the toolbar.
3. Click ***Create Custom Filter...***



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.

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.



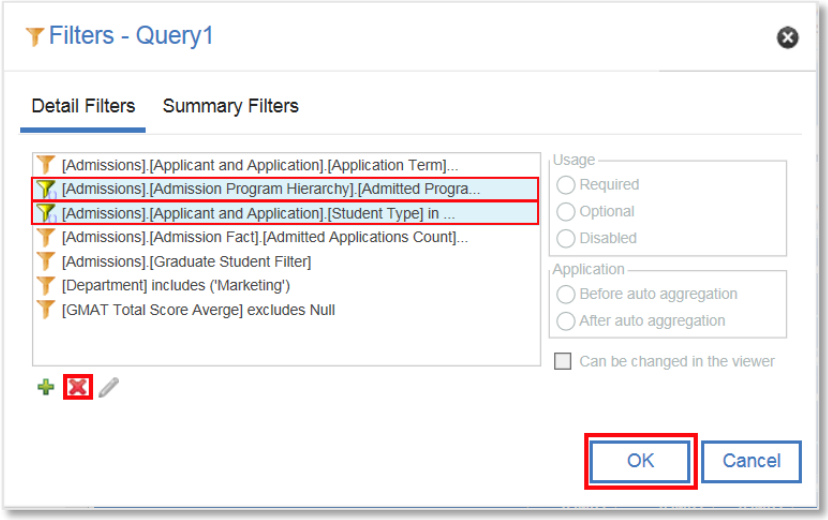
1. Click the column header of the data item that the null filter is being applied to.
2. Click the ***Filter*** icon on the toolbar.
3. Click ***Exclude Null***.

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. Click on the one that is being deleted.

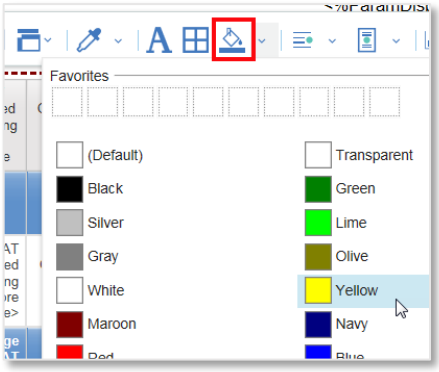
   *If more than one is being deleted, hold down the **Control** key while clicking on the additional filters and prompts.*
5. Click the ***Delete*** icon.
6. Click the ***OK*** button.



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.

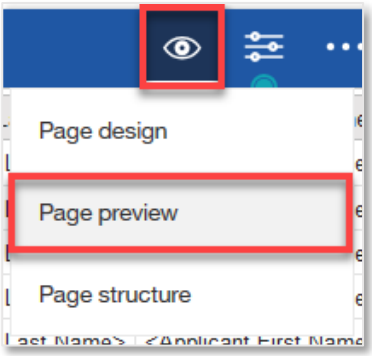


Change Report View (Preview Data)

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.

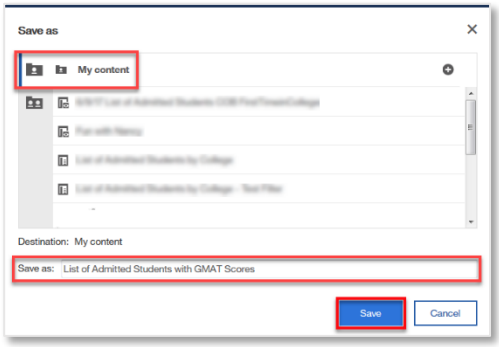


Save Report in My Content

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.

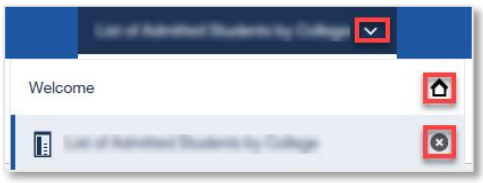


Return to the Home/Welcome Screen

When you are done viewing a report, you can go back to the Welcome page two different ways:

Switcher Drop Down:

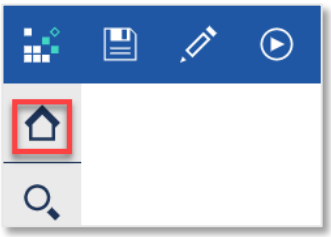
1. Click the dropdown arrow by the report name.
2. Select ***Home*** icon, or select the next to each page to close it.



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