Analysis / Intelligence: Cognos 11

Transition Guide

Last Revised: July 8, 2021

Applies to these SAP Concur solutions:

- ☒ Expense
  - ☒ Professional/Premium edition
  - ☒ Standard edition
- ☒ Travel
  - ☒ Professional/Premium edition
  - ☒ Standard edition
- ☒ Invoice
  - ☒ Professional/Premium edition
  - ☒ Standard edition
- ☒ Request
  - ☒ Professional/Premium edition
  - ☒ Standard edition

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Revision History

Date	Revision Notes/Comments
January 13, 2022	Updated the copyright year; no other changes; cover date not updated
July 8, 2021	Applied minor edits and fixed some typos in the guide.
June 22, 2021	Fixed typo. Added "Studio" to "Query Studio" in the following sentence: Query Studio is accessed from the **New** menu on the left navigation pane by clicking **New > Other > Query Studio**.
June 21, 2021	Initial publication

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Cognos 11

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Section 1: Overview

The SAP Concur reporting solutions known as Analysis and Intelligence are powered by IBM® Cognos®. Currently, these solutions use Cognos version 10.2.1, and we are updating to Cognos version 11.1.7. This change comes with an updated user interface (UI) to improve customer experience, and Cognos version 11.1.7 is designated by IBM as a Long Term Support (LTS) release.

This update brings some enhancements to Analysis and Intelligence, such as the following:

- Enhancements to the user interface (UI):
  - More modern looking interface
  - Instead of hovering over actions such as 'run a report', 'schedule a report', and more menu items, they can be found with just a right click.
- Report Studio is renamed to **Report** in Cognos 11
  - Report now has data element searching within the Concur Data Warehouse Model

NOTE: The Cognos 11 update does not impact Standard Reports or existing data elements offered within the Concur Data Warehouse Model. It is an update to the UI only. All existing custom reports will be retained by design.

However, customers should pause on authoring new reports on the Friday before they are scheduled to be migrated. Any reports in-progress over their migration weekend may not be reflected after the upgrade.

Any scheduled reports queued during the assigned Saturday update window will not run, similar to your experience during a regularly scheduled maintenance window.

The following pages describe the enhancements.

In this Guide

In this guide, the current Cognos version 10 user interface is called the *Cognos 10 UI*. The Cognos version 11 user interface is called *Cognos 11 UI*.

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Affected Users

This update only impacts users who have access to Analysis and Intelligence on the Reporting tab within SAP Concur solutions. This includes users with the following system roles:

- Cognos Consumer
- Cognos Business Author
- Cognos Professional
- BI Manager (depending on your set up, may be all people managers)

Screen Samples and Features

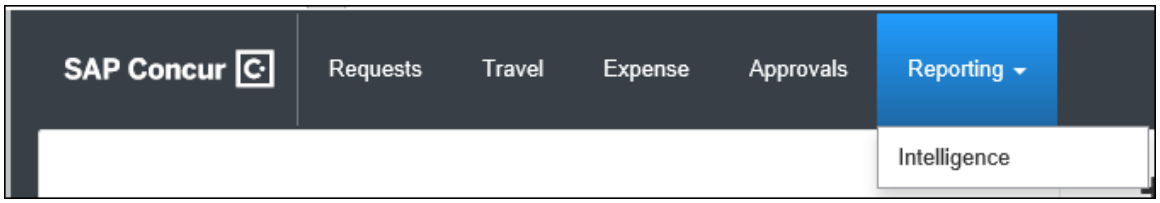
Your user role assignments and company configuration determine which features you have access to in the Analysis or Intelligence products, so the fields, layout, options, and other functionality shown in this guide may differ from those chosen by your company.

Section 2: Accessing Cognos

There are no changes to how Cognos is accessed from within the SAP Concur solutions.

To access Analysis from within SAP Concur solutions, click **Reporting > Analysis**.

To access Intelligence from with SAP Concur solutions, click **Reporting > Intelligence**.



Section 3: Home Page

When you click Analysis or Intelligence from the **Reporting** menu in SAP Concur solutions, the Cognos Home page appears.

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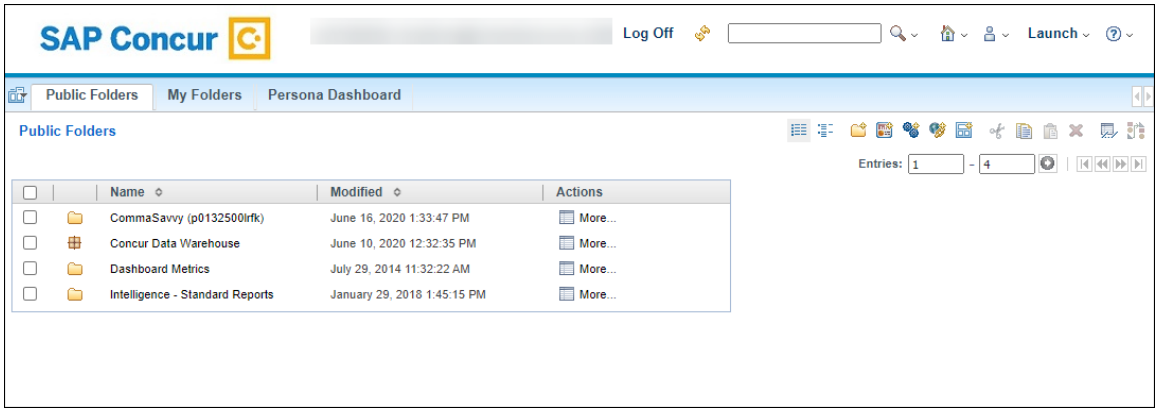
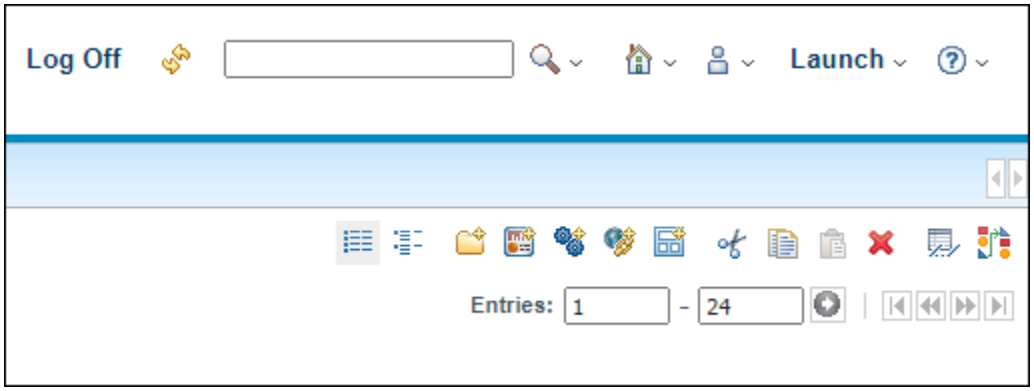
Cognos 10 UI

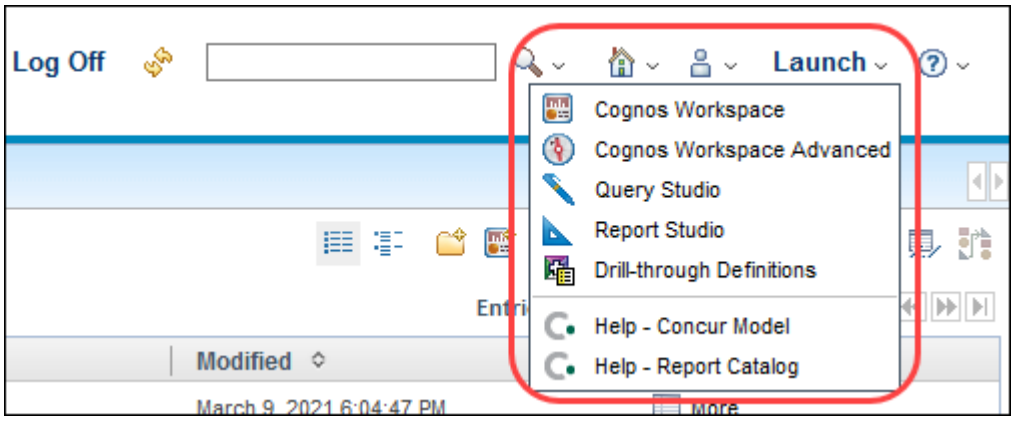
In Cognos 10, the Home page defaults to the Public Folders view, but you can customize the Home page to display to specific page, report, or dashboard of your choosing by clicking the home icon, , and then clicking *Set View as Home*.



The Home page contains a number of icons for managing the view and reports.



The **Launch** menu provides access to the Cognos Workspace features, Report Studio, Query Studio, and the SAP Concur Analysis / Intelligence Help.



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Cognos 11 UI

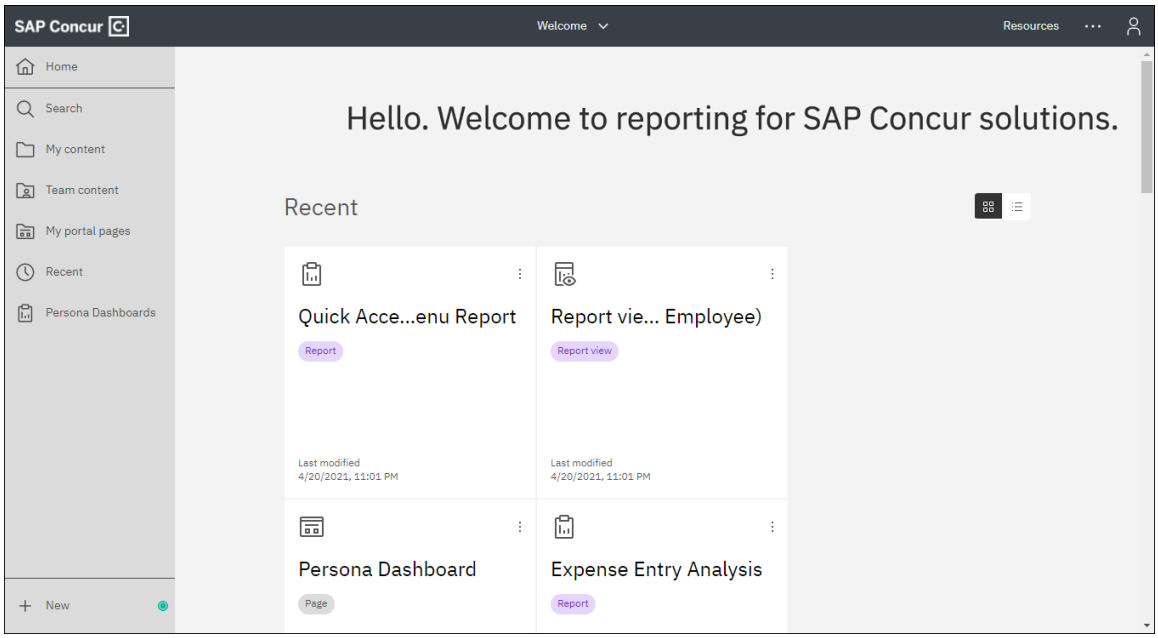
In Cognos 11, the Home page defaults to the Welcome page, which contains a list of the most recently viewed reports, dashboards, and pages. Like the Cognos 10 UI, you can customize the Home page to default to a page, report or dashboard of your choosing by clicking the **More** icon, , in the top navigation bar, and then clicking *Set as home*.

In Cognos 11, most of the icons are now located on the left navigation pane instead of the upper-right corner of the Home page.

The public and personal folders and the Persona Dashboards are now also available from the left navigation pane. Some of the features in the existing UI have been renamed in Cognos 11. For example, **Public Folders** is now renamed to **Team content** and **My Folders** is now renamed to **My content**.

For more information about the icons on the Home page, refer to the *Icons* section in this guide.

For more information about navigating in Cognos 11, refer to the *Navigation* section in this guide.



ICONS

A number of icons previously available on the Cognos 10 Home page are no longer available on the Cognos 11 Home page, but the same functionality is still available in Cognos 11. The access to the functionality has just been moved to another part of the UI in Cognos 11.

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For example, in Cognos 10, there are icons for creating a new folder, , or job, , and for copying selections, , on the Home page.

In Cognos 11, the options for creating a new folder are moved to the top of the folder list, and the option for creating a new job is accessed by clicking the **New** icon, , on the left navigation bar.

The option for copying folders or reports is now available at the individual folder, report, or dashboard level from the **More** menu, which is accessed by clicking the **More** icon, . More information about the **More** menu and where functionality is now available in Cognos 11 will be covered later in this guide.

NOTE: The width of your browser window and what you currently have displayed in the main view determines whether the left navigation pane displays the icons along with the icon name or whether the pane displays the icons only.

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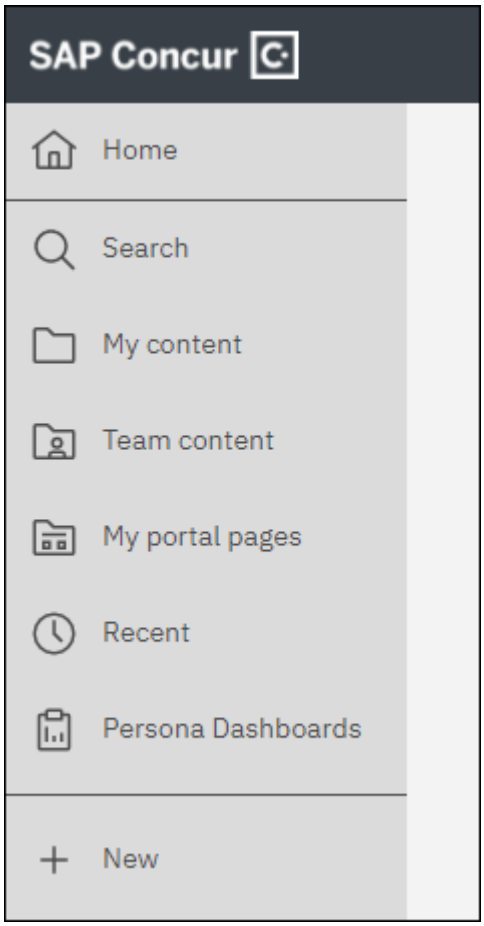
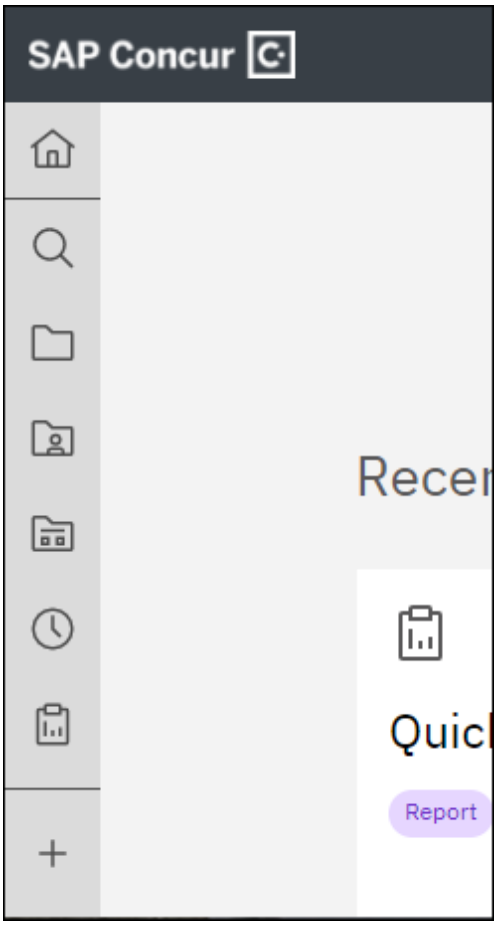
Example of left navigation pane expanded with both the icons and icon names displayed:



Example of the left navigation pane collapsed with only the icons displayed:



Home page icons key:

Icon	Name	Description
Top Navigation Bar Icons		
•••	More	Provides the **Set as home** option, which can be used to make the report, dashboard, or story currently displayed the default Home page.
	Personal menu	Provides access to **My schedules and subscriptions**, **My preferences**, **My Watch Items**, **About**, and the **Sign out** option.
Left Navigation Pane Icons		
	Home	Opens the Cognos 11 Home page.

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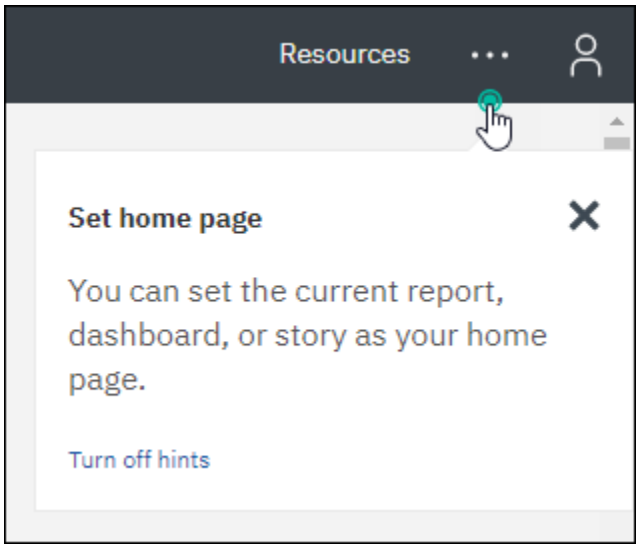
Icon	Name	Description
	Search	Opens the Search feature from the left navigation pane. The Search feature is used to globally search the **My content** and **Team content** folders for the folders, reports, dashboards, or jobs that you have access to.
	My content	The **My content** icon in Cognos 11 is the equivalent of the **My Folders** tab in the existing UI.
	Team content	The **Team content** icon in Cognos 11 is the equivalent of the **Public Folders** tab in the Cognos 10 UI. This is where you can access the **Analysis – Standard Reports** or **Intelligence – Standard Reports** folder.
	My portal pages	Opens the **My portal pages** list from the left navigation pane.
	Recent	Opens the **Recently viewed** list from the left navigation pane.
	Persona Dashboards	The **Persona Dashboards** icon in Cognos 11 is the equivalent of the **Persona Dashboard** tab in the Cognos 10 UI. Opens the **Quick Access Menu** page.
	New	Provides options for creating new jobs and accessing Report (formerly known as Report Studio), drill-through definitions, Query Studio, and Workspace.

HINTS

The green dot displayed in the Cognos 11 UI indicates a UI hint is available for that feature. Clicking the green dot opens a brief description of the feature.

You can turn off the hints feature by clicking the **Turn off hints** link.



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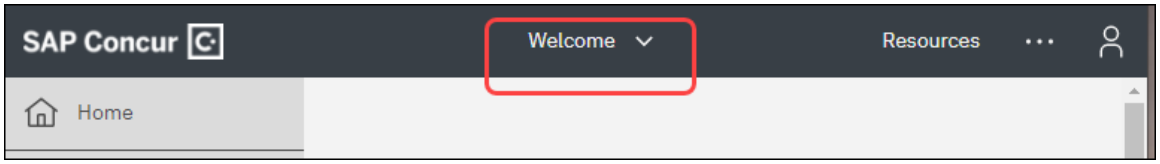
Recently Viewed List on the Top Navigation Bar

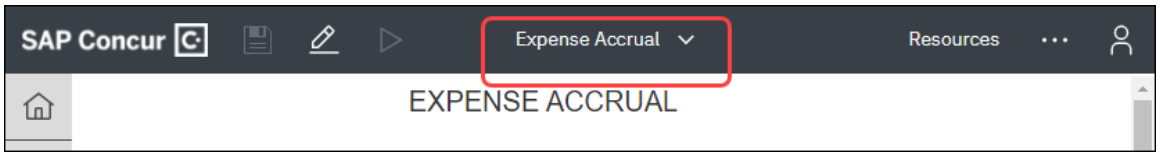
The recently viewed list on the top navigation bar provides a list of the recently viewed pages, reports, or dashboards for the current Cognos session. You can use the list to quickly navigate back to something you recently viewed. This same list of recently viewed pages, reports, and dashboards can also be accessed from the left navigation pane by clicking the **Recent** icon, .

The name of the recently viewed list on the top navigation bar displays the name of the page currently viewed.

For example, on the default Home page, the list displays *Welcome*.

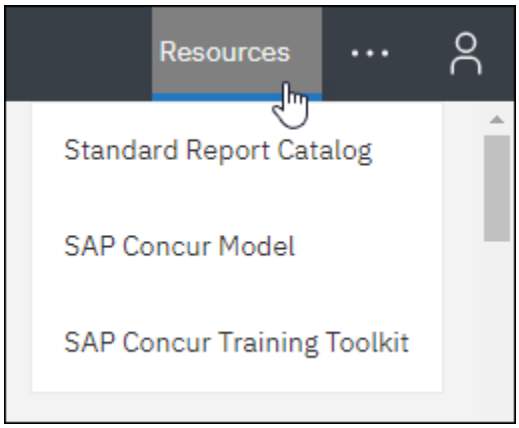


If you are viewing a report, such as the Expense Accrual report, the list displays the name of the report.



Resources Menu on the Top Navigation Bar

The **Resources** menu on the top navigation bar provides links to the Analysis / Intelligence documentation and SAP Concur Training Toolkit.



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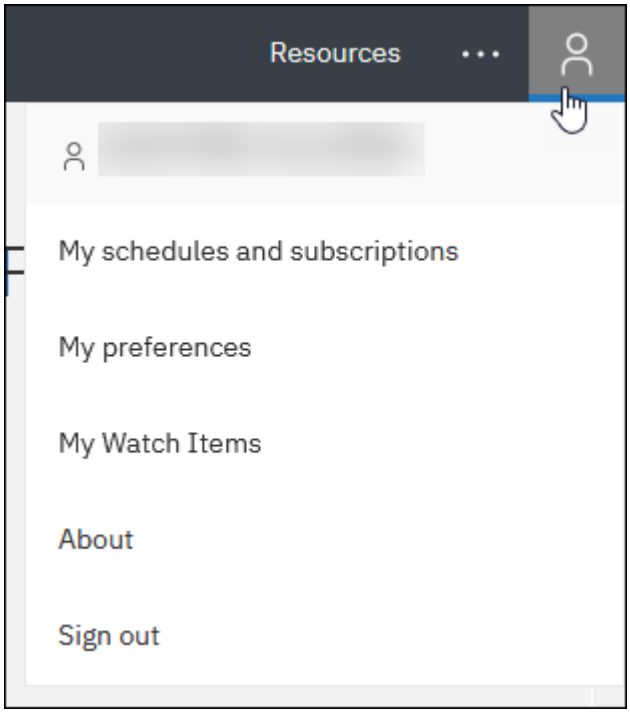
PERSONAL MENU ON THE TOP NAVIGATION BAR

The **Personal** menu on the top navigation bar provides links to your schedules, subscriptions, preferences, and watch items. It also contains the **Sign out** option for logging out of Cognos.



Section 4: Report Prompts Page and Report Output

The Cognos version 11 update does not impact Standard Reports or existing data elements offered within the Concur Data Warehouse Model. It is an update to the UI only. All existing custom reports will be retained by design.

In this section, you can see that the report prompts on the **Prompts** page and the report output remain the same between Cognos 10 UI and the Cognos 11 UI.

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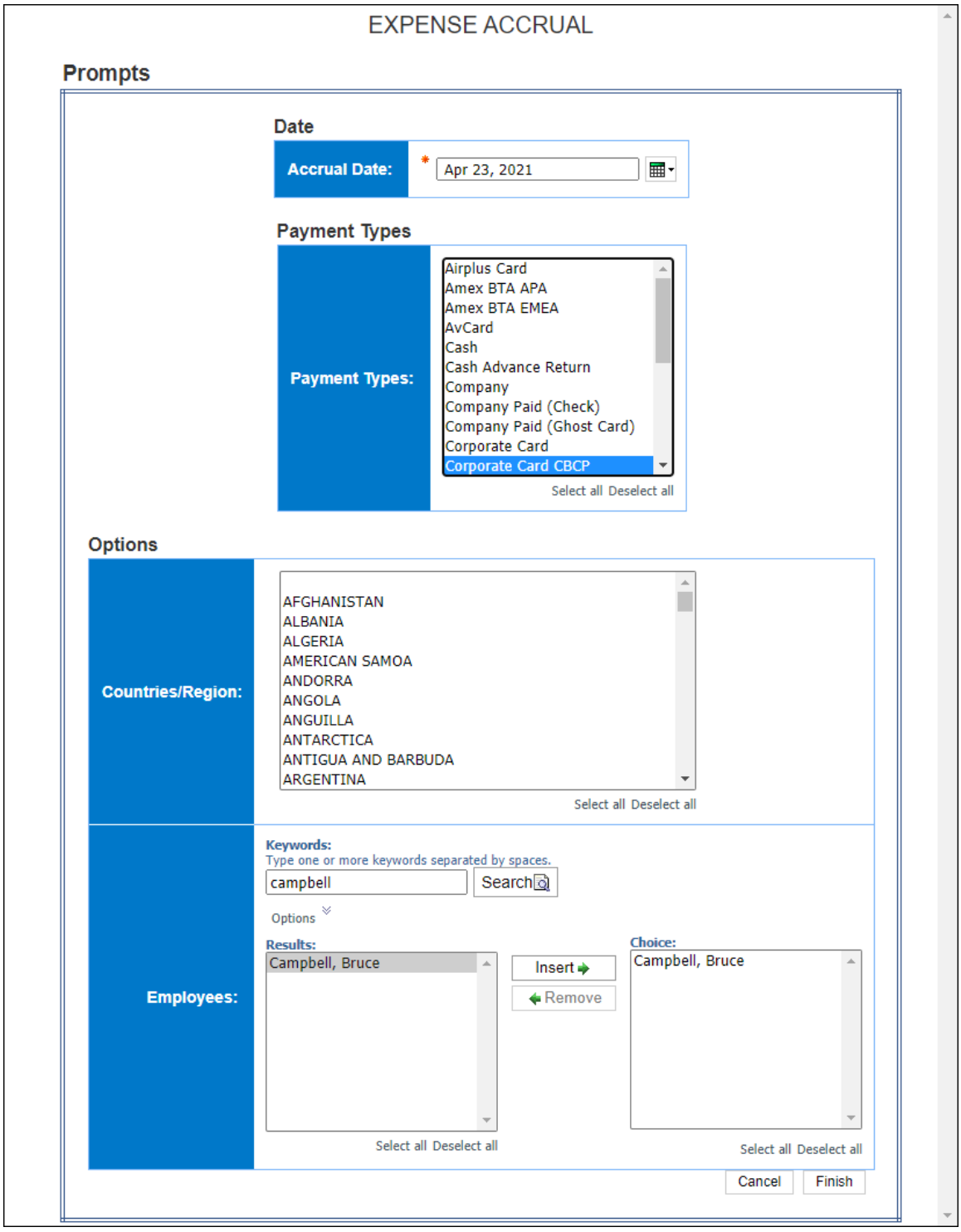
Cognos 10 UI

Example of the **Prompts** page for the Expense Accrual report.



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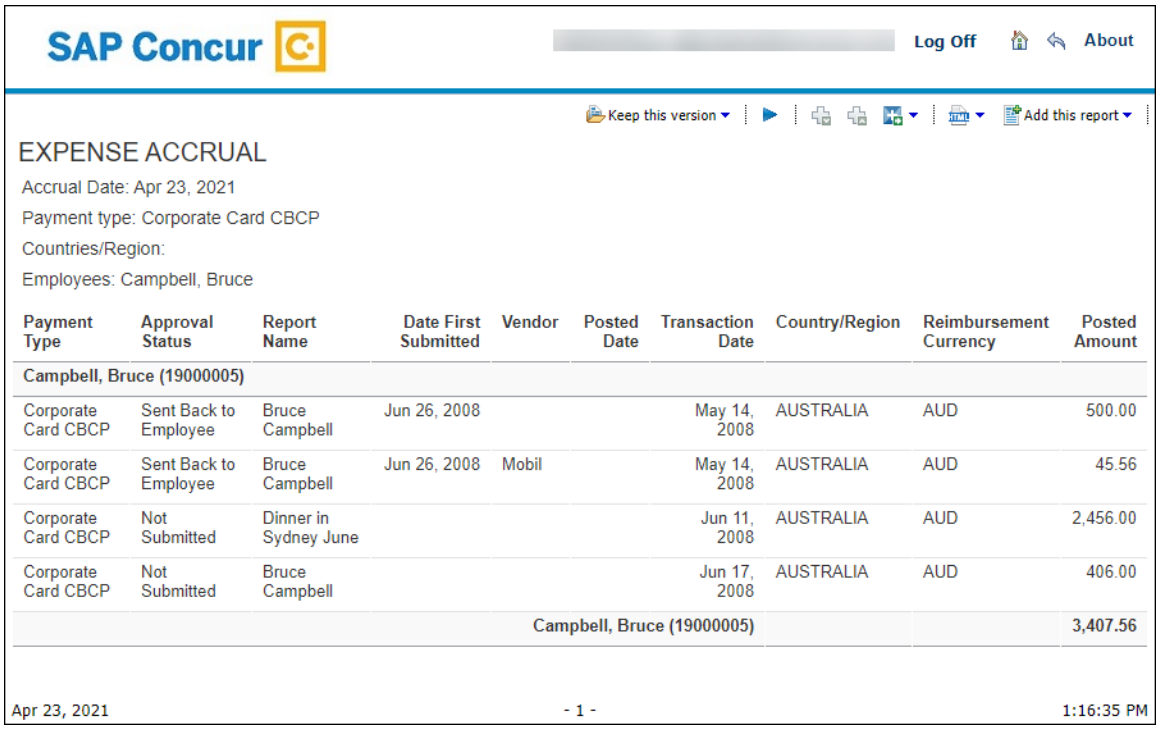
Example of the Expense Accrual report.



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Log Off About

Keep this version | Add this report

EXPENSE ACCRUAL

Accrual Date: Apr 23, 2021

Payment type: Corporate Card CBCP

Countries/Region:

Employees: Campbell, Bruce

Payment Type	Approval Status	Report Name	Date First Submitted	Vendor	Posted Date	Transaction Date	Country/Region	Reimbursement Currency	Posted Amount
Campbell, Bruce (19000005)									
Corporate Card CBCP	Sent Back to Employee	Bruce Campbell	Jun 26, 2008			May 14, 2008	AUSTRALIA	AUD	500.00
Corporate Card CBCP	Sent Back to Employee	Bruce Campbell	Jun 26, 2008	Mobil		May 14, 2008	AUSTRALIA	AUD	45.56
Corporate Card CBCP	Not Submitted	Dinner in Sydney June				Jun 11, 2008	AUSTRALIA	AUD	2,456.00
Corporate Card CBCP	Not Submitted	Bruce Campbell				Jun 17, 2008	AUSTRALIA	AUD	406.00
					Campbell, Bruce (19000005)				**3,407.56**

Apr 23, 2021 - 1 - 1:16:35 PM

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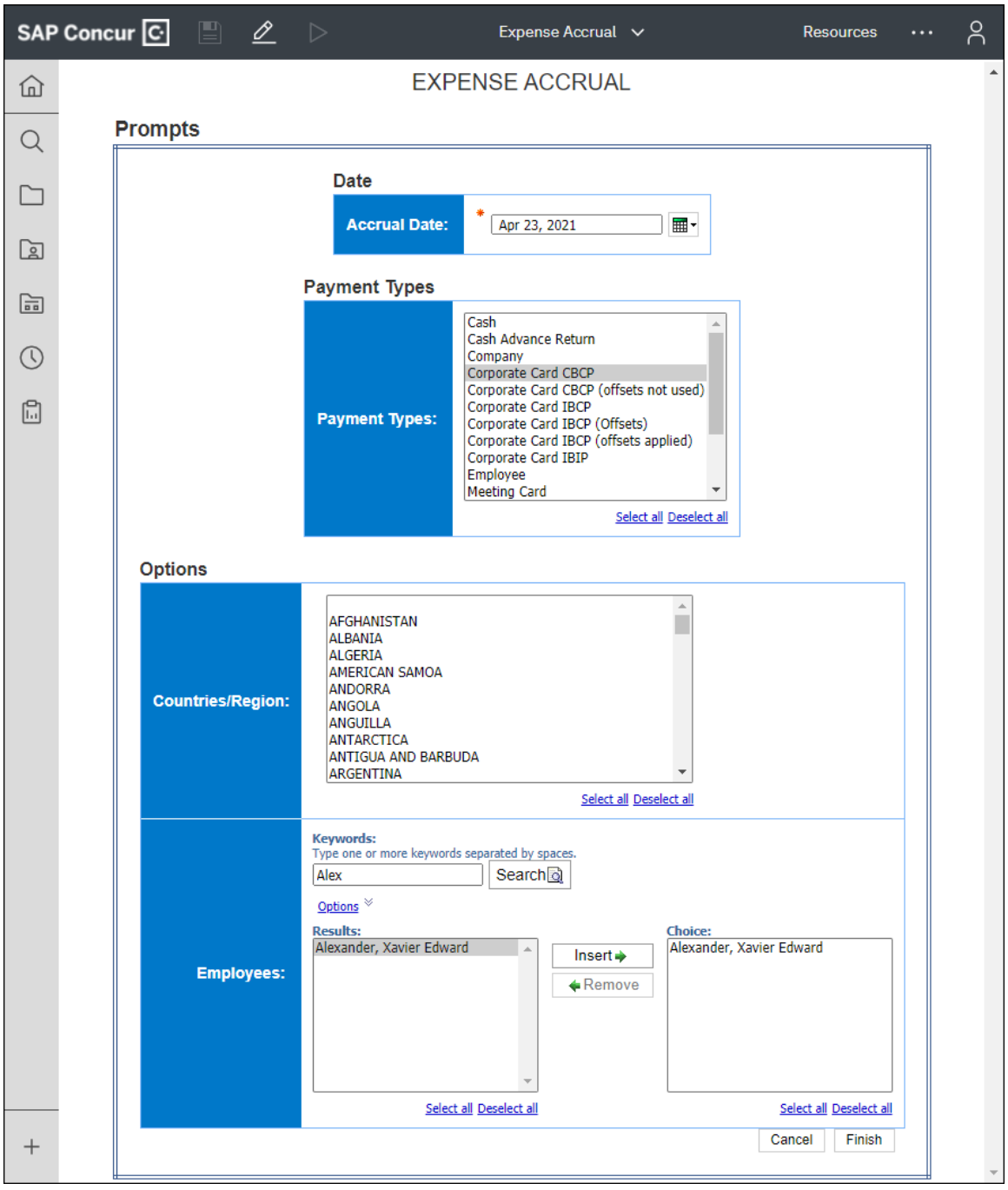
Cognos 11 UI

Example of the **Prompts** page for the Expense Accrual report.



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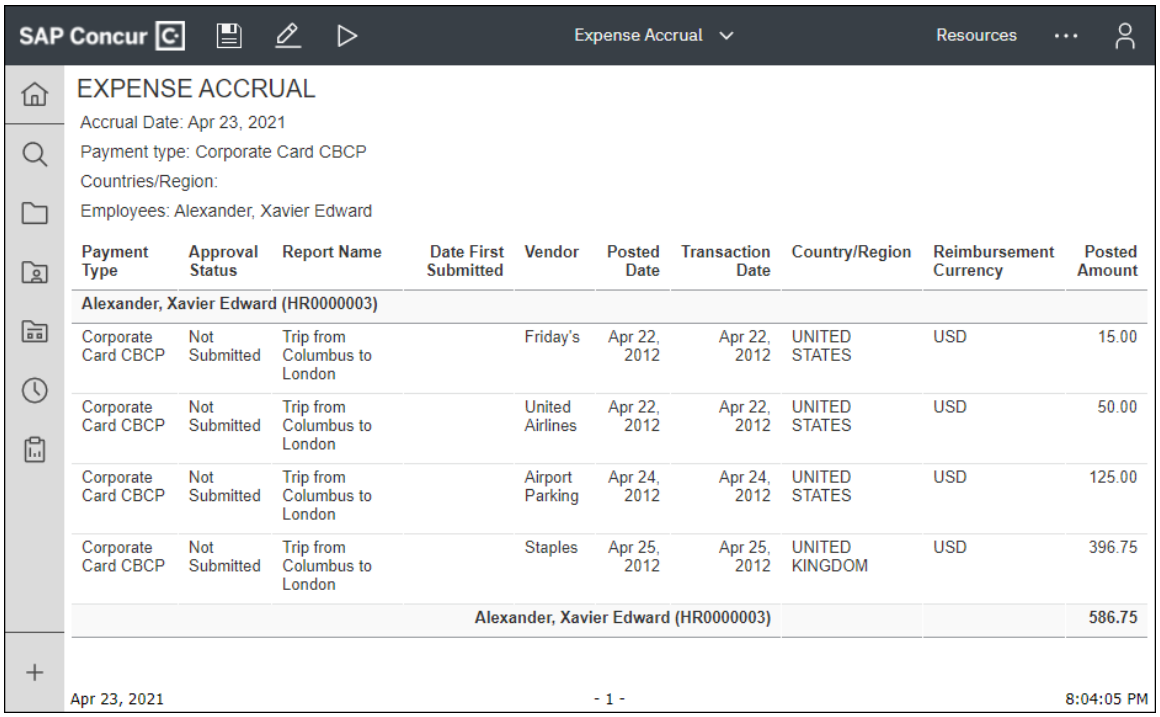
Example of the Expense Accrual report.



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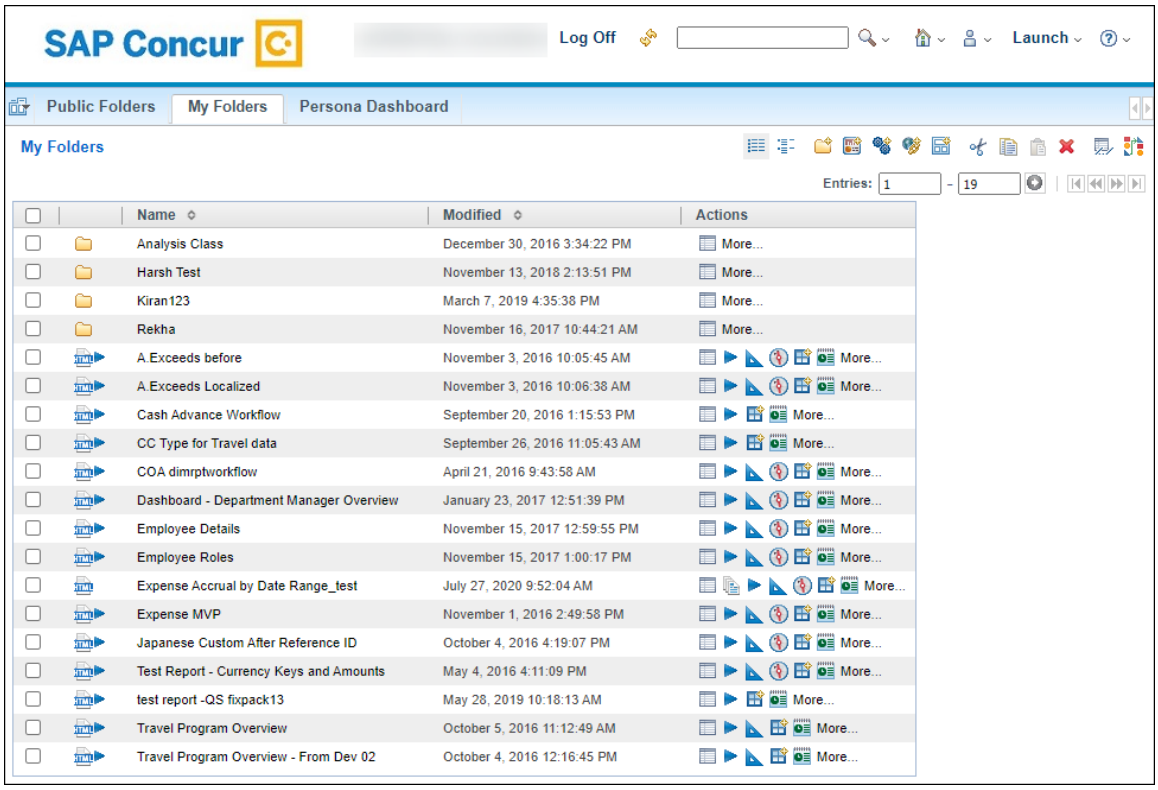
Section 5: My Content (Formerly My Folders)

In Cognos 11, the My Folders feature is renamed to My content, and the folders, and contents of the folders previously located in My Folders are now located in My content. The My content feature is where a user can store their personal reports and content. Only the creator of the content has access to the contents of the **My content** folder.

Cognos 10 UI

The My Folders feature is accessed by clicking the **My Folders** tab.



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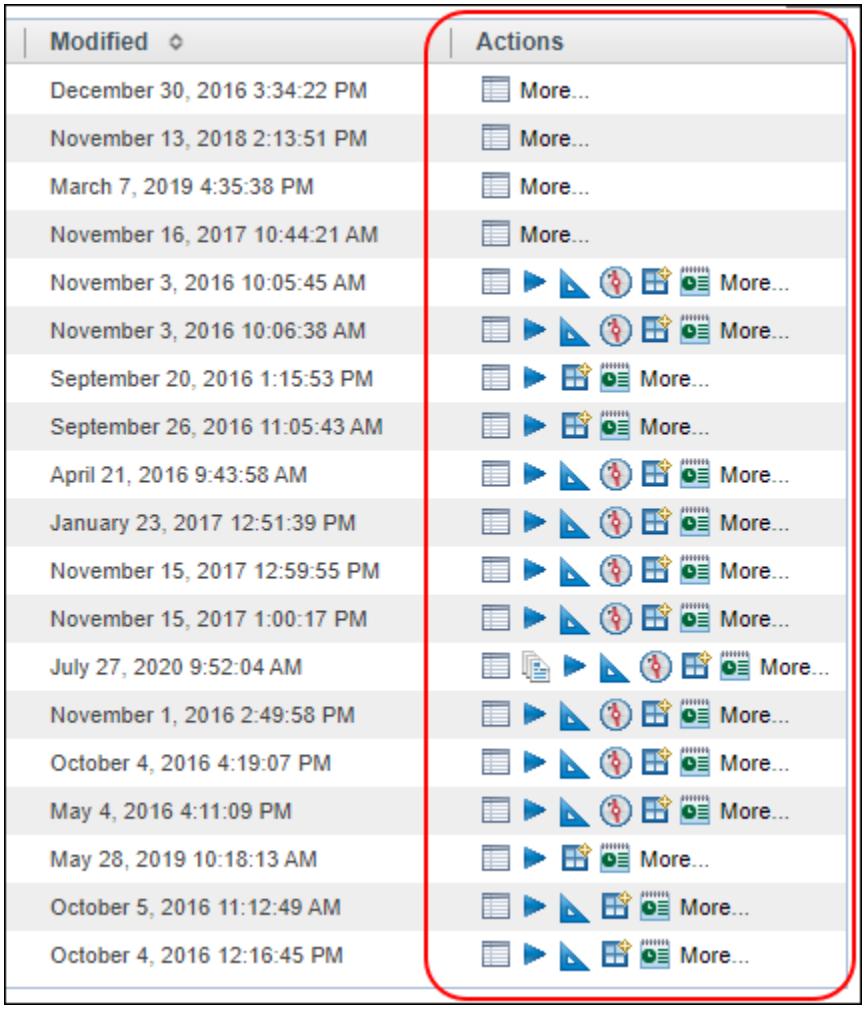
The **Actions** column contains icons for the different options for managing individual folders and reports, and the option for running reports.



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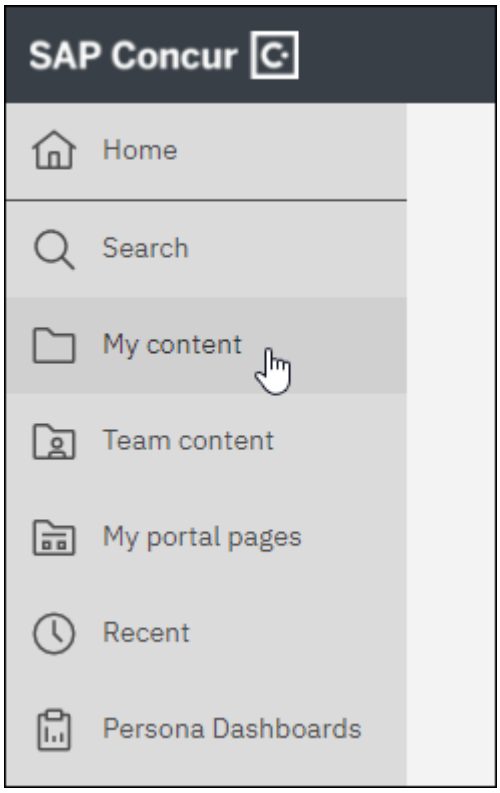
Cognos 11 UI

You can access the My content feature from the left navigation pane.



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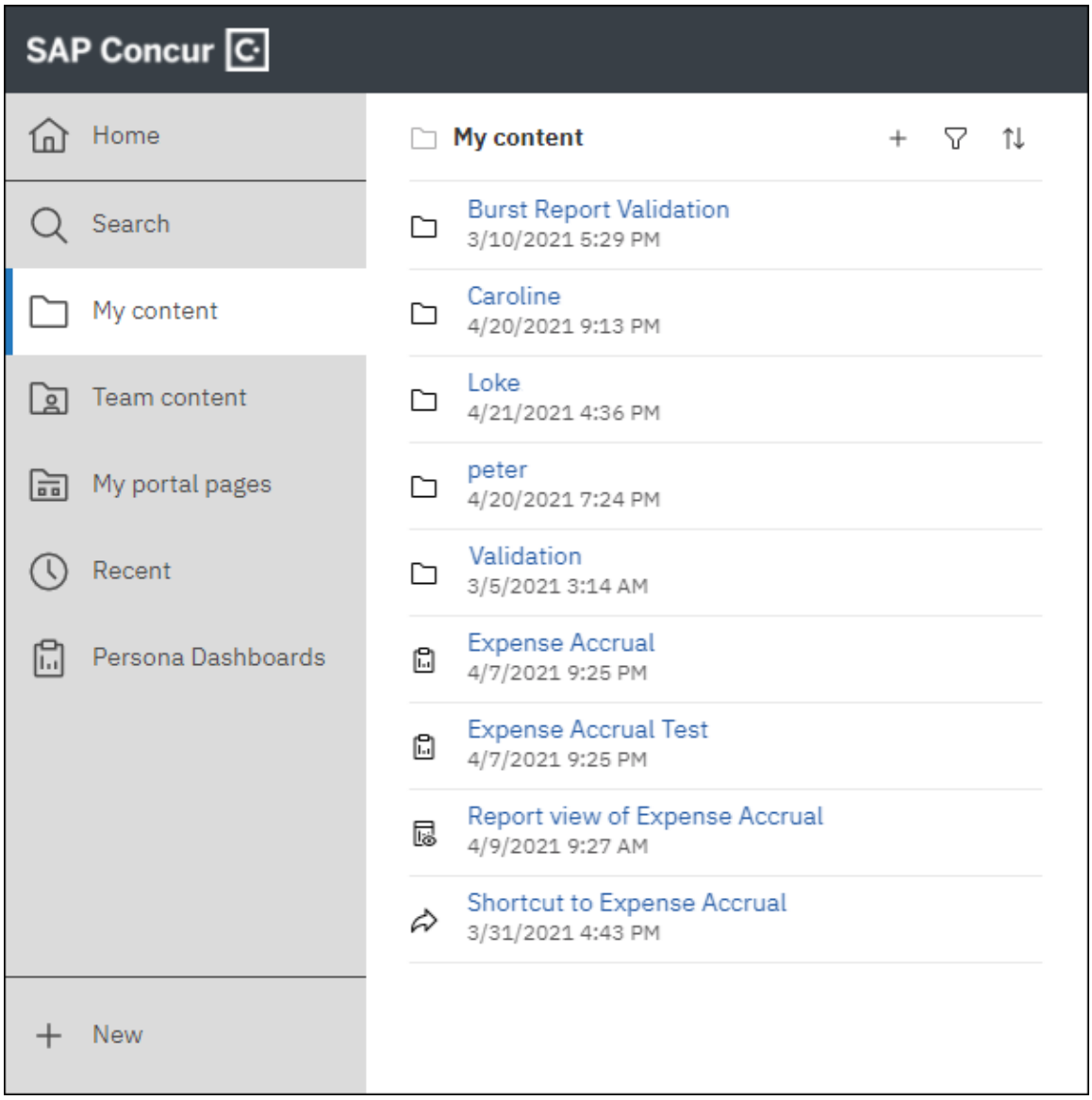
When you click My content, the contents of your **My content** folder are displayed to the right of the left navigation pane.



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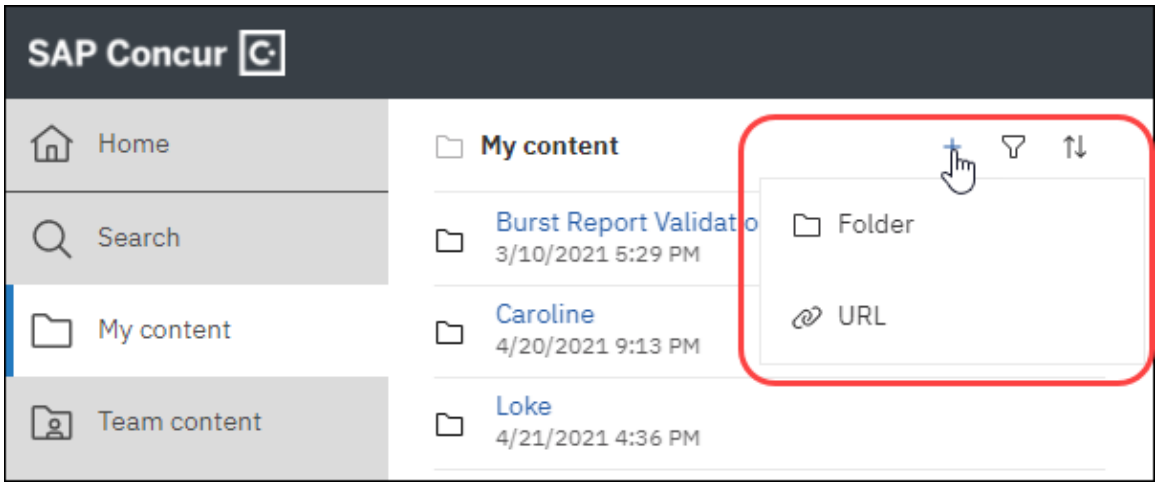
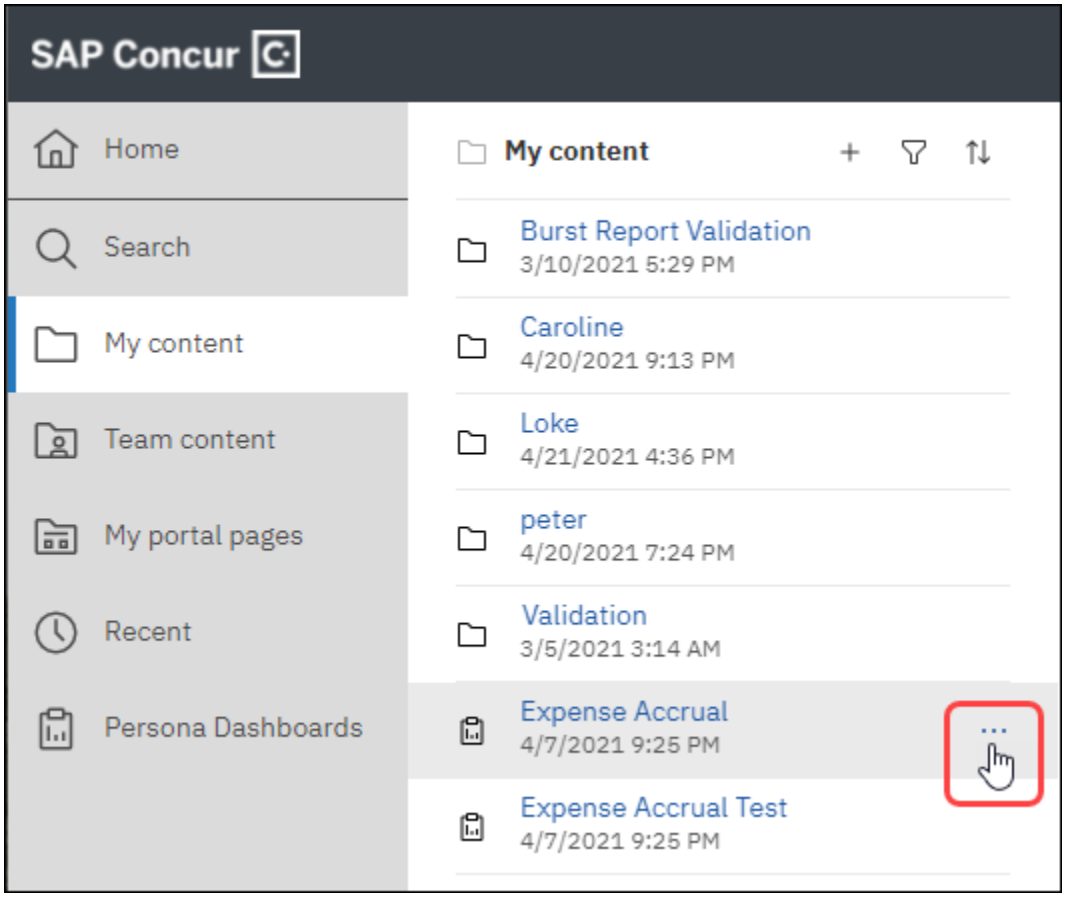
In the **My content** folder, the option for creating a new folder or URL is available at the top of the folder list by clicking the **New** icon, .



The options for managing individual folders, reports, and jobs are available on the **More** menu. To open the **More** menu, place your pointer over the individual folder, report, dashboard, or job to display the **More** icon, .



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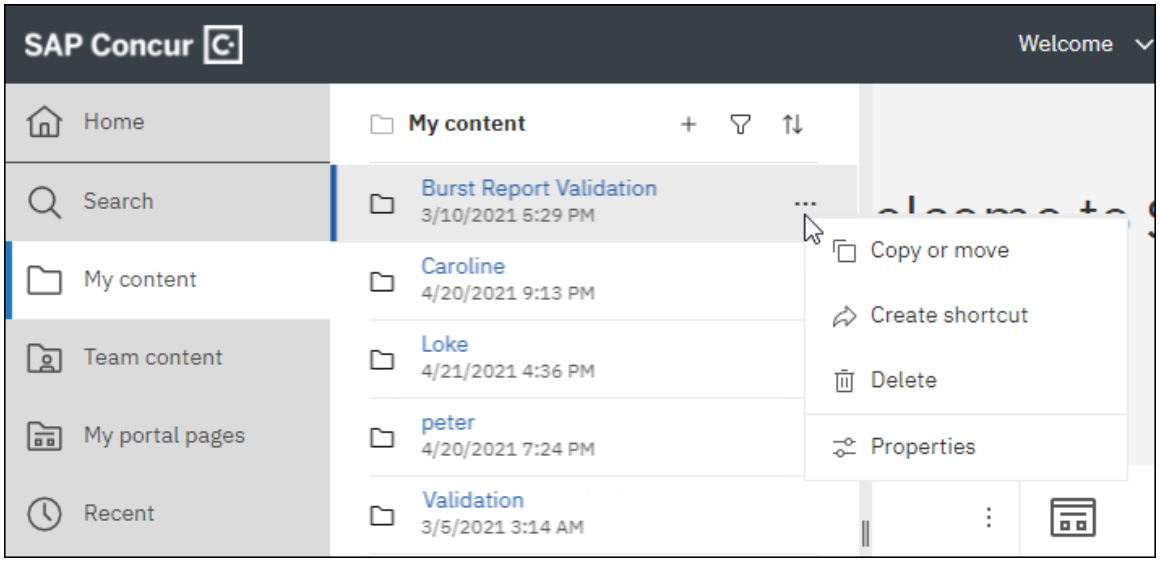
Click the **More** icon, , to open the **More** menu.

Example of the **More** menu for a folder:



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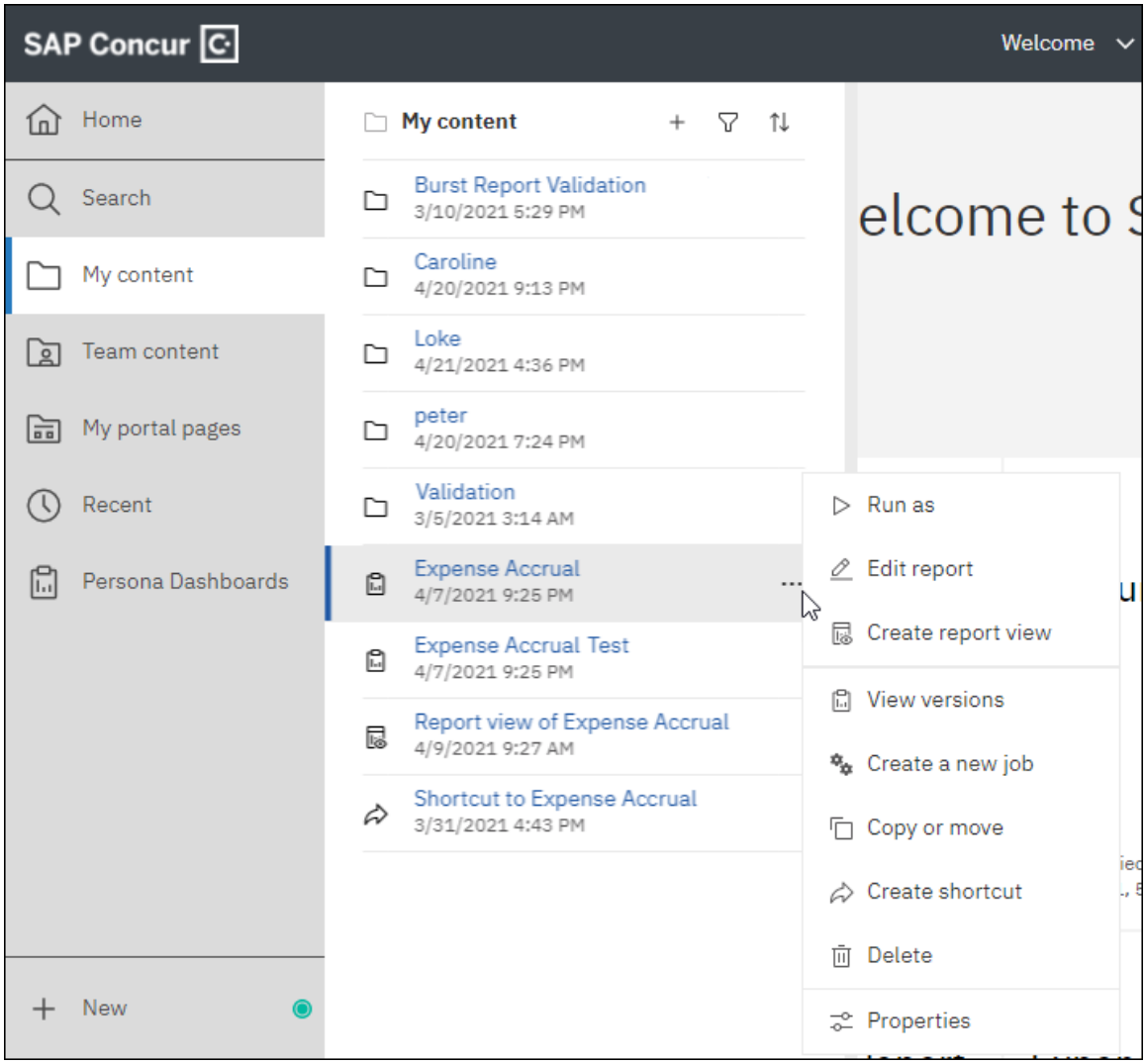
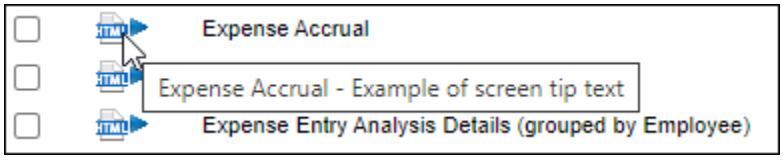
Example of the **More** menu for a report:



NOTE: The screen tip option that was available for reports in Cognos 10 is not available in Cognos 11.

In Cognos 10, the **Screen tip** field was located on the **General** tab on a report's **Set properties** page. The screen tip option allowed you to add a screen tip that was displayed next to the report name when you placed your pointer over the icon next to a report in the report list.



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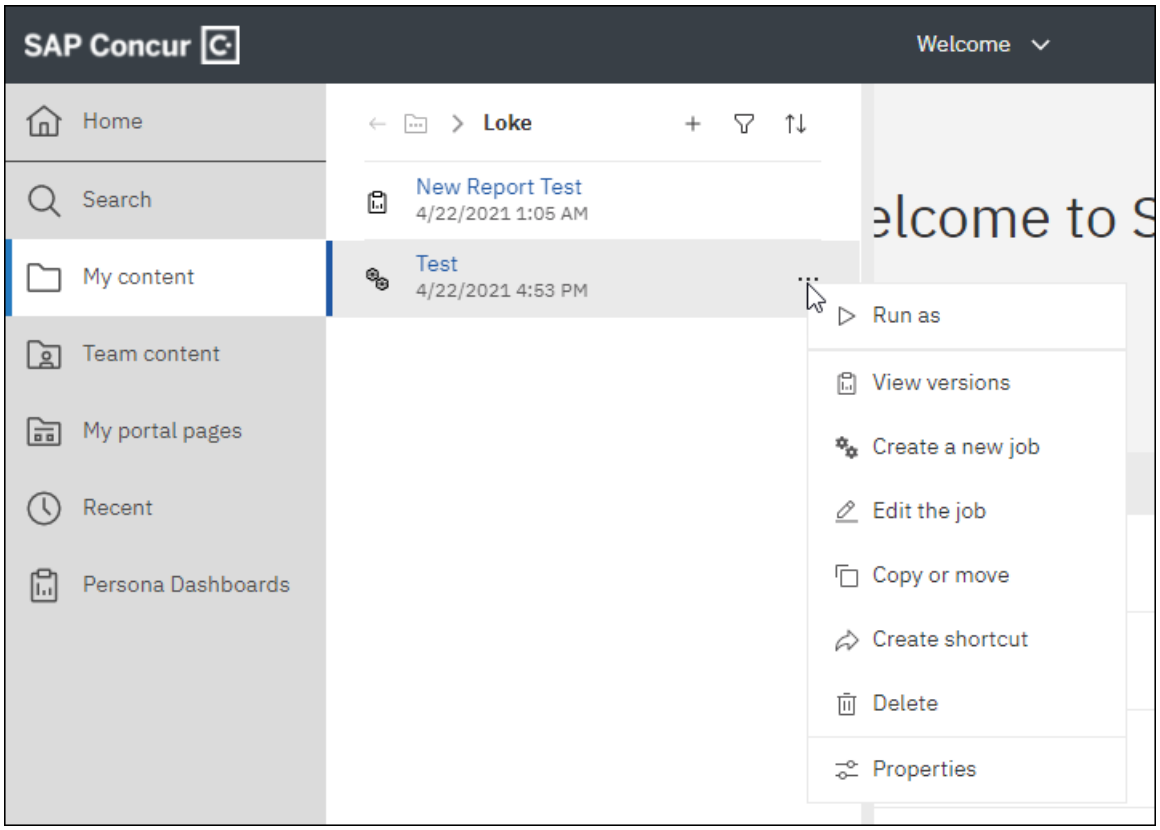
Example of the **More** menu for a job:



Section 6: Team Content (Formerly Public Folders)

In Cognos 11, the Public Folders feature is renamed to Team content, and the folders, and contents of the folders previously located in Public Folders are now located in Team content. The Team content feature is where content available to all Cognos users in your organization is stored, including the standard report catalog of dashboards and reports in the **Analysis – Standard Reports** and **Intelligence – Standard Reports** folders. A user's SAP Concur solutions' role and permission assignments determine what content in the **Team content** folder the user can access.

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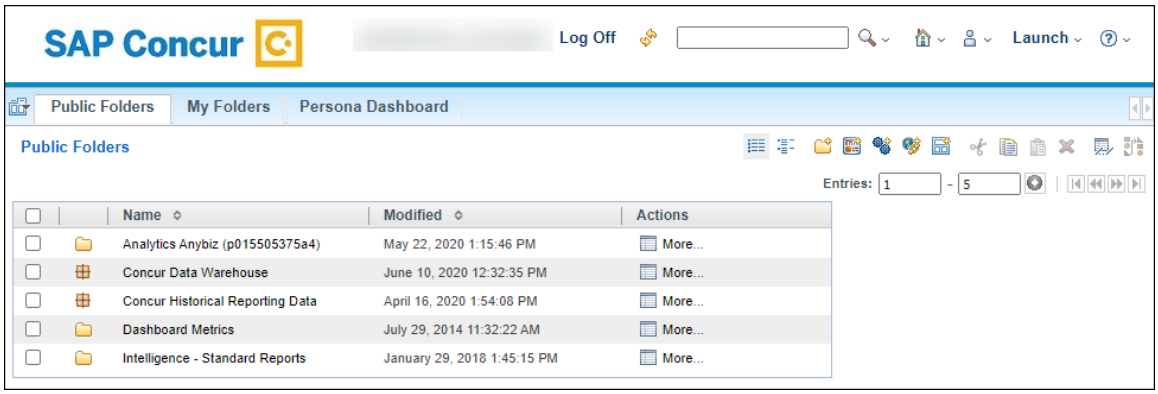
Cognos 10 UI

The Public Folders feature is accessed by clicking the **Public Folders** tab.



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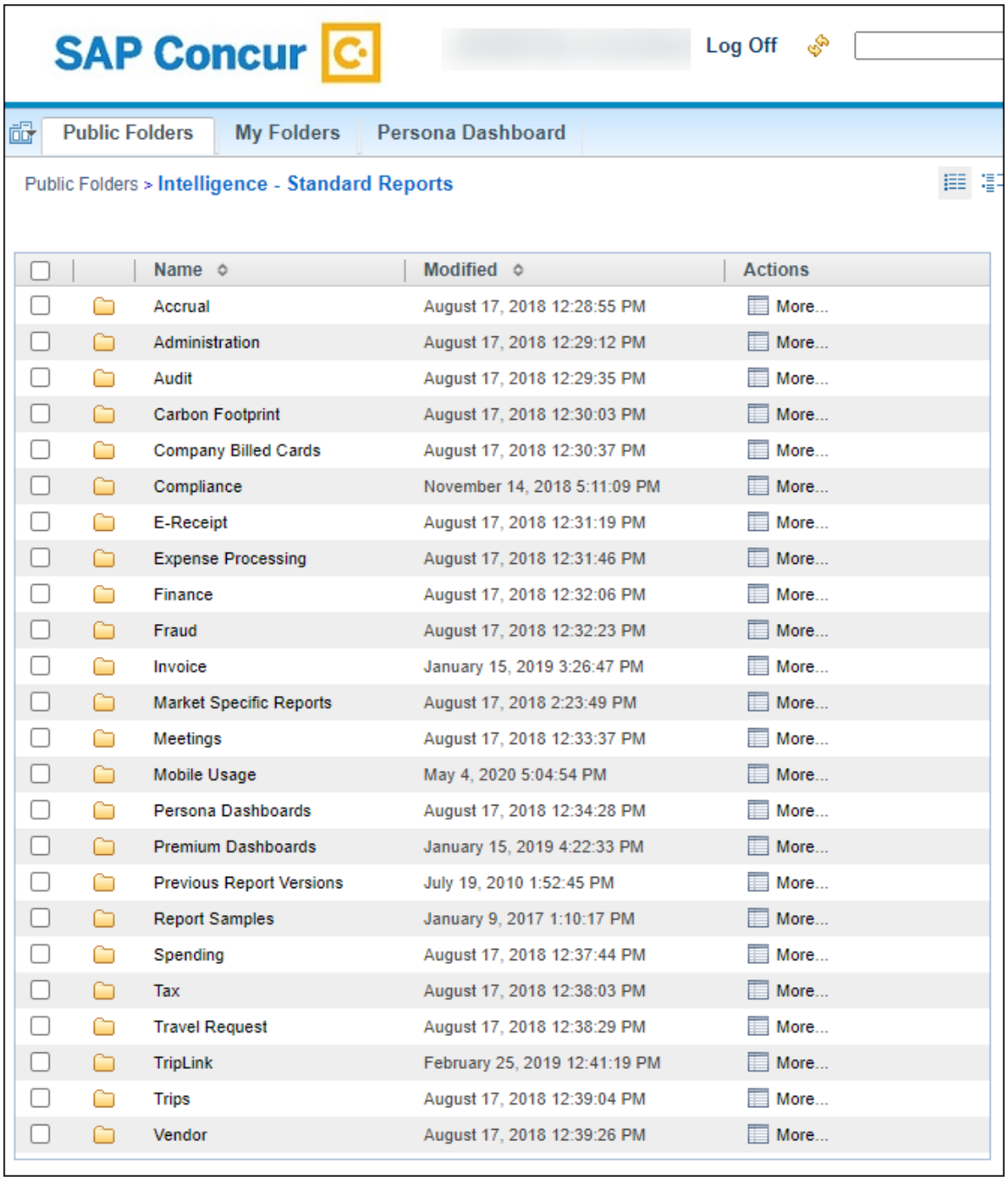
When you click one of the folders on the **Public Folders** tab, such as the **Analysis – Standard Reports** or **Intelligence – Standard Reports** folder, the contents of the folder are displayed on the page.



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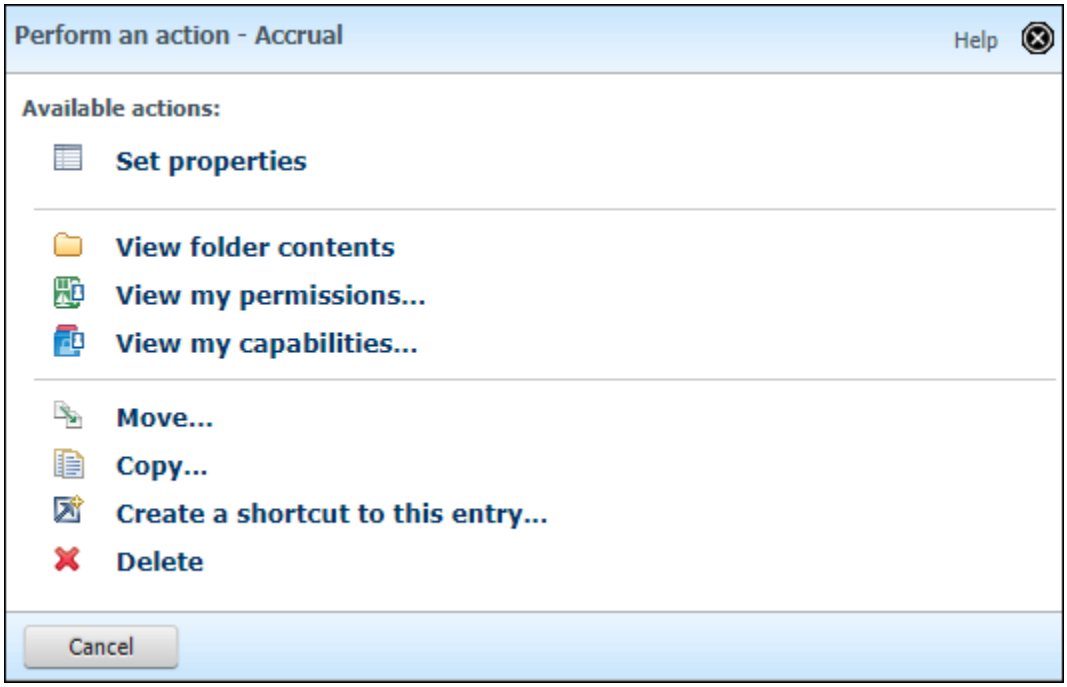
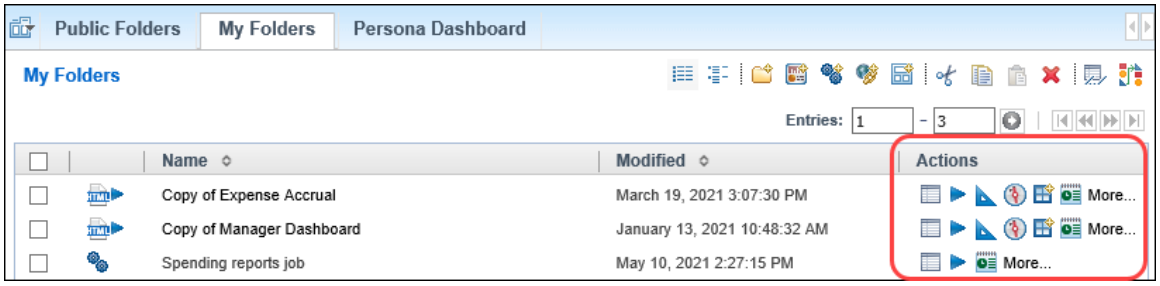
For folders, the **Actions** column contains the **More** link for managing folders.

Clicking the **More** link opens the **Perform and action** page for the folder.



For reports, the **Actions** column contains a number of icons for managing and running individual reports, including the **Set Properties** icon and **More** link, as well as icons for viewing output versions, running the report, opening the report in Report Studio, opening the report with Cognos Workspace, creating a report view, and scheduling the report.



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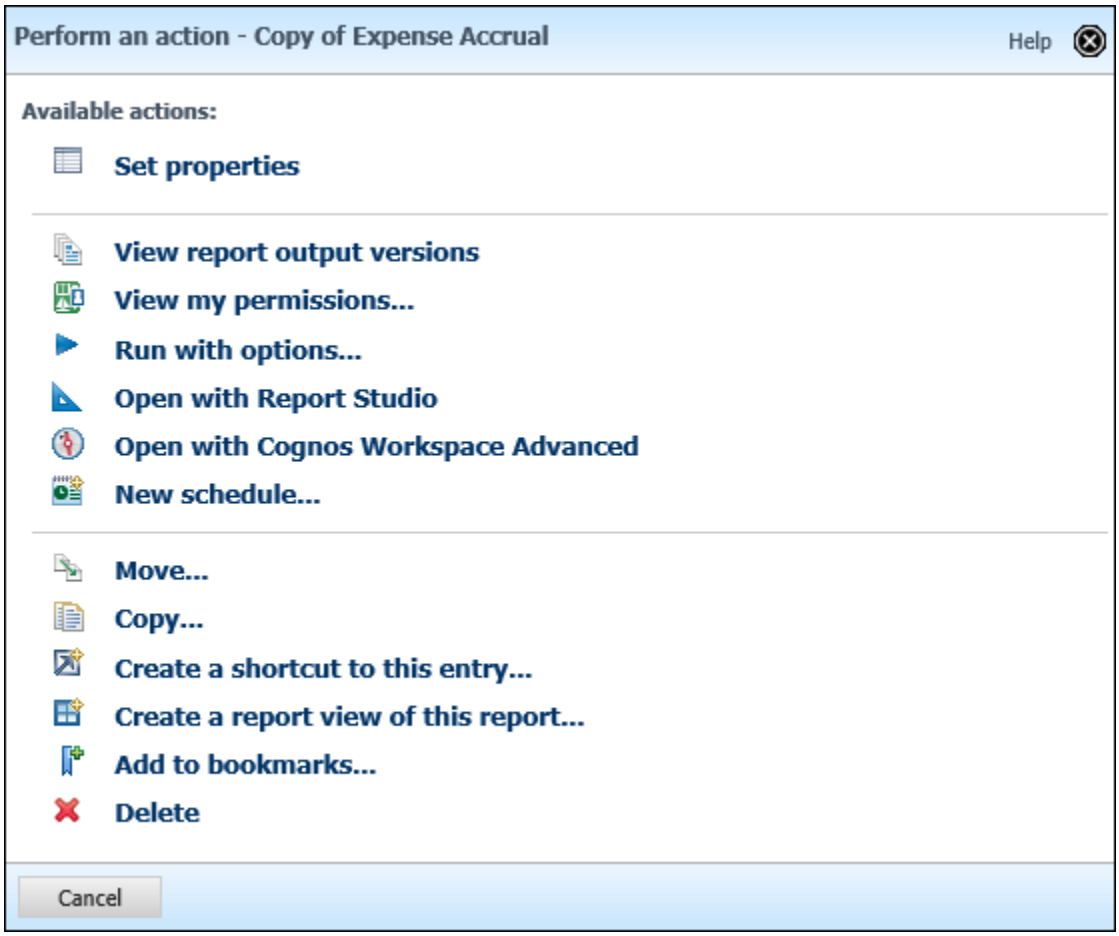
Example of the **Perform an action** page for a report:



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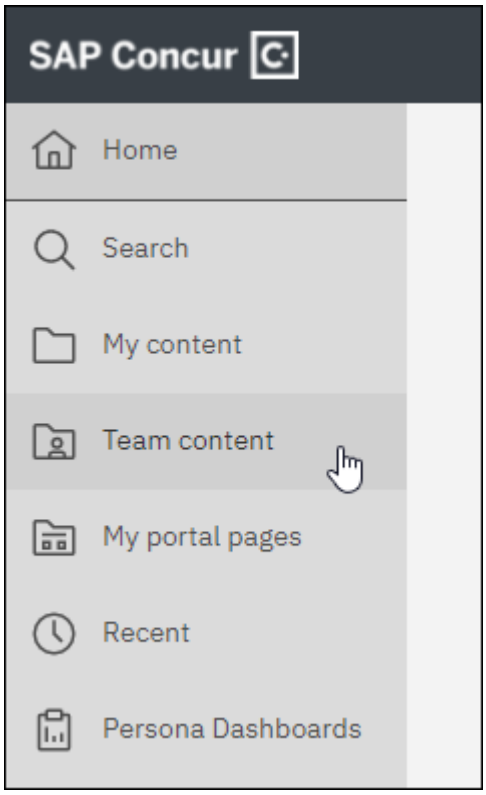
Cognos 11 UI

You can access the Team content feature from the left navigation pane.



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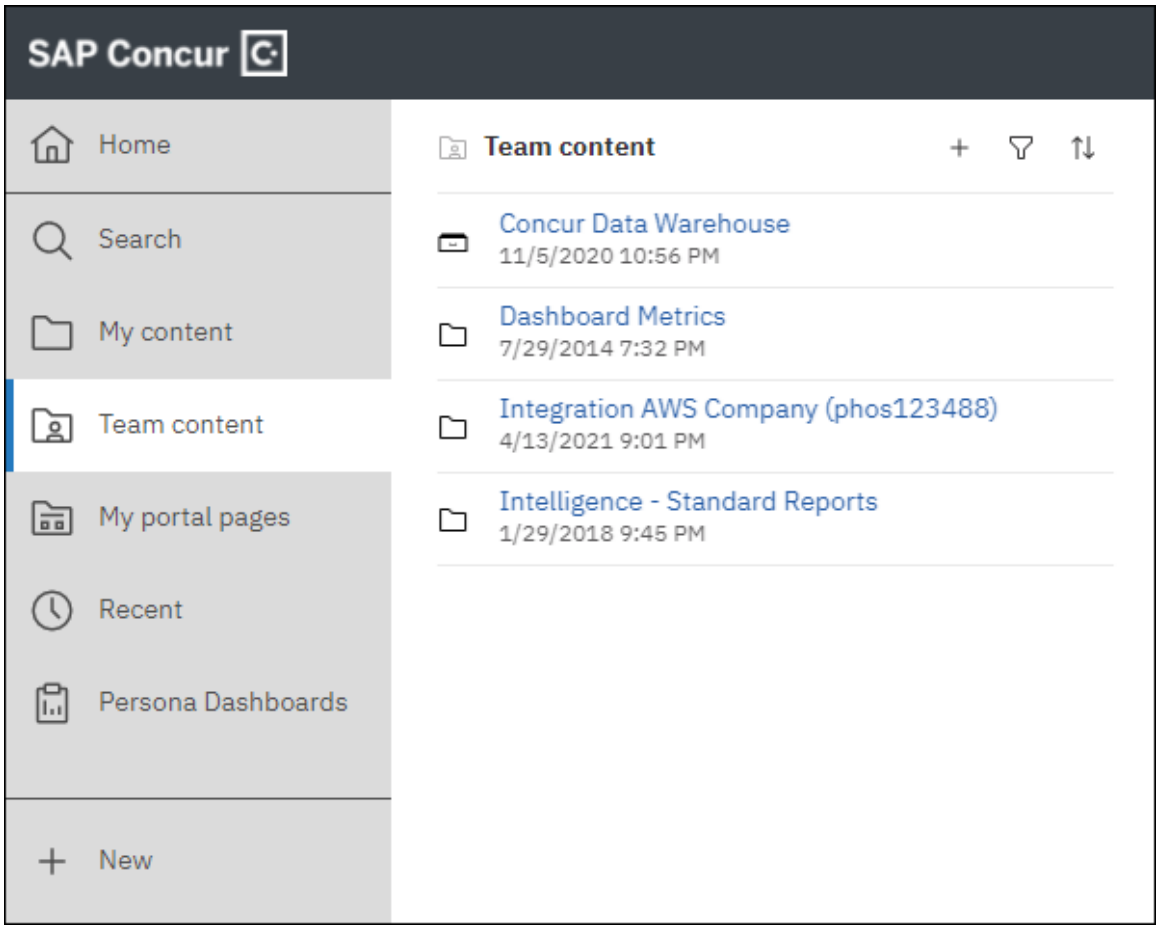
When you click Team content, the contents of the **Team content** folder are displayed to the right of the left navigation pane.



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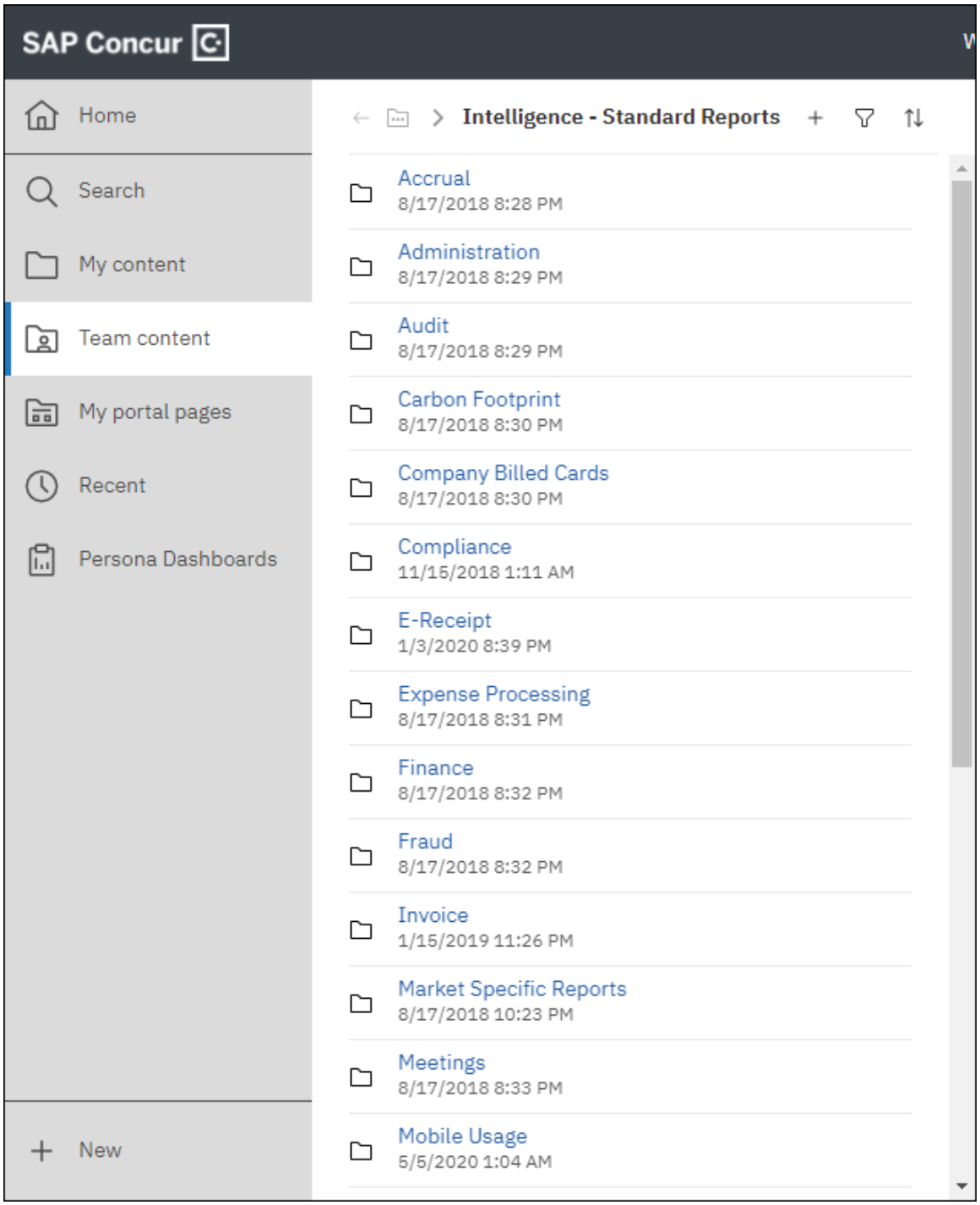
When you click one of the folders in the **Team content** list, such as the **Analysis – Standard Reports** or **Intelligence – Standard Reports** folder, the contents of the folder are displayed to the right of the left navigation pane.



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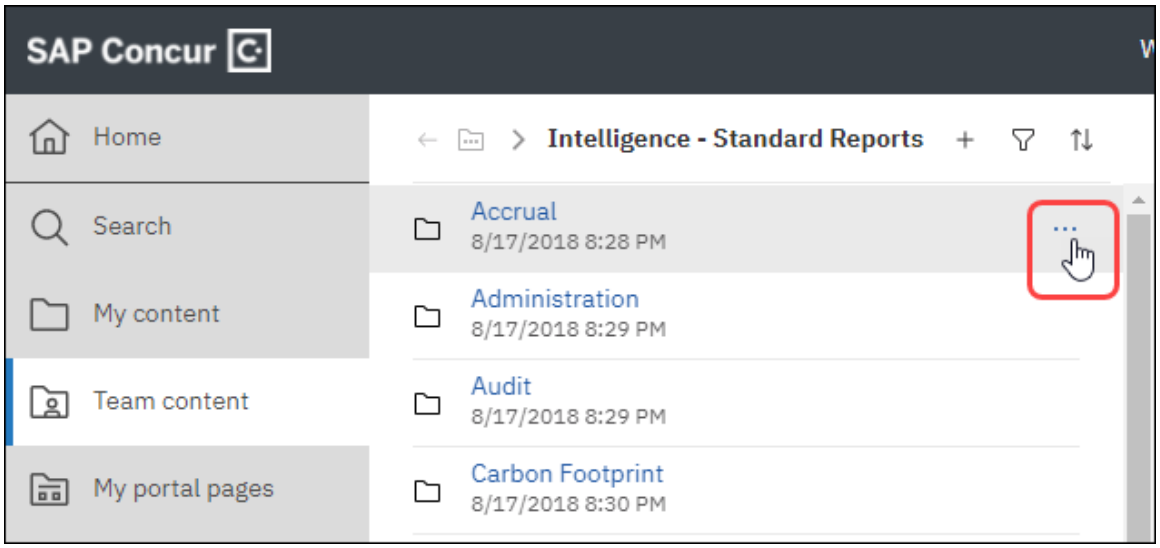
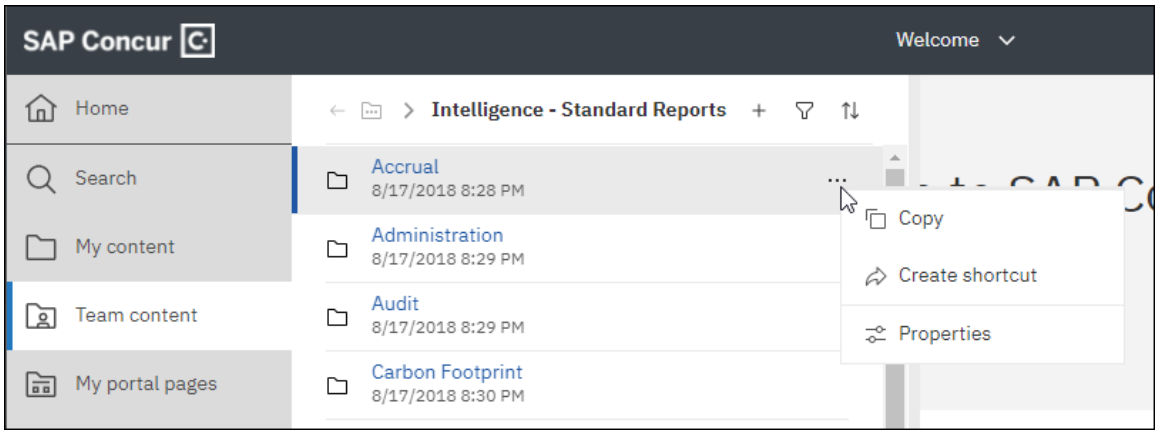
The folders, reports, and dashboards available in the **Analysis – Standard Reports** and **Intelligence – Standard Reports** folders in Cognos 10 are the same folders, reports, and dashboards available in Cognos 11. No changes were made to these folders, reports, or dashboards with the Cognos version 11 update.

The options for managing individual folders and reports are available on the **More** menu. To view the **More** icon, [•••], place your pointer over the individual folder or report.



Click the **More** icon, [•••], to open the **More** menu.

Example of the **More** menu for a folder:



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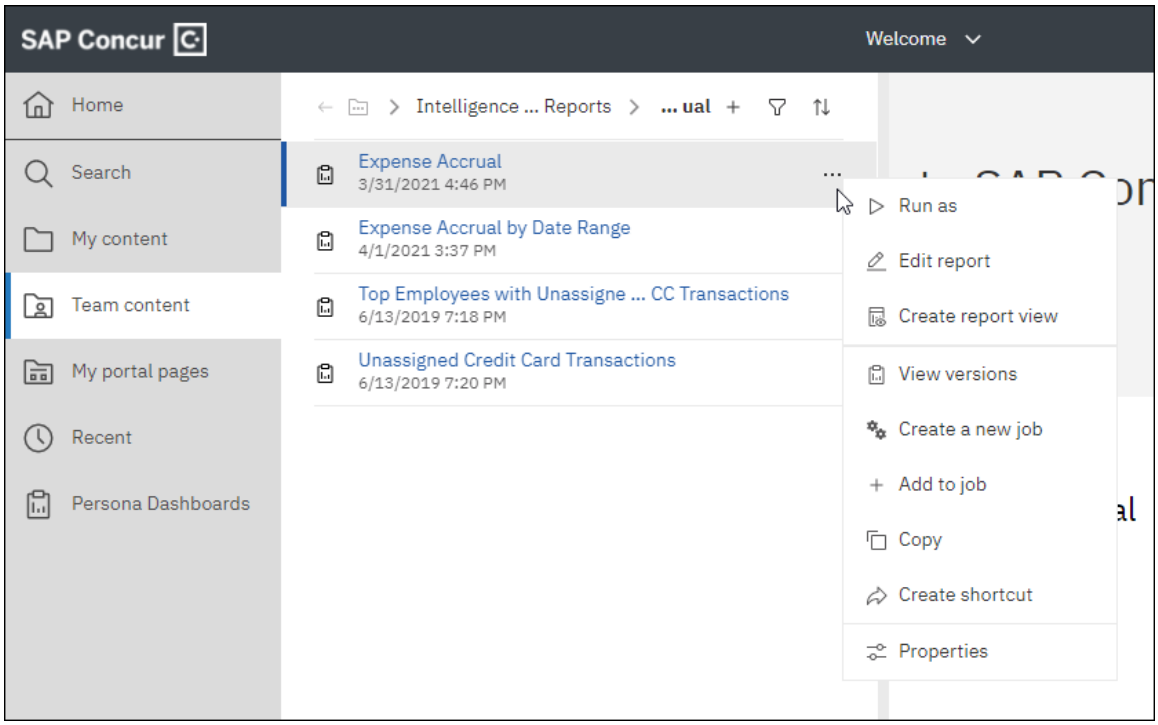
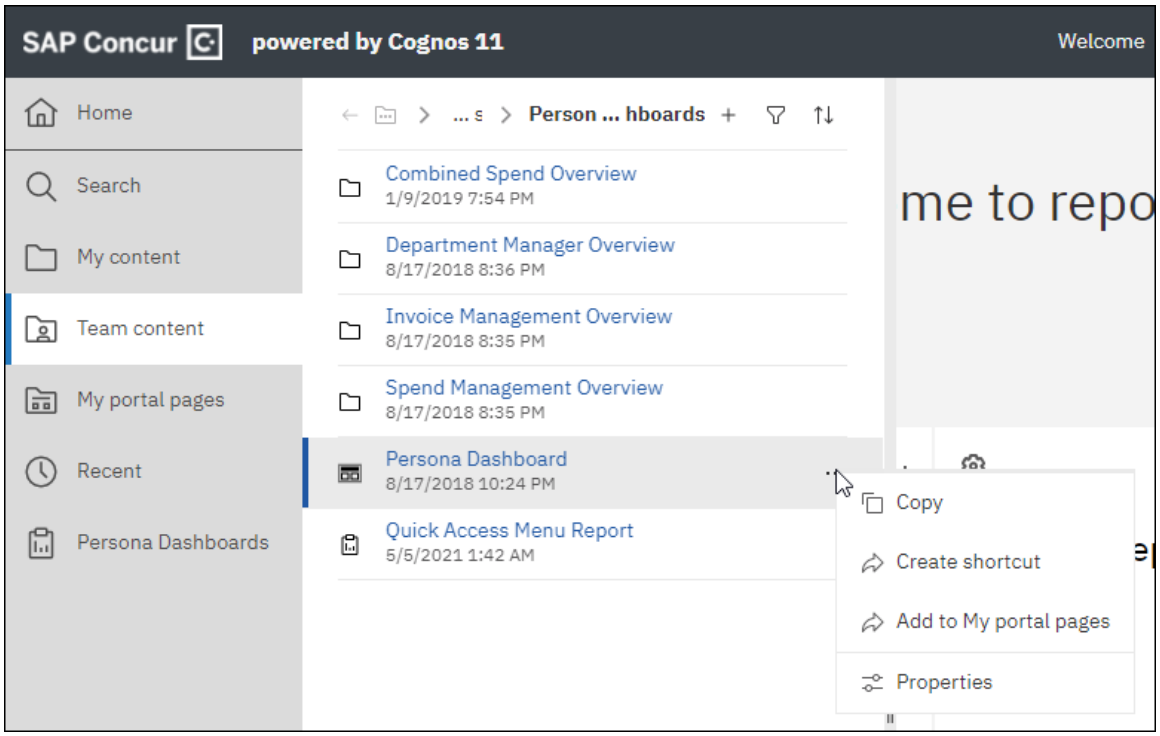
Example of the **More** menu for a report:



Example of the **More** menu for a dashboard:



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Section 7: Persona Dashboards (Formerly Persona Dashboard)

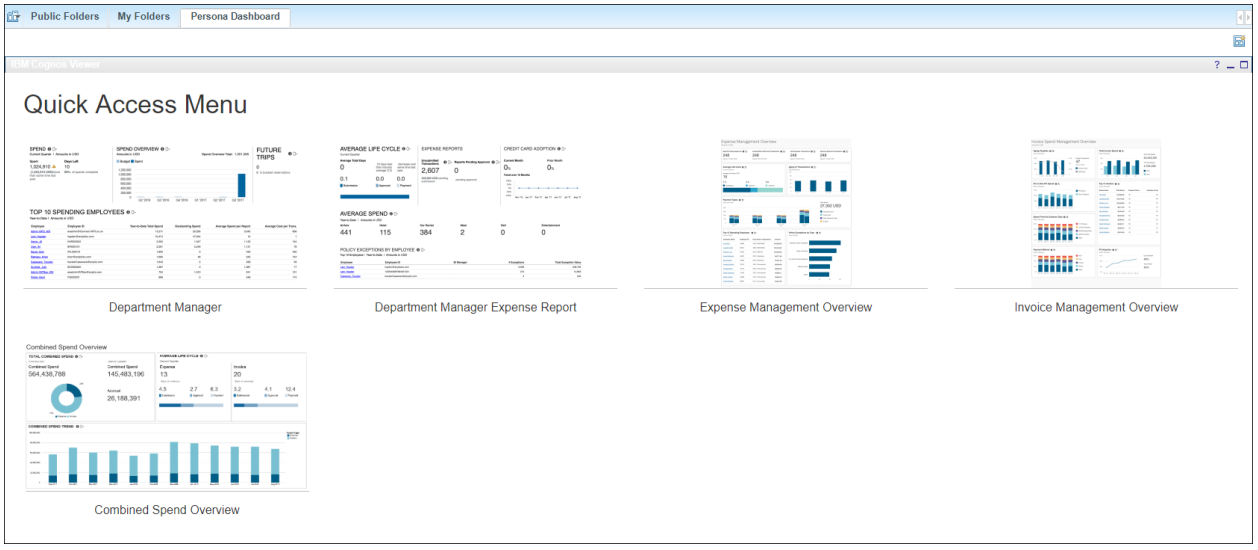
The Persona Dashboards are only available in Cognos if you have Intelligence or are assigned the Cognos Professional Author role for Analysis. Persona Dashboards are not available in Analysis unless you are assigned the Cognos Professional Author role. The **Persona Dashboard** icon appears by default in the left navigation pane for all BI Managers.

In this section, you can see that the Persona Dashboards remain the same between Cognos 10 and Cognos 11, only the way you access the Persona Dashboards has changed.

Cognos 10 UI

In Cognos 10, the Persona Dashboards are accessed by clicking the **Persona Dashboard** tab or navigating to the Persona Dashboards from within the Intelligence – Standard Reports folder (**Public Folders > Intelligence – Standard Reports > Persona Dashboards**).

Clicking the **Persona Dashboard** tab opens the **Quick Access Menu** page for the Persona Dashboards.



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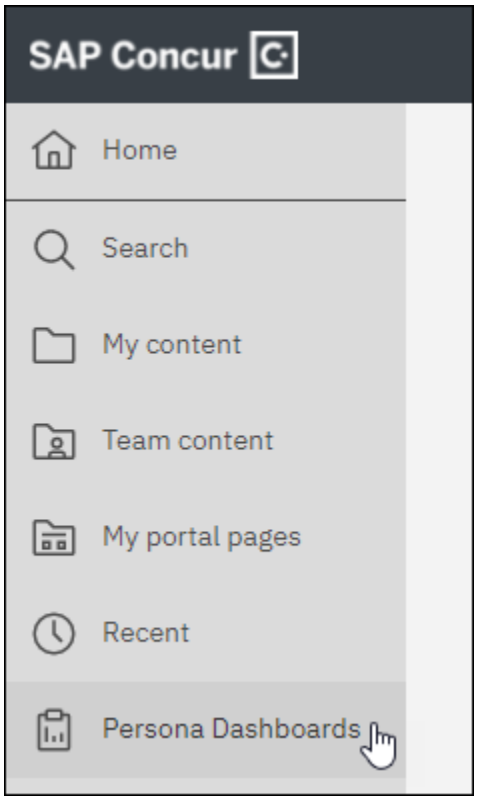
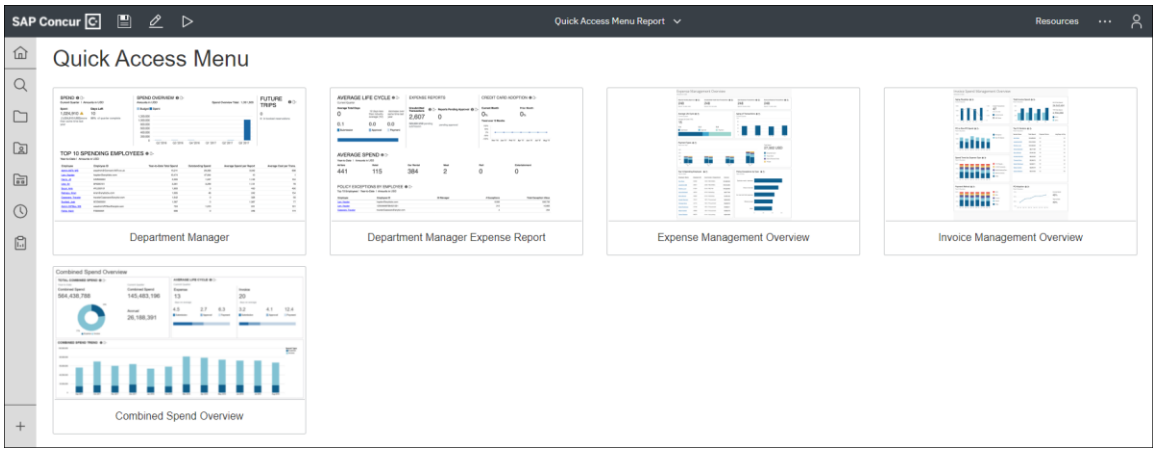
Cognos 11 UI

In Cognos 11, you can access the Persona Dashboards by clicking the **Persona Dashboards** icon, , on the left navigation page or navigating to the Persona Dashboards from within the Intelligence – Standard Reports folder (**Team content > Intelligence – Standard Reports > Persona Dashboards**).



Clicking the **Persona Dashboards** icon, , on the left navigation page opens the **Quick Access Menu** page for the Persona Dashboards.



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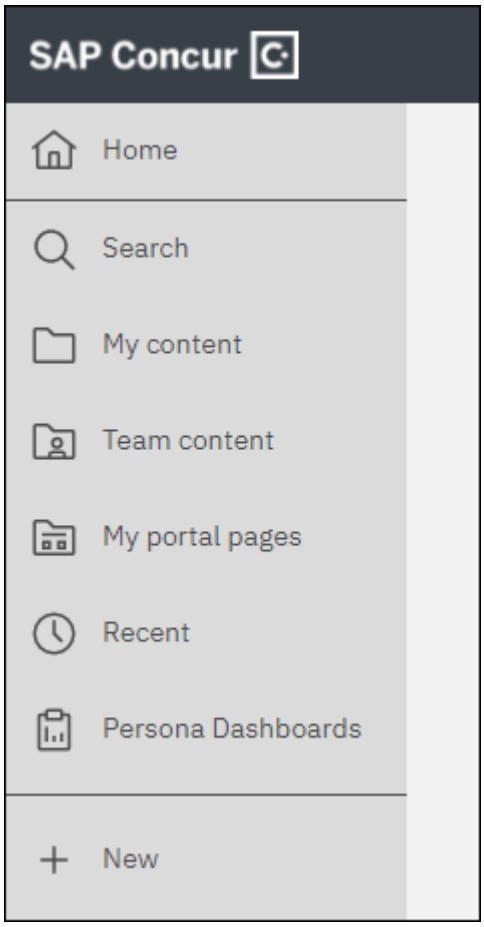
Section 8: Navigation

With the Cognos version 11 update, the feature, folder, report, and dashboard navigation now provides a more streamlined user experience, including a linked navigation folder path.

Left Navigation Bar

Most of the navigation in Cognos 11 starts from the left navigation bar.

NOTE: The width of your browser window and what you currently have displayed in the main view determines whether the left navigation pane displays the icons along with the icon name or whether the pane displays the icons only.



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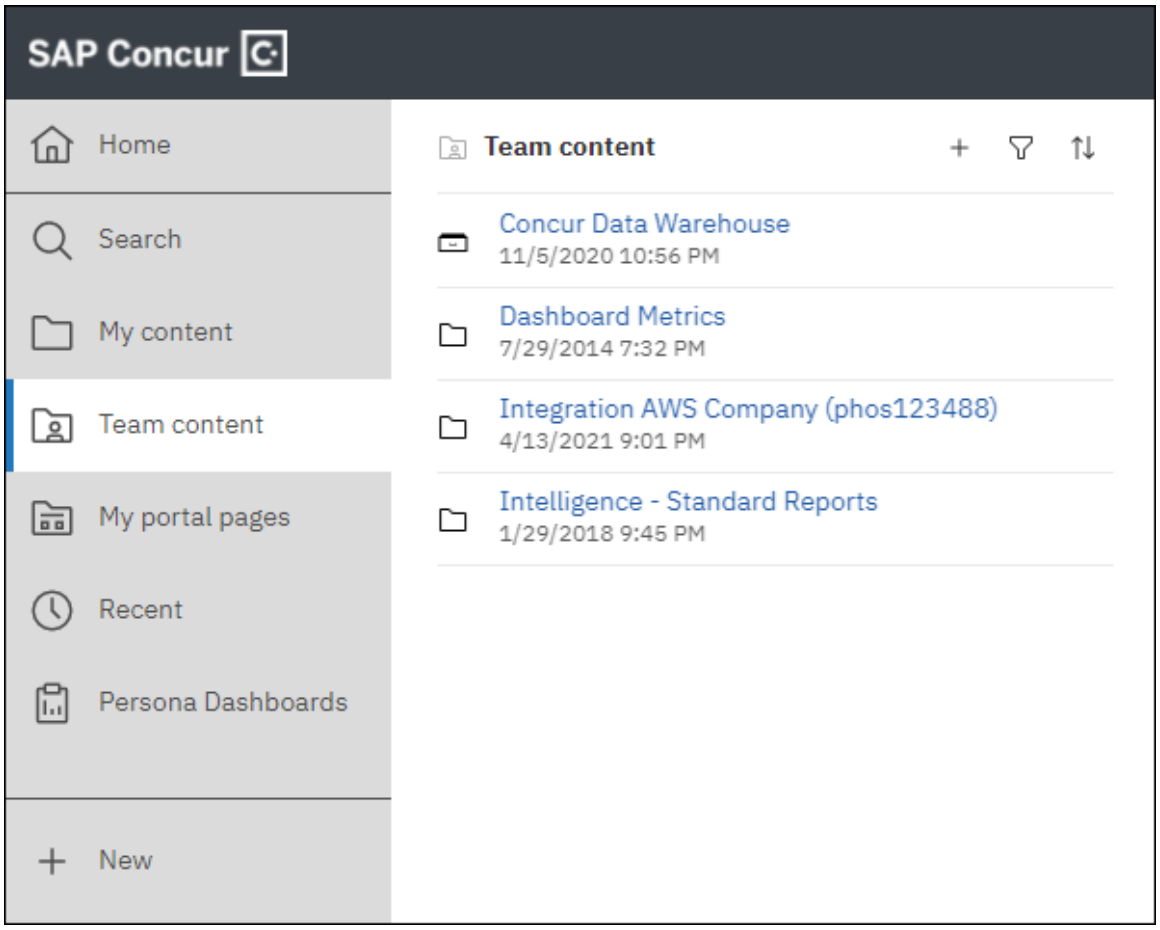
Navigating Folders

Some features on the left navigation bar open a folder list, such as My content and Team content.

When you click **My content** or **Team content**, the **My content** or **Team content** folder list opens to the right of the left navigation pane.

In this example, the **Team content** folder list is opened:



The name of the top-level folder, **Team content**, is displayed at the top of the folder list.

To open a folder in the list, click the folder you want to open. The contents of the folder are now listed to the right of the left navigation bar.

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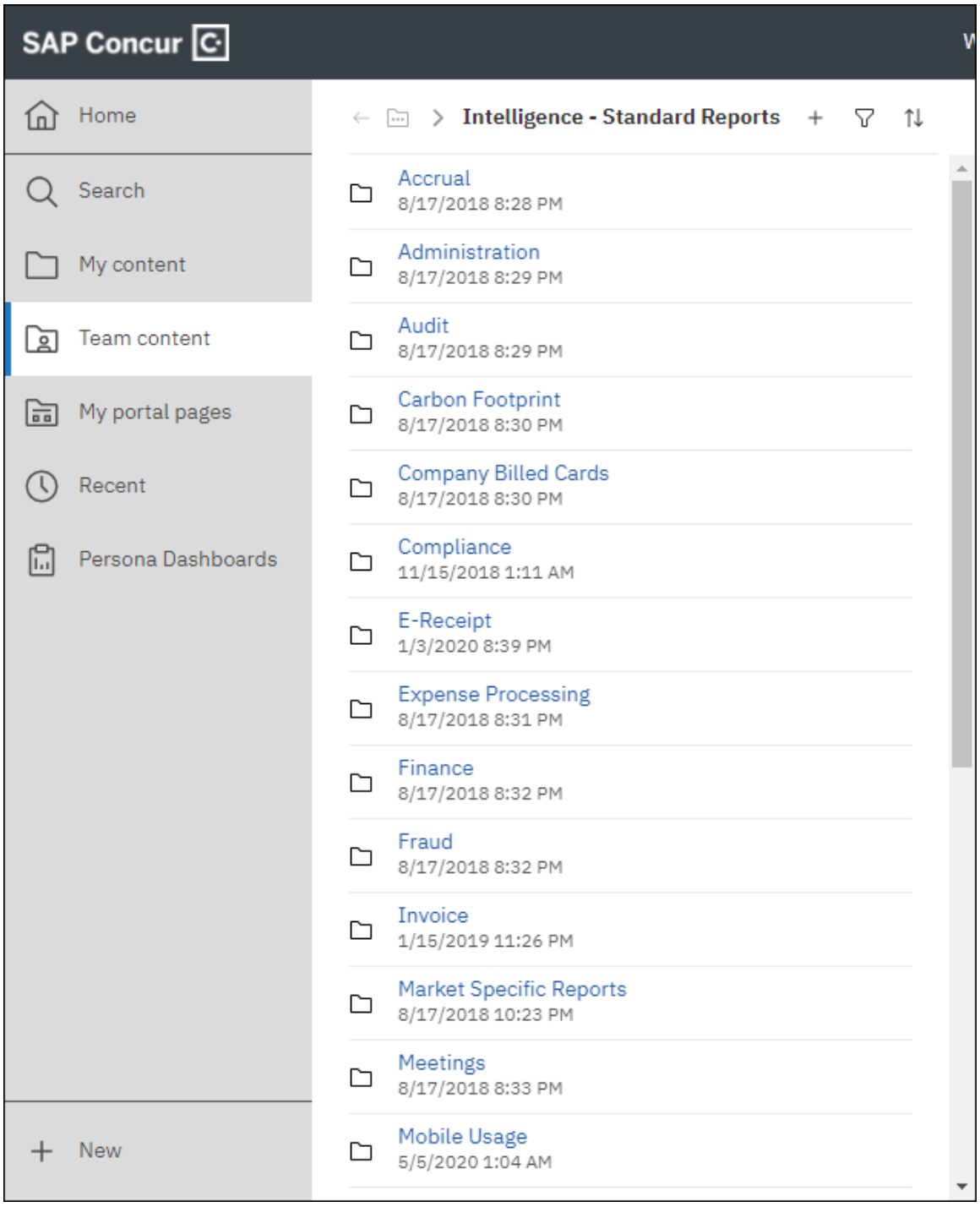
In this example the **Intelligence – Standard Reports** folder is opened.



At the top of the folder list, the name of the folder you opened along with the folder path are displayed. You can click any folder in the path to navigate directly to that folder.

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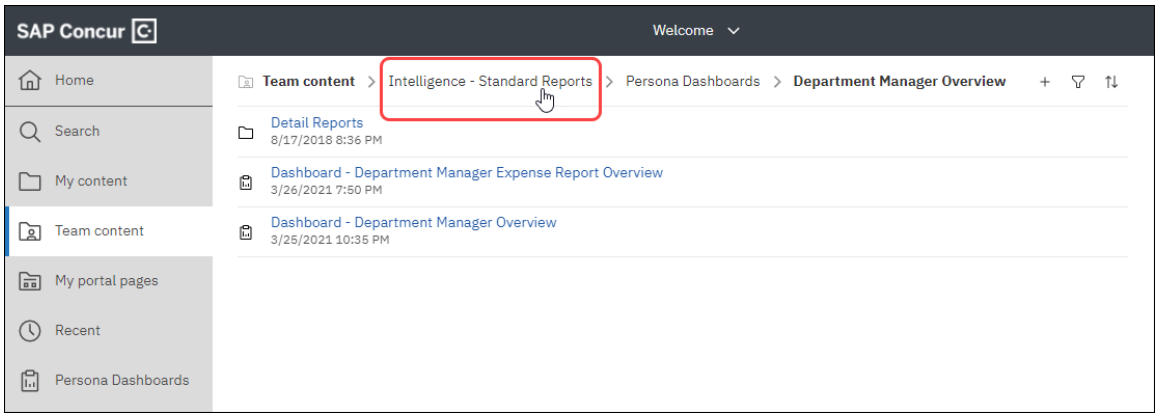
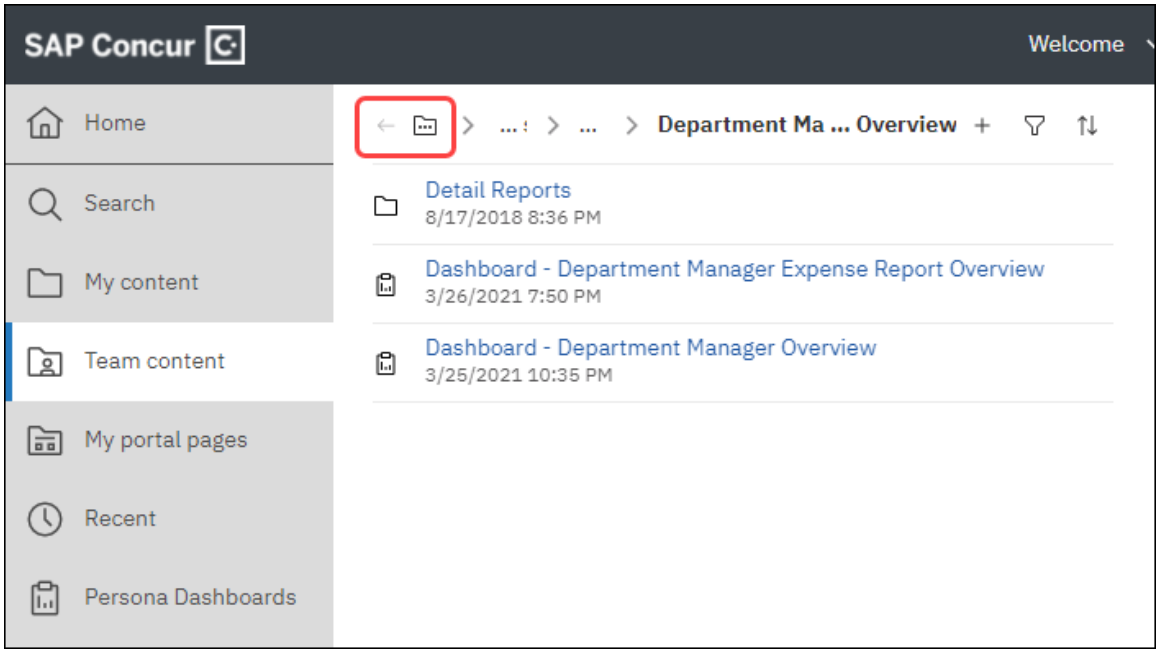
In this example, the **Department Manager Overview** folder is opened. If you click *Intelligence – Standard Reports* in the folder path, the **Intelligence – Standard Reports** folder will open.



If the full folder path cannot be displayed, the **Previous** icon, , and the **Collapsed items** icon, , are displayed to the left of the folder path.



Clicking the **Previous** icon, , will navigate you back one folder level. So, if you clicked **Team content** in the left navigation pane and then clicked the **Intelligence – Standard Reports** folder, when you click the **Previous** icon, , you are returned to the **Team content** folder.

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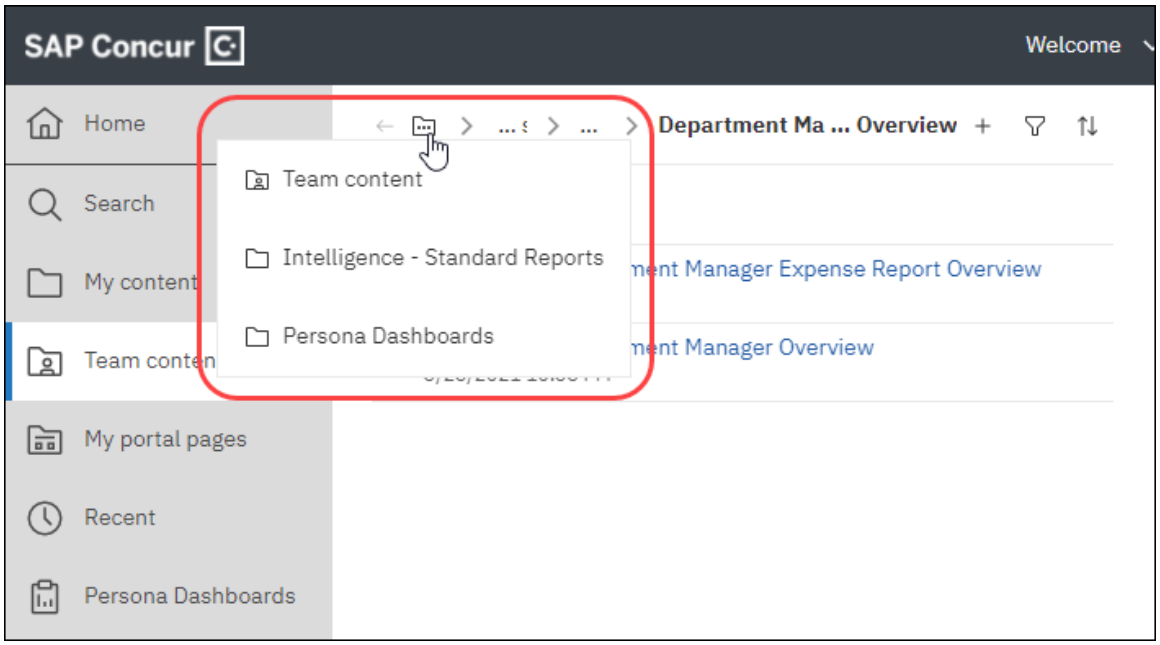
Clicking the **Collapsed Items** icon, , displays the current folder hierarchy. You can navigate to any point in this folder hierarchy by clicking the applicable folder in the hierarchy.



When you navigate to a specific folder in Cognos 11, Cognos 11 will retain your place in the folder hierarchy for the current Cognos session even when you leave the current view.

For example, during your Cognos session, if you are viewing reports in the **Accrual** folder under **Intelligence – Standard Reports** in Team content and then open My content, when you return to Team content, the **Accrual** folder will open.

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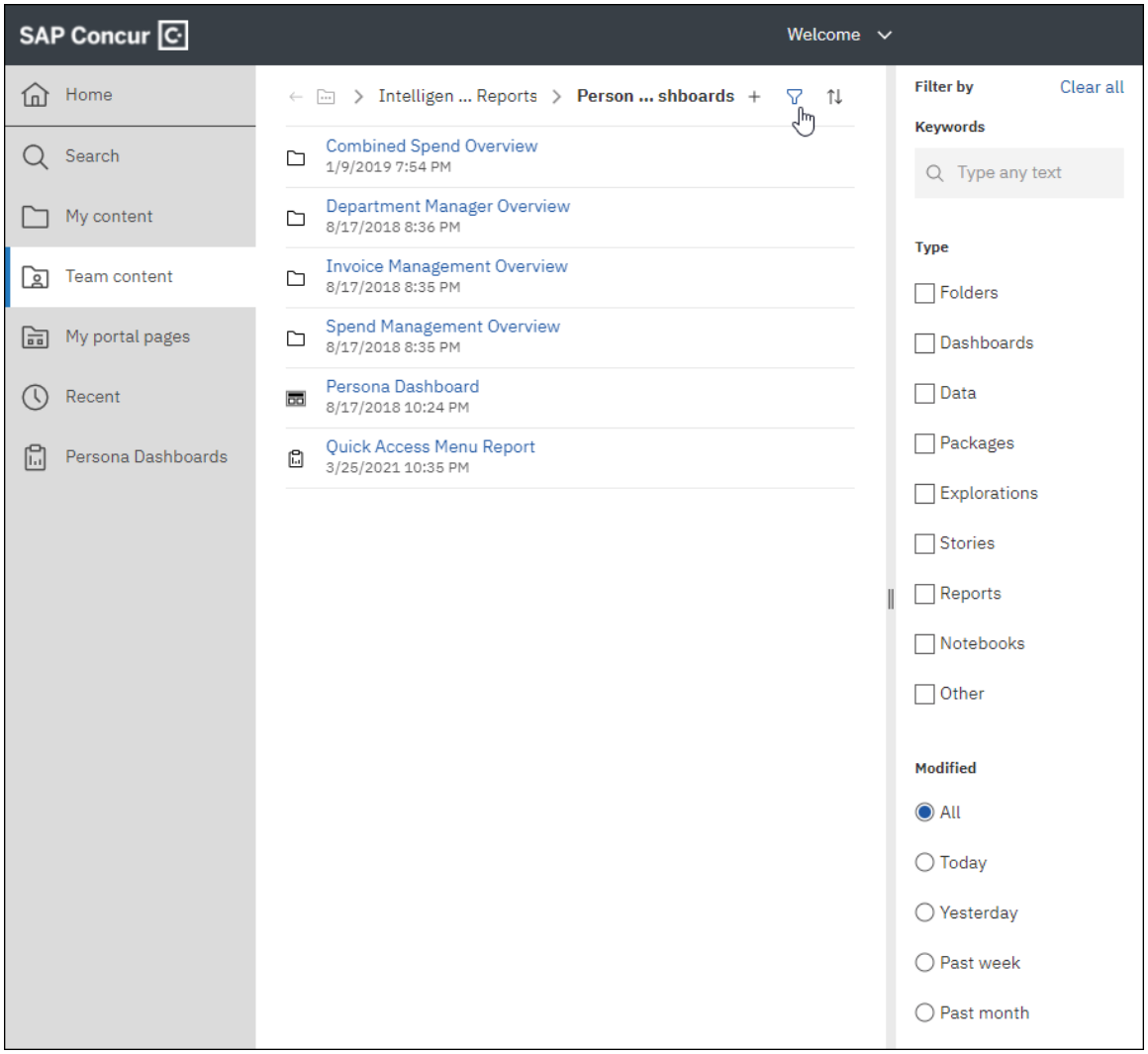
Filter By and Sort Panes

To the right of the folder name and path is the **Filter by** icon, , and the **Sort** icon, . Clicking the **Filter by** icon, , opens the **Filter by** pane to the right of the folder list.



As you enter your filter criteria, the contents of the folder are automatically filtered.

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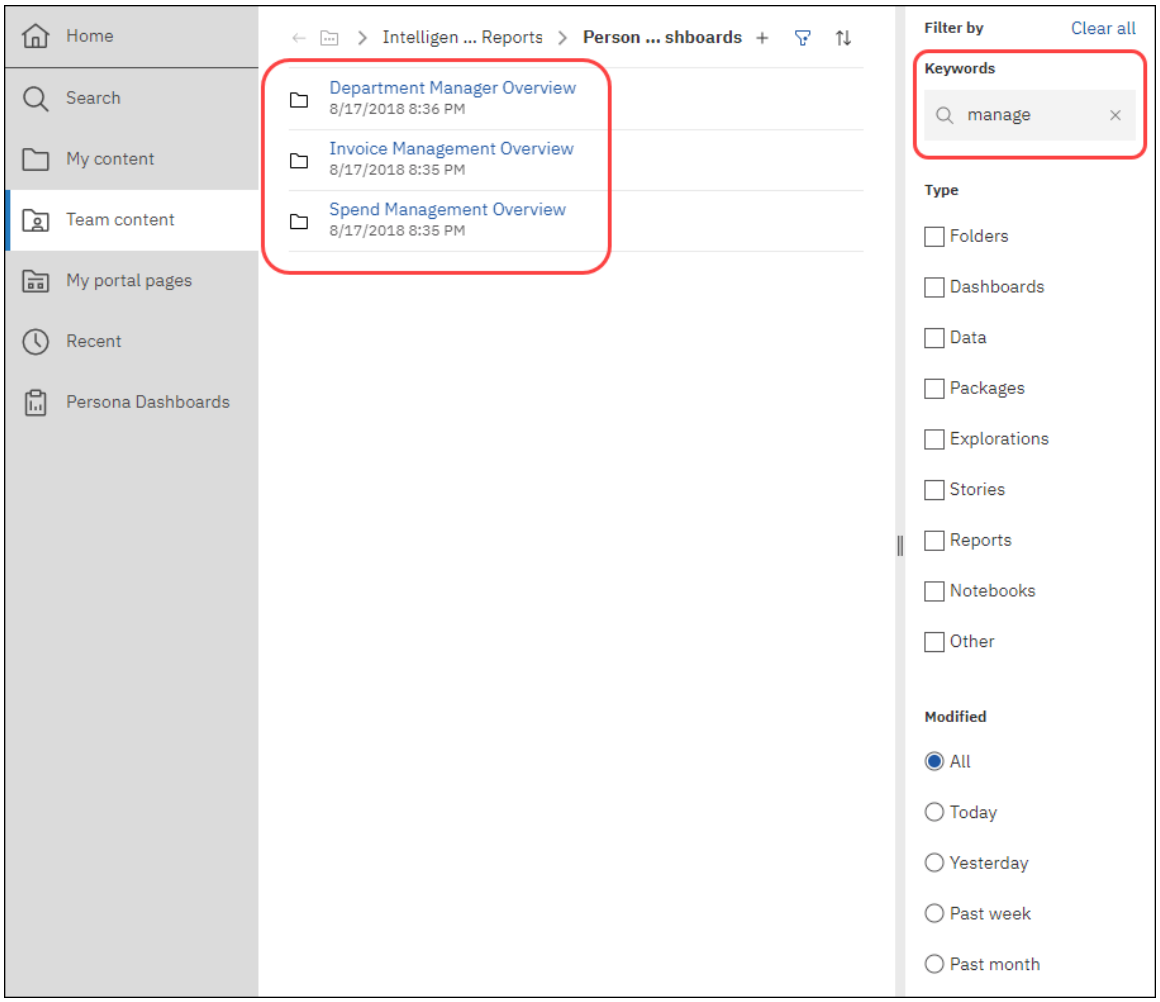
For example, the **Persona Dashboards** folder is open. Entering *manage* in the **Keywords** field filters the list to only display the items containing *manage* in the name. In this example, only three folders in the list contain *manage* in their name.



The filter criteria will be applied to any folder you navigate to. For example, if you navigate to the previous folder, the filter criteria will also be applied to that folder. The filter criteria are retained for the current Cognos session until your clear or edit the filter criteria, even if you close the **Filter by** pane.

A dot on the **Filter by** icon, , indicates that a filter is currently being applied.

To close the **Filter by** pane, click the **Filter by** icon, , again.

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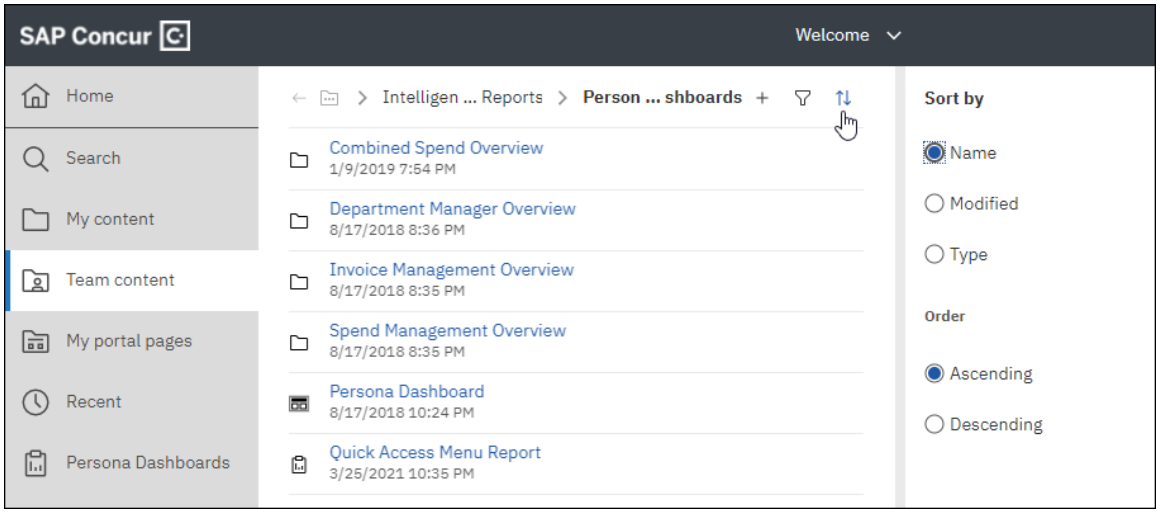
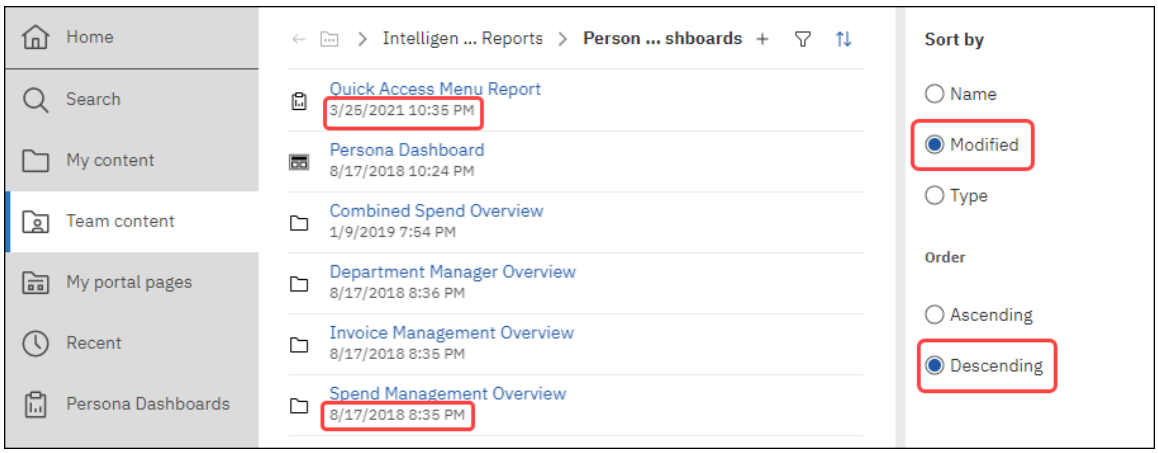
Clicking the **Sort** icon, ⇅, opens the **Sort by** pane to the right of the folder list.



By default, the **Name** and **Ascending** options are selected in the **Sort by** pane.

As you select the sort options, the contents of the folder are automatically sorted.

For example, the **Persona Dashboards** folder is open. Selecting the **Modified** and **Descending** options sorts the contents of the folder by the last modified date in descending order, with the most recently modified item at the top of the list and the item with the oldest last modified date at the bottom of the list.



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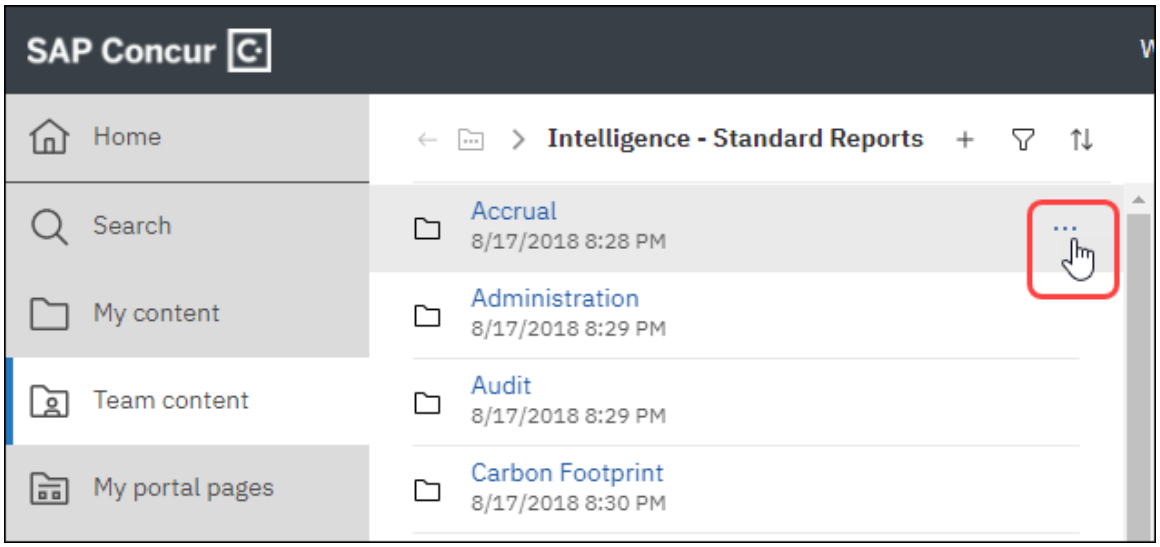
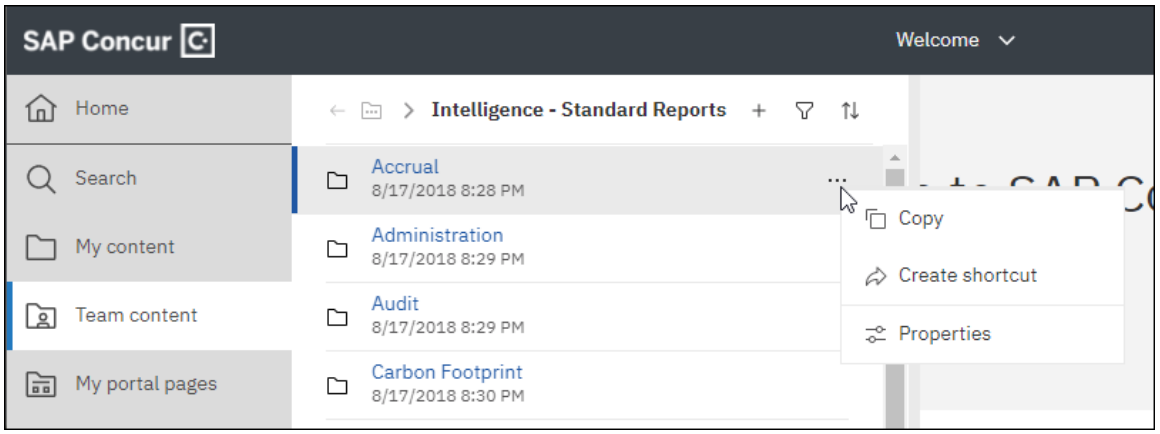
More Menu

For folders, reports, dashboards, and jobs in a folder list, the **More** menu is available. The options for managing individual folders, reports, dashboards, and jobs are available on the **More** menu. To open the **More** menu, place your pointer over the individual folder, report, or job in the folder list to display the **More** icon, ••• .



Click the **More** icon, ••• , to open the **More** menu.

Example of the **More** menu for a folder in Team content:



Recently Viewed List on the Top Navigation Bar

The recently viewed list on the top navigation bar provides a list of the recently viewed pages, reports, jobs, or dashboards for the current Cognos session. You can use the list to quickly navigate back to something you recently viewed.

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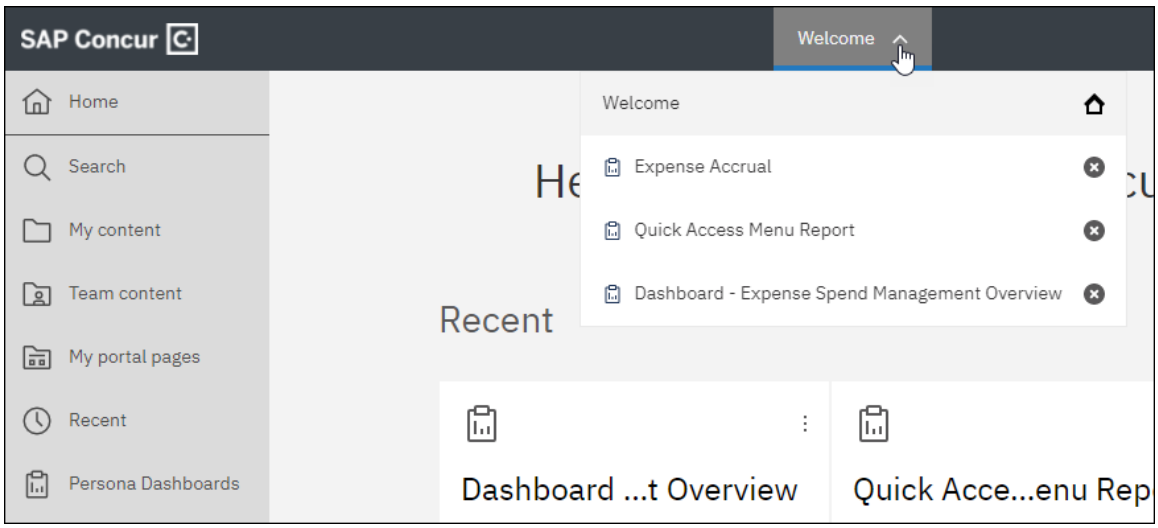
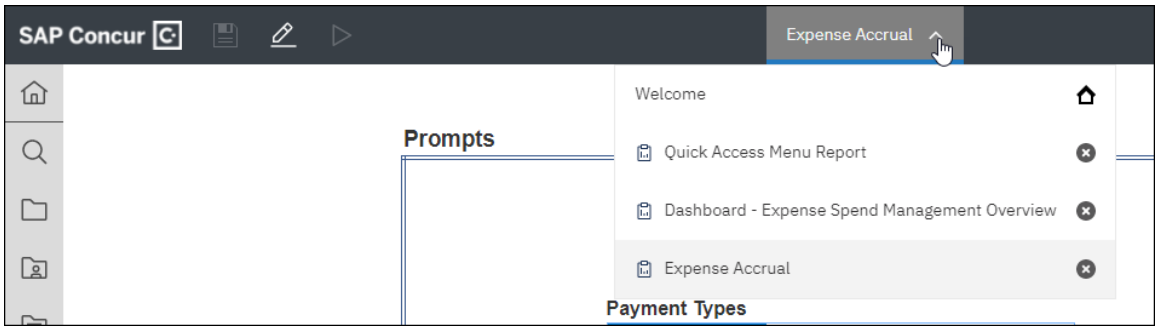
The name of the recently viewed list on the top navigation bar displays the name of the page currently viewed. For example, on the default Home page, the list displays *Welcome*, if you are viewing the Expense Accrual report, the list displays *Expense Accrual*.

The recently viewed list on the top navigation bar is cleared after each Cognos session.

Example of the recently viewed list when viewing the default Home page:



Example of the recently viewed list when viewing the Expense Accrual report:



Recent

The **Recently viewed** list is displayed when you click the **Recent** icon, , on the left navigation pane and the **Recent** list displayed on the default Home page, displays the last 20 pages, reports, jobs, and/or dashboards viewed by the user. Unlike the recently viewed list on the top navigation bar, the contents of the **Recently viewed** and **Recent** lists carry over from previous Cognos sessions. The recently viewed list on the top navigation bar is cleared after each Cognos session.

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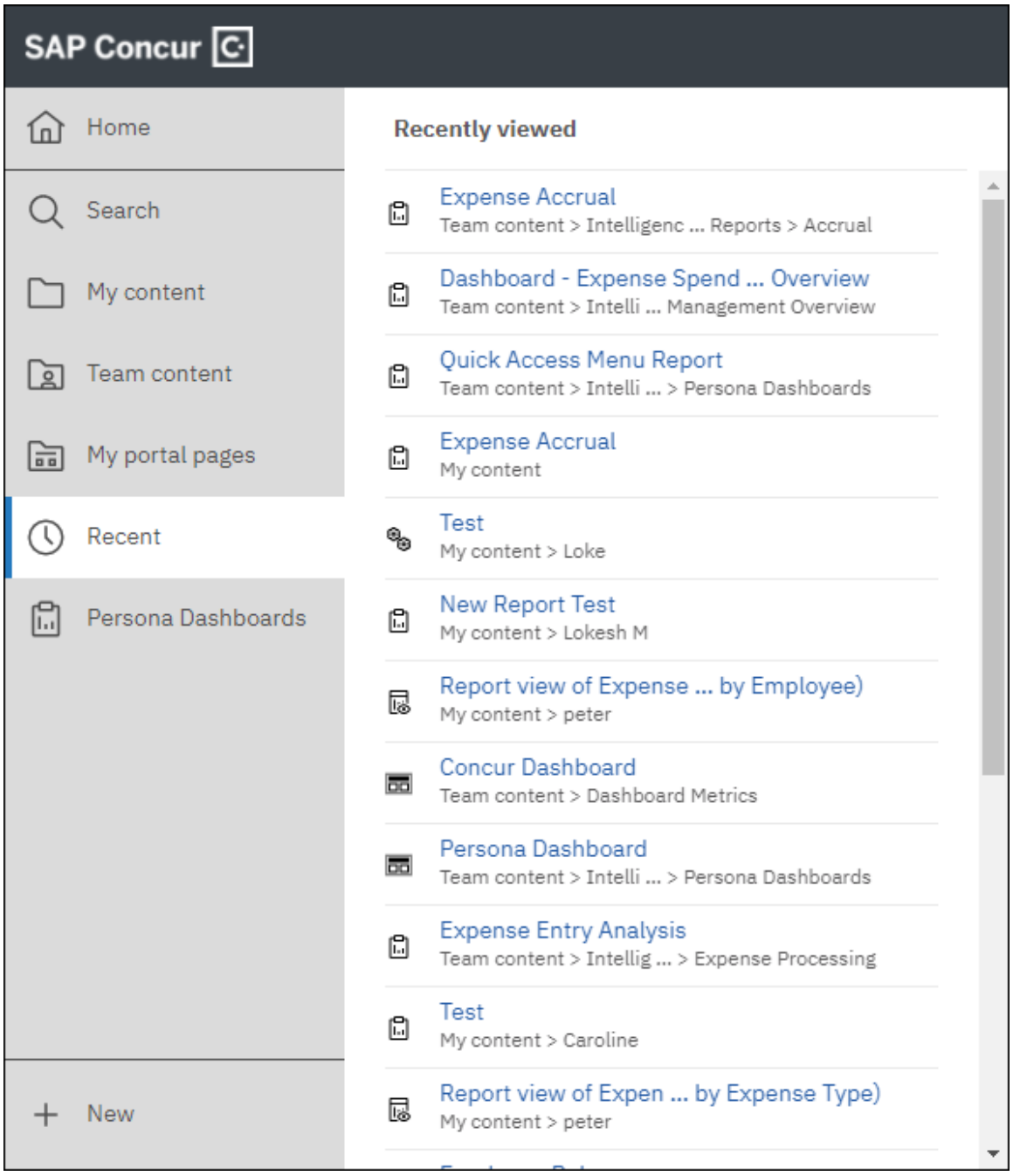
The list of recently viewed pages, reports, dashboards, and/or jobs displayed in the **Recently viewed** list is the same list that is displayed in the **Recent** list on the default Home page. Cognos 11 provides two different ways to access this list.

Example of the **Recently viewed** list:



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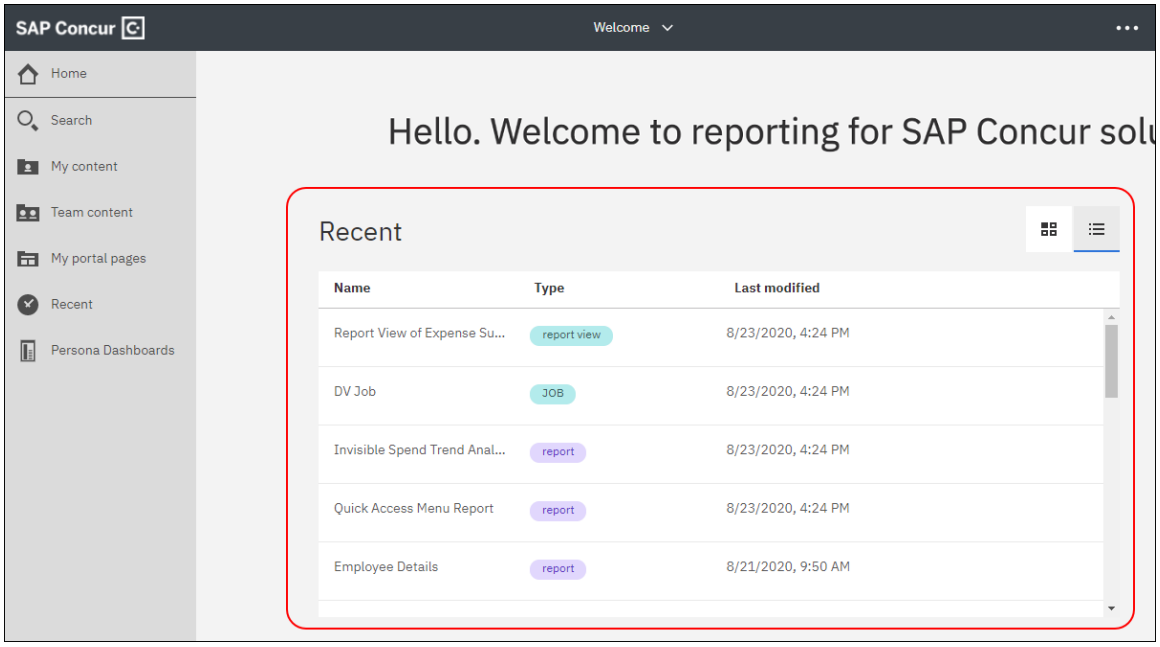
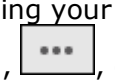
Example of the **Recent** list on the default Home page:



Regardless of whether you are viewing the **Recently viewed** list from the left navigation bar or the **Recent** list on the default Home page, the **More** menu is available for each of the items in the list, just like if you were viewing the items in My content or Team content.

Placing your pointer on the item displays the **More** icon, . Clicking the **More** icon,  , opens the **More** menu for the item.

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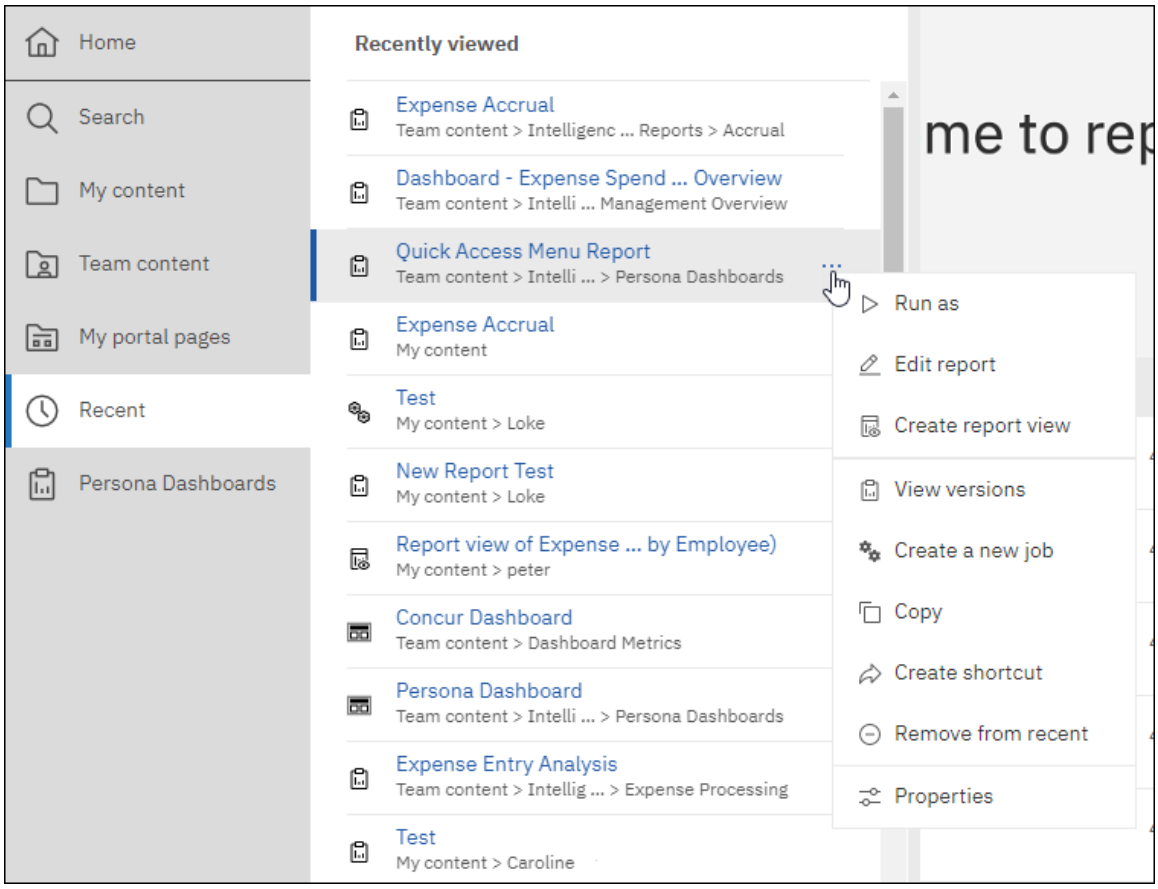
Example of the **More** menu from the **Recently viewed** list:



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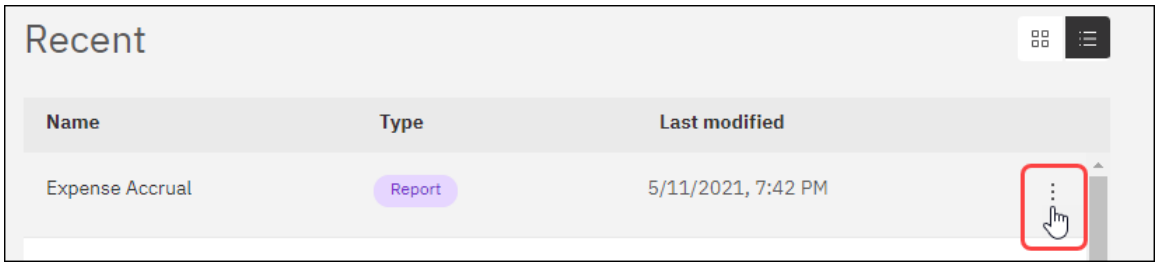
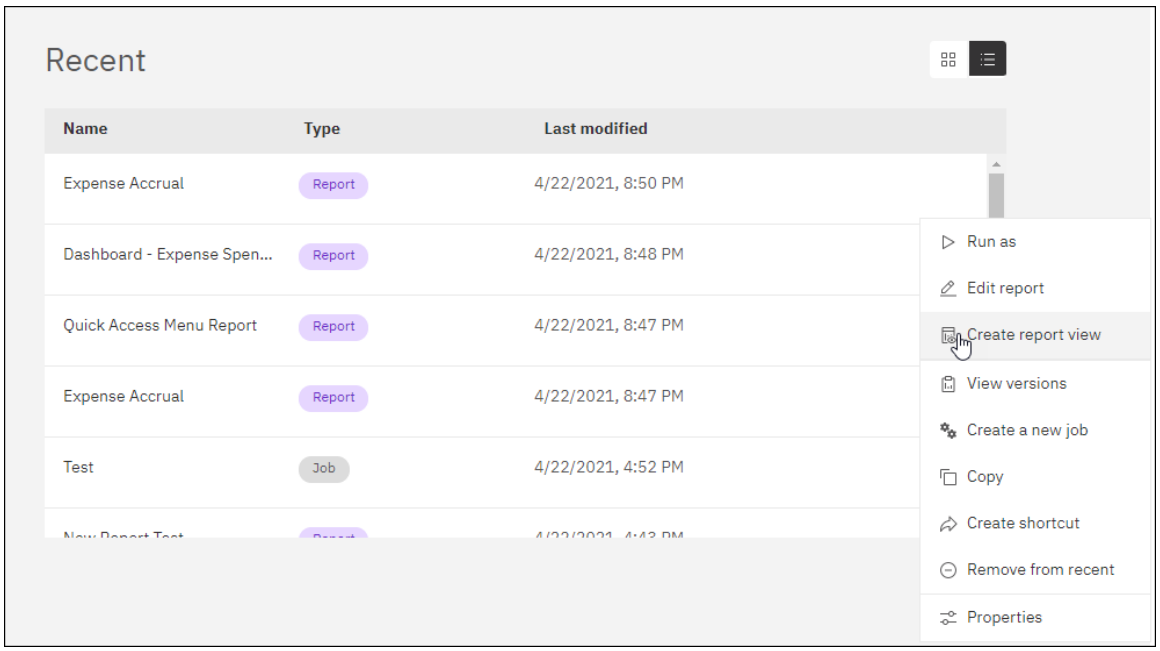
Example of the **More** menu from the **Recent** list on the default Home page:

NOTE: The orientation of the **More** icon, , on the Home page is vertical instead of horizontal.





Section 9: Search

In Cognos 11, you can globally search the **My content** and **Team content** folders for any folder, report, dashboard, or job that you have access to. The search results can be filtered by object type (such as folder, report, or dashboard).

Searches can be saved to help save time when you need to re-run the same search.

In Cognos 11, you can also search the data model.

For more information about searching the data model, refer to the *Report (Formerly Report Studio)* section in this guide.

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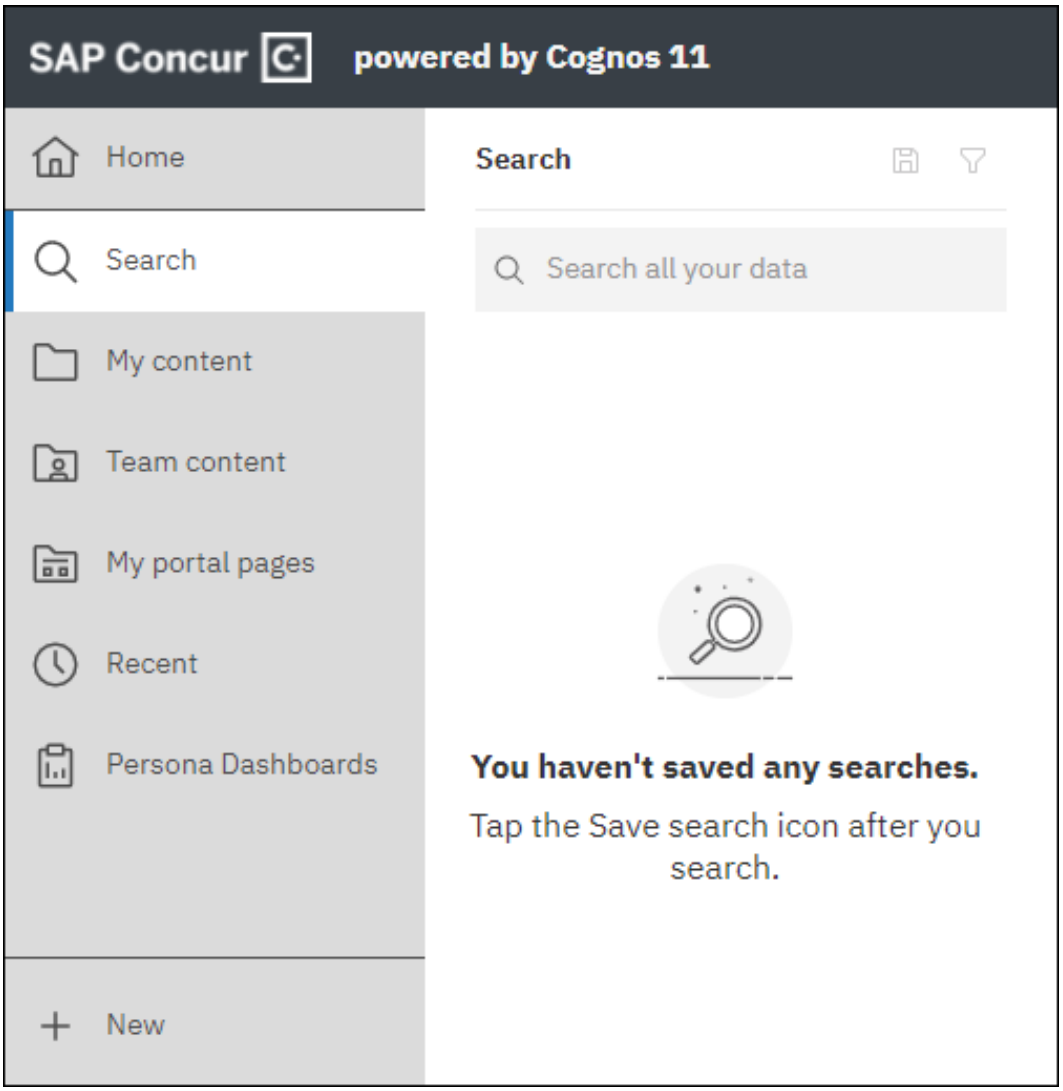
- ***To search the My content and Team content folders:***

1. Click **Search**, , in the left navigation pane.

   The **Search** pane opens to the right of the left navigation pane.



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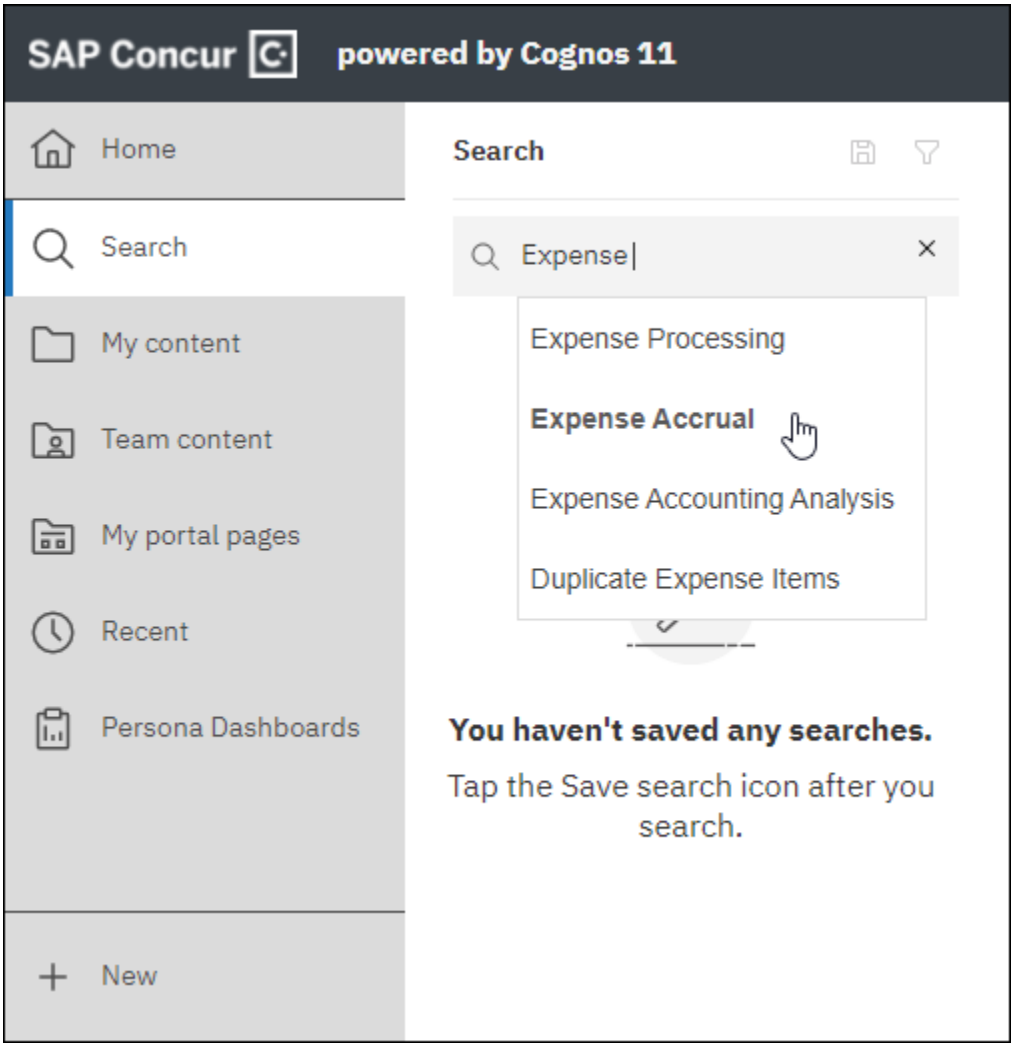
2. Enter the search term(s).

   As you begin typing, search suggestions are listed.



3. Either click one of the search suggestions or press the **Enter** key to run the search.

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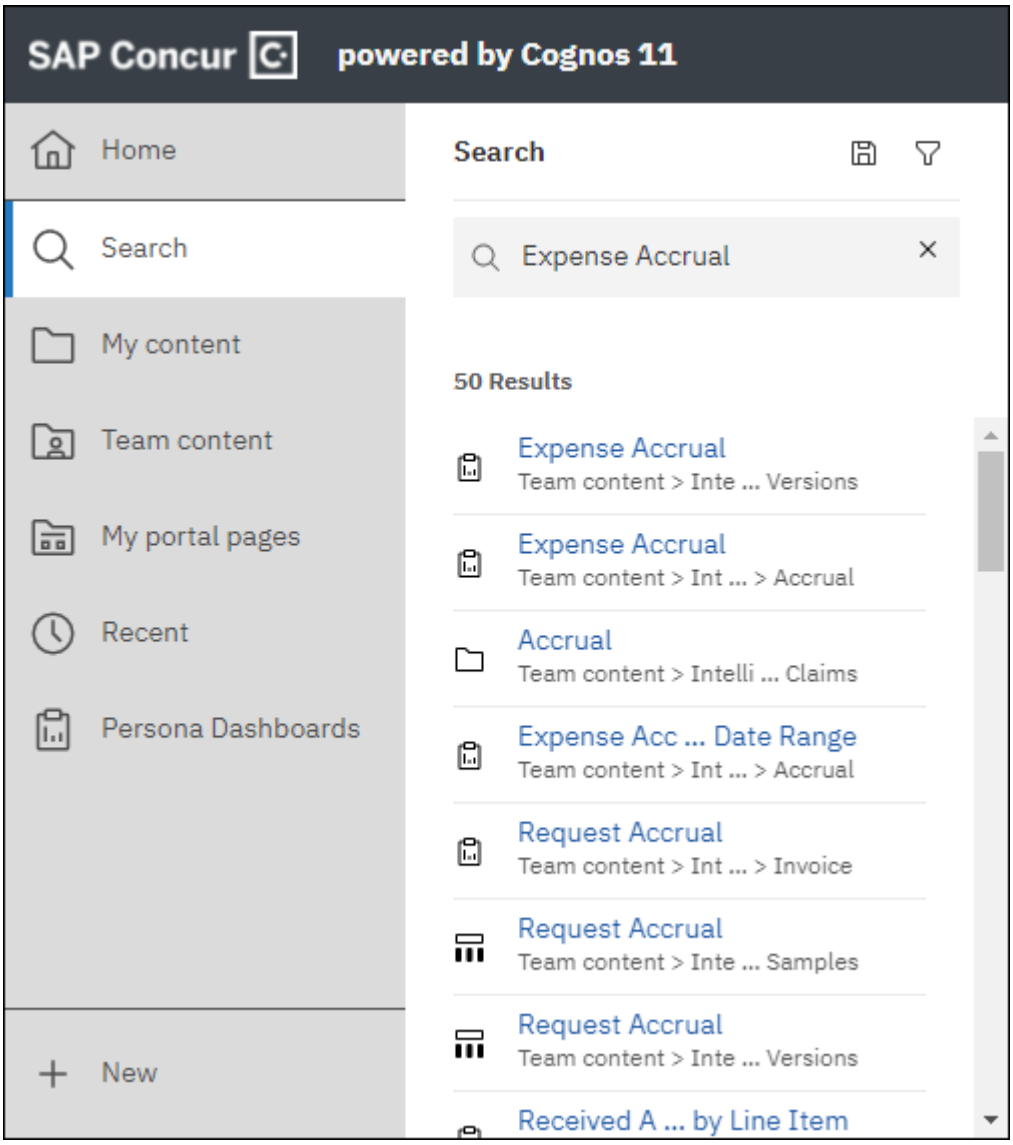
The search results are listed on the **Search** pane. The search results display up to 50 of the top matches in search results.



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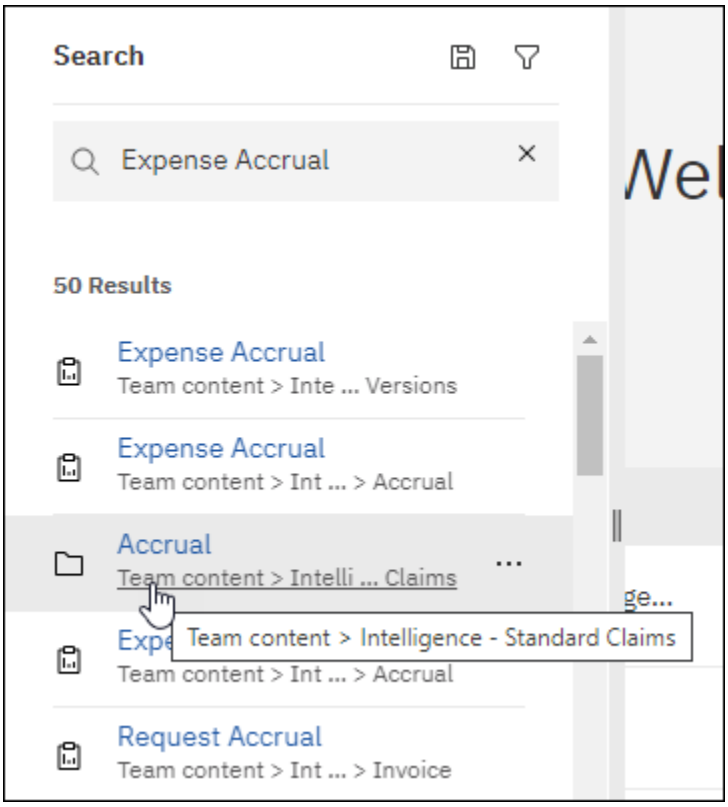
4. To view the full path of an item in the search results, place your pointer over the path below the item's name.



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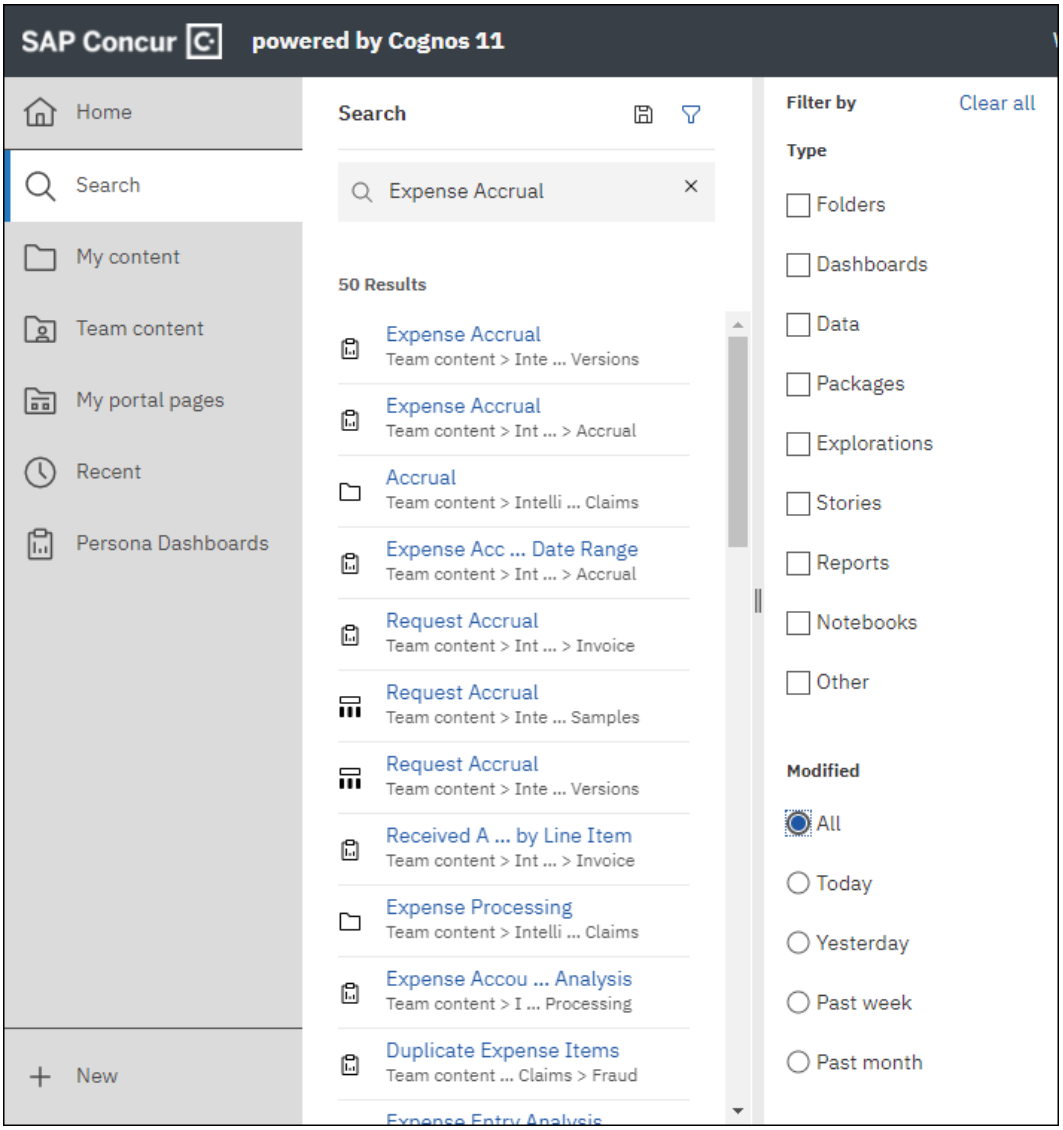
To filter the search results:

1. After running a search, click the filter icon, , at the top of the **Search** pane.
2. Clicking the filter icon, , opens the **Filter by** pane to the right of the **Search** pane.



3. Select the filters you want to apply to the search results.

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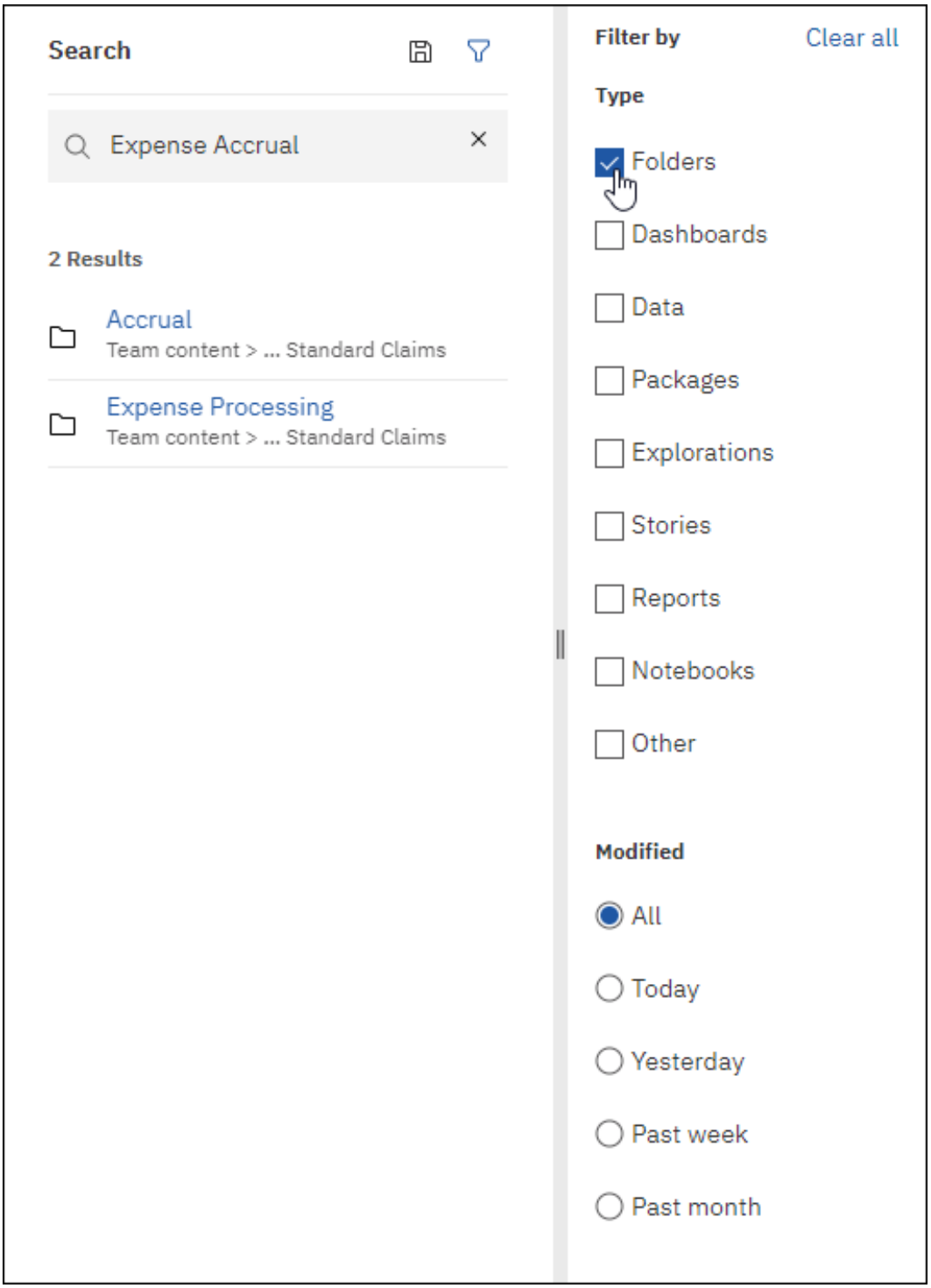
The search results are automatically filtered as you make your selections on the **Filter by** pane.



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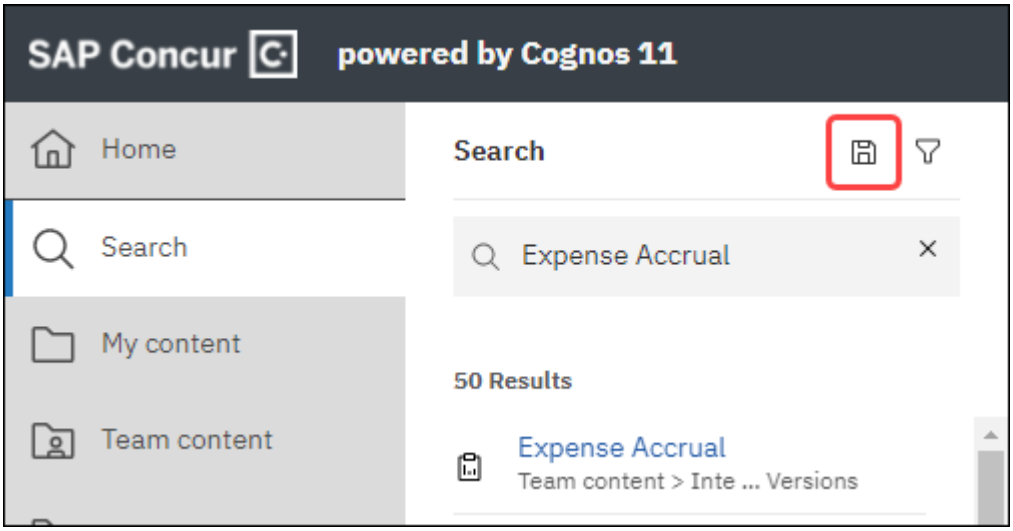
4. To clear your filter selections, click the **Clear all** link at the top of the **Filter by** pane.

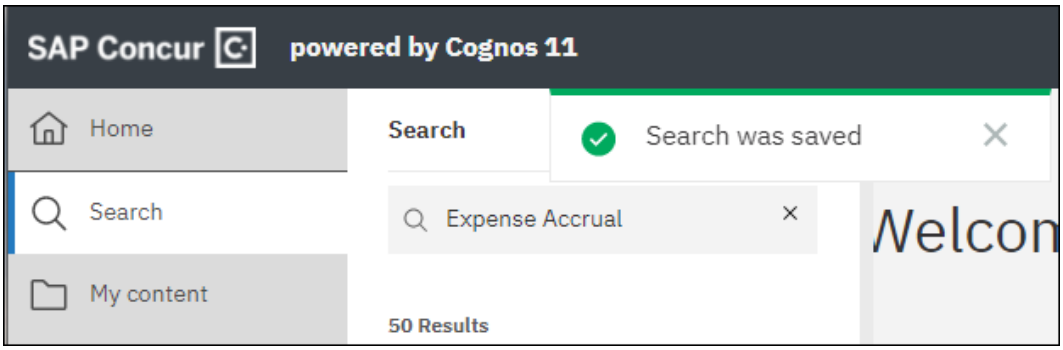
5. To close the **Filter by** pane, click the filter icon, , again.

To save a search:

1. After running a search, click the **Save search** icon, , at the top of the **Search** pane.



2. Clicking the **Save search** icon, , saves the search and the *Search was saved* message appears.



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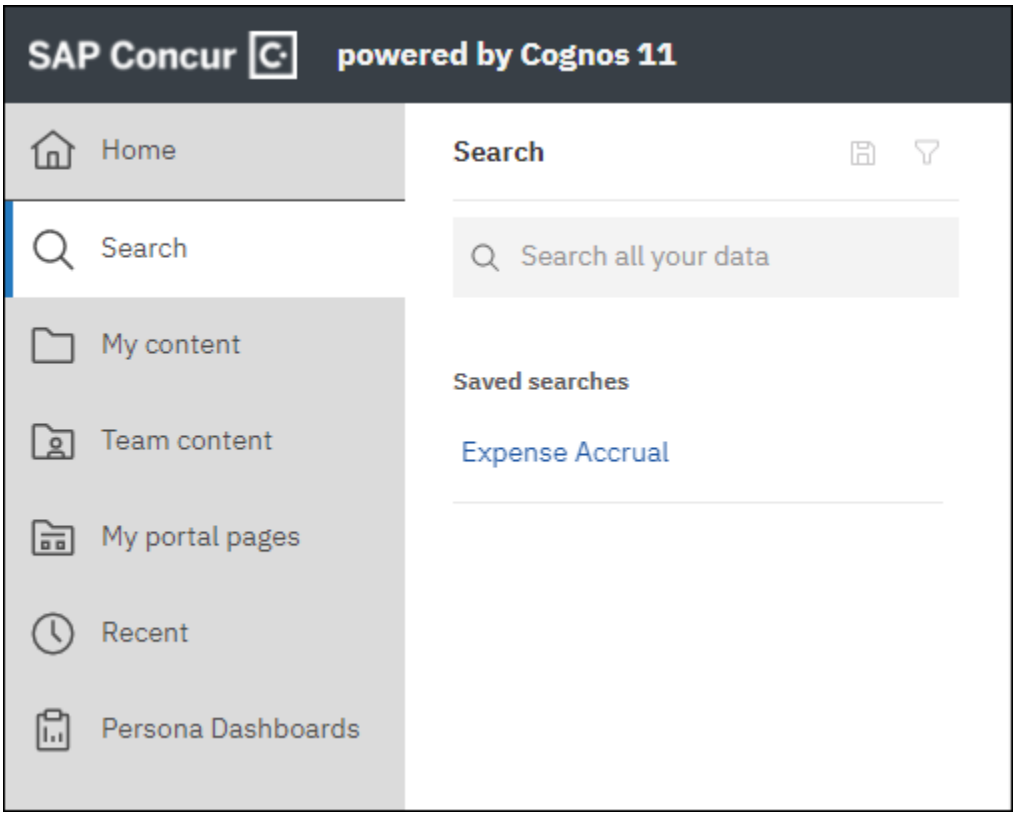
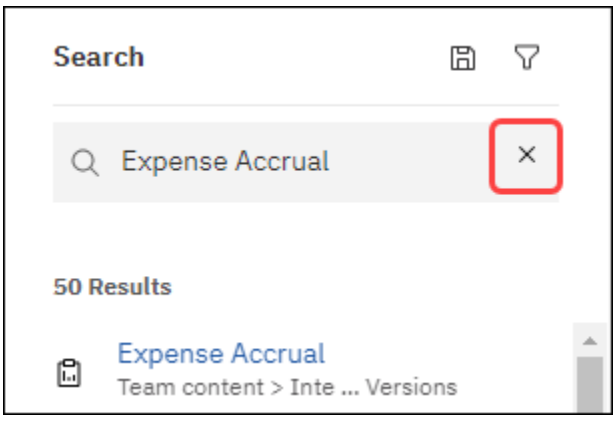
3. Saved searches are displayed on the **Search** pane when there are no search results displayed on the **Search** pane.

   The name of the saved search is the search term(s) currently in the search text box when you click the **Save search** icon, . For example, if "audit" is the search term, the saved search name will be "audit".



4. To clear your current search and remove the search results from the **Search** pane, click the **x** in the search text field.



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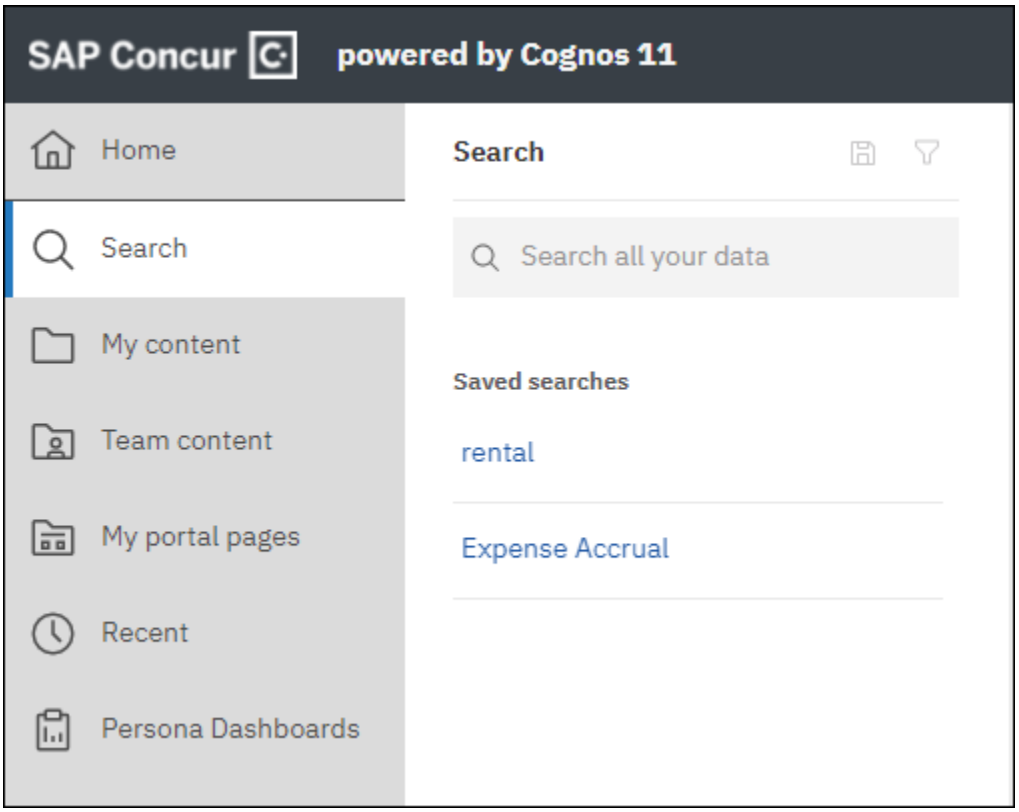
To run a saved search:

1. Click **Search**, , in the left navigation pane.

   The **Search** pane opens to the right of the left navigation pane. Any saved searches are displayed in the **Saved searches** list on the **Search** pane.



2. Click a saved search link to run the saved search.

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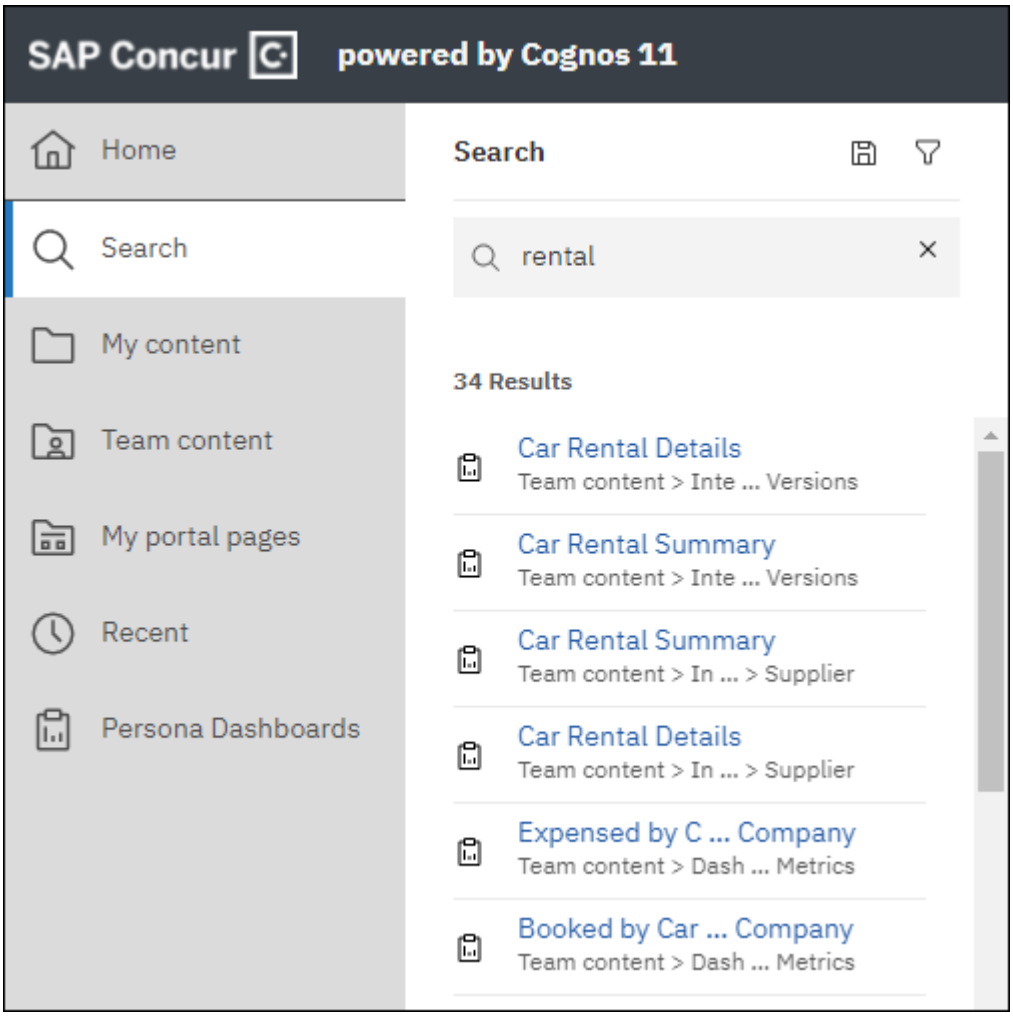
The search results for the saved search are displayed on the **Search** pane.



Section 10: Running a Report or Dashboard

The process for running a report or dashboard with its default settings is the same between Cognos 10 and Cognos 11.

To run a report or dashboard with its default settings, click the report or dashboard name.

The functionality for running a report with options is the same, but where you run a report with options in Cognos 11 is different than in Cognos 10.

NOTE: IBM has identified an error in Cognos 11 if using javascript for reports in interactive mode. To avoid this error, make sure you are running reports with the **Run with full interactivity** report setting set to *No*. The **Run with full interactivity** setting is located in Report under **RUNNING & VALIDATING**.

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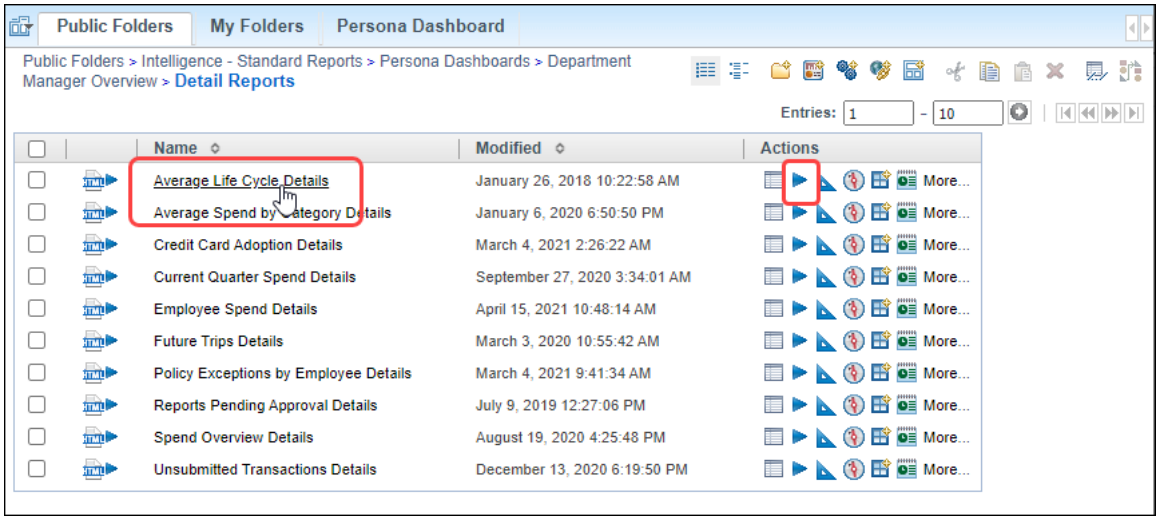
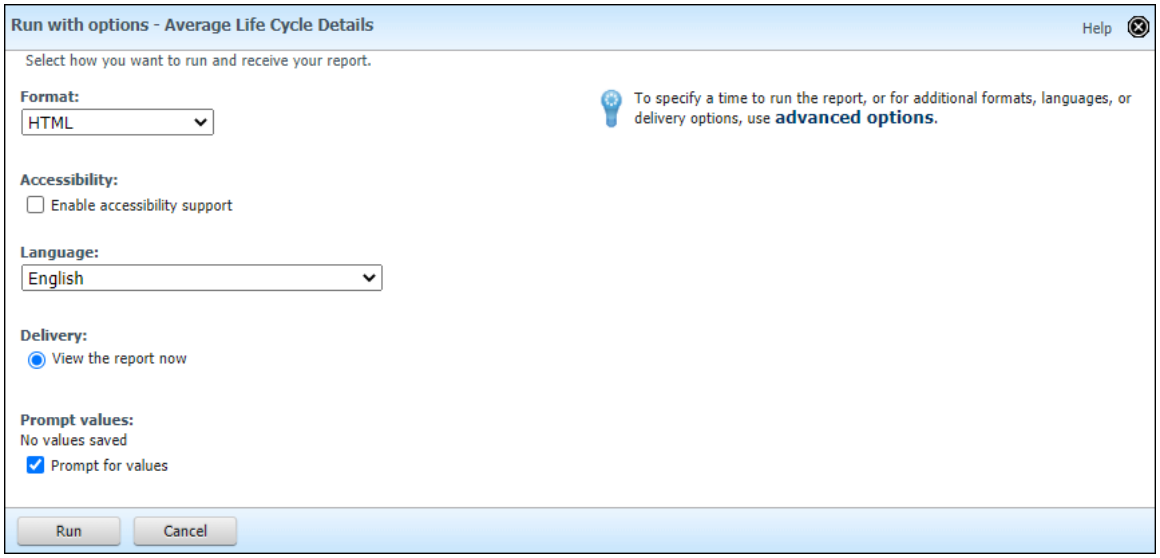
Cognos 10 UI

Click a report's or dashboard's name in the **Name** column to run the report or dashboard with its default settings.



To run a report or dashboard with options, click the **Run with options** icon, .

On the **Run with options** page, select how you want to run and receive the report or dashboard.



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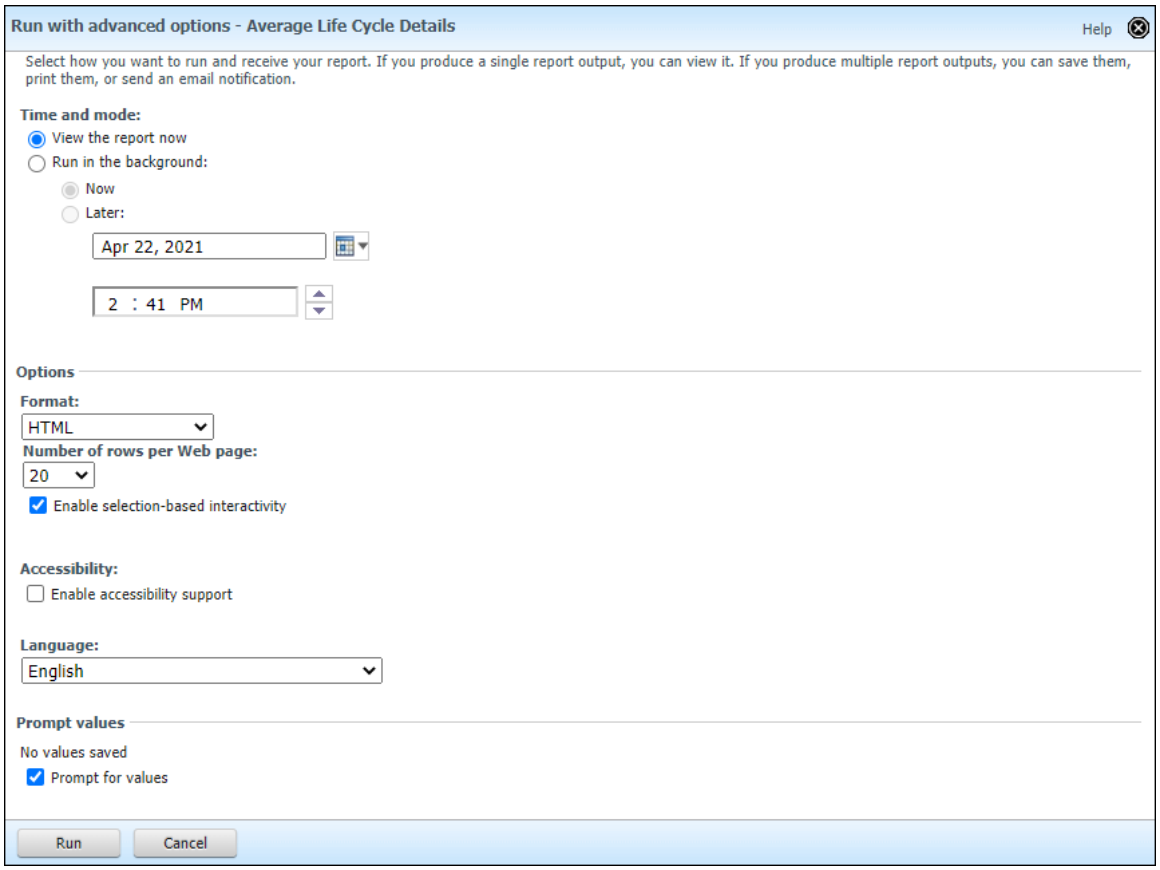
If you want to run a report or dashboard with advanced options, click the **advanced options** link on the **Run with options** page.



Click the **Run** button to run the report or dashboard.

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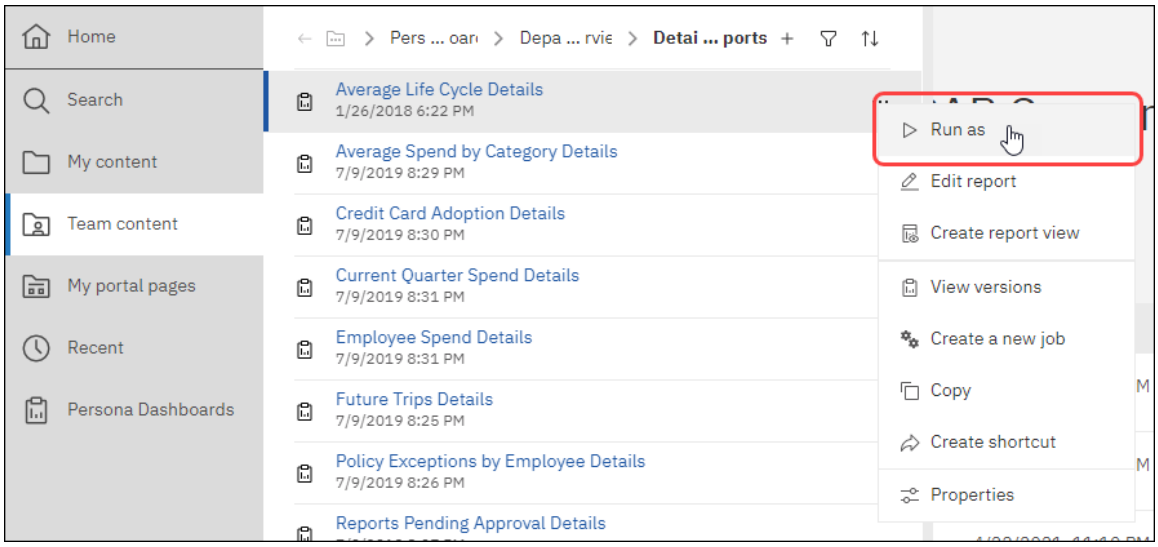
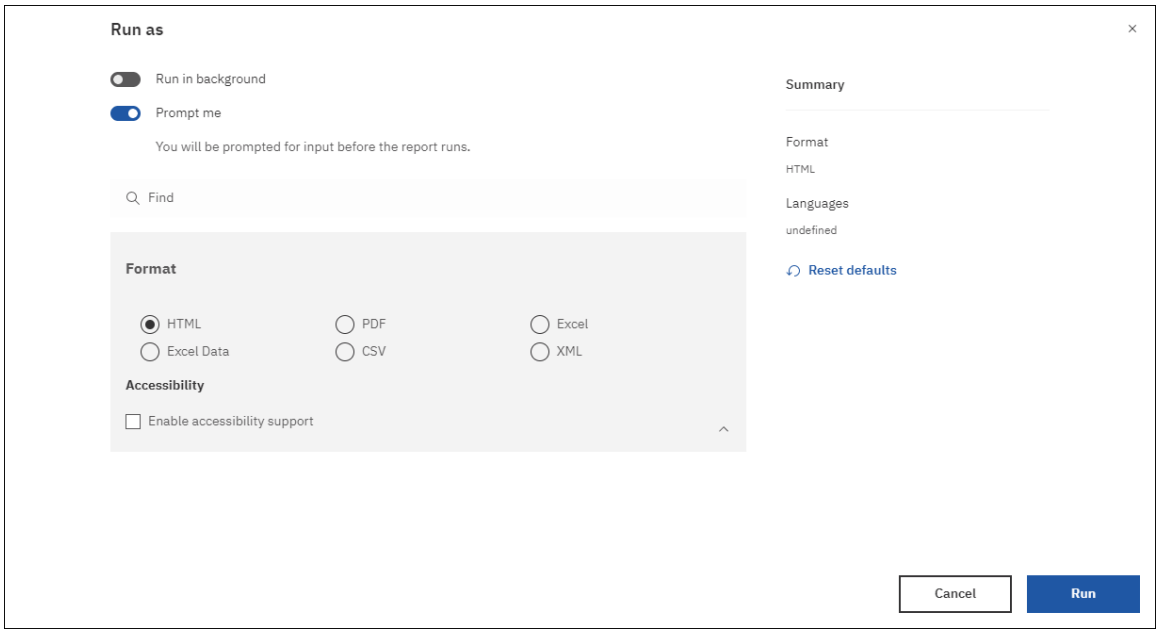
Cognos 11 UI

To run a report or dashboard, click the **More** icon, , and then click **Run as**.



On the **Run as** page, select how you want to run and receive the report or dashboard.



Click the **Run** button to run the report or dashboard.

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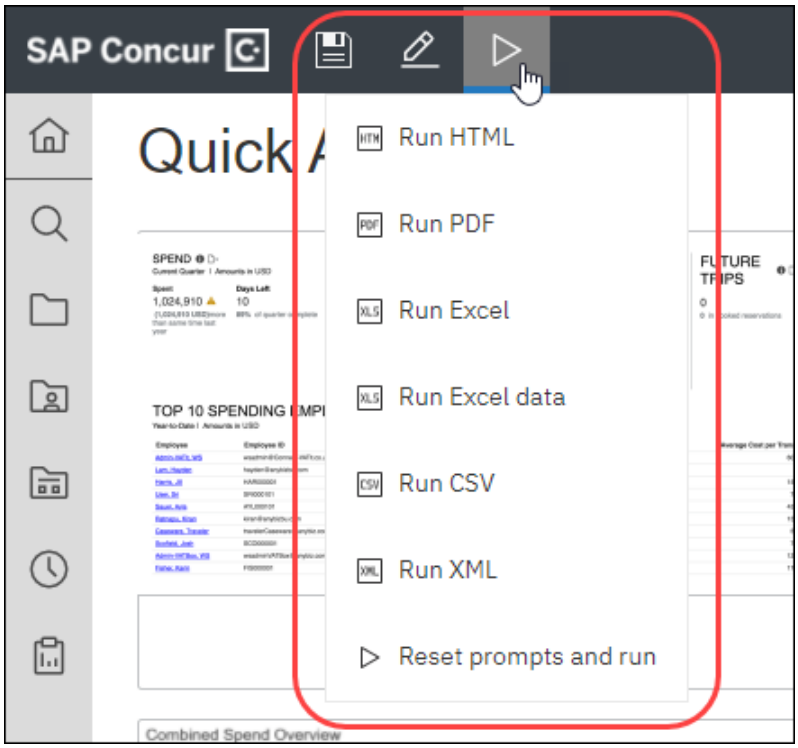
After a report or dashboard runs, you can click the **Run As** icon, , on the top navigation bar to access additional run options.

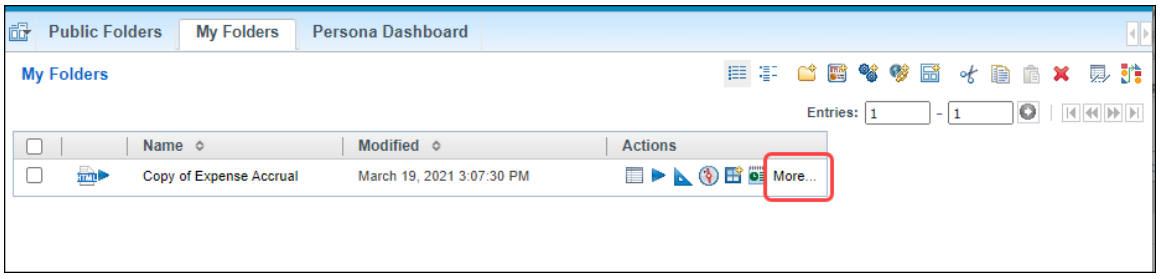


Section 11: Copying or Moving a Report

In Cognos 11, the copy and move functionality is available on the **More** menu for a report.

Cognos 10 UI

To copy or move a report in Cognos 10, click the **More** link in the **Actions** column.



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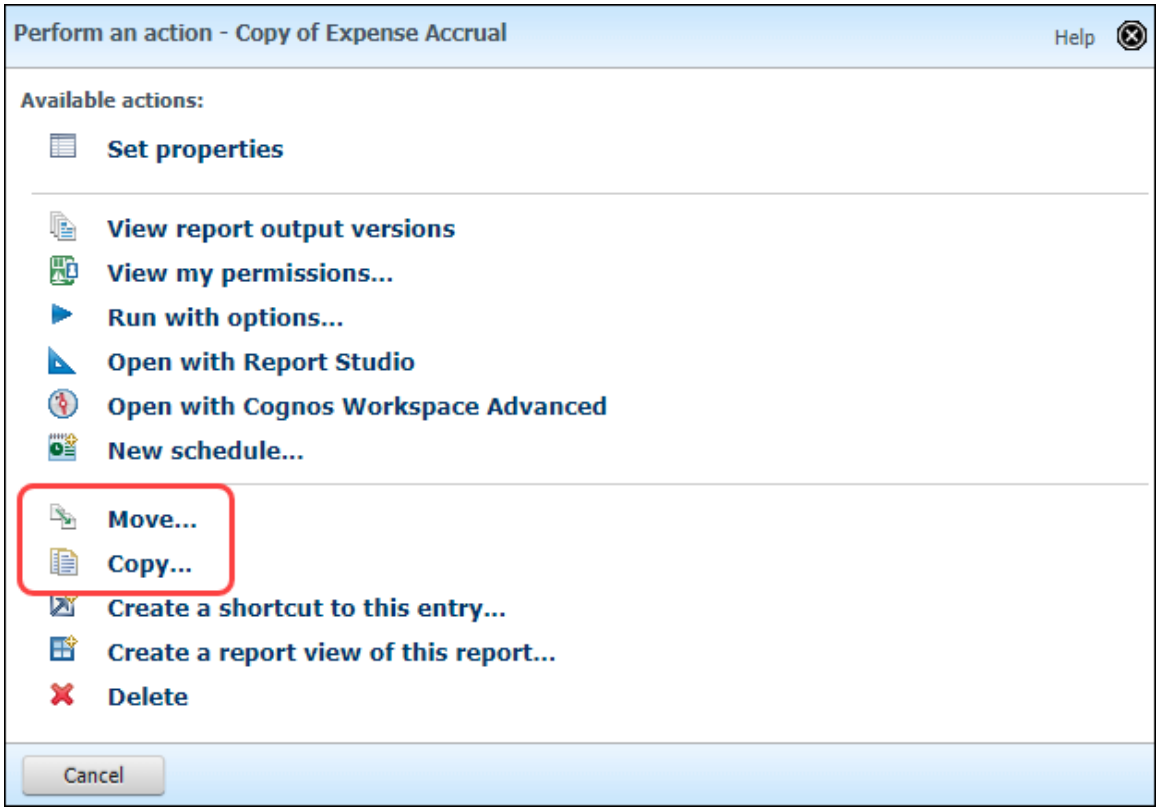
On the **Perform an action** page, click **Copy** or **Move**.



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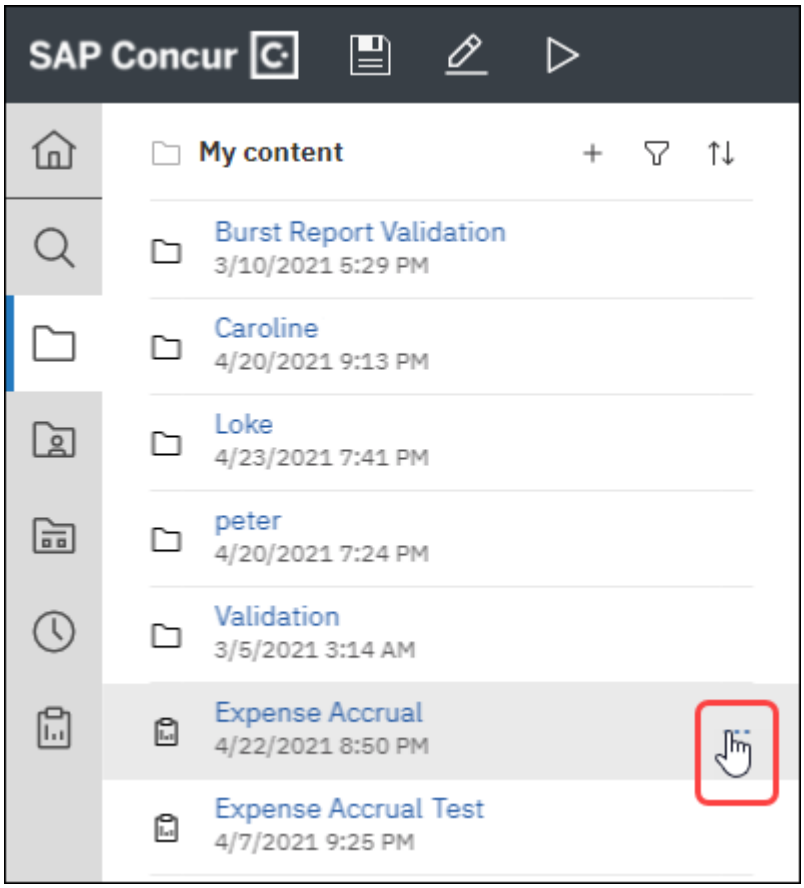
Cognos 11 UI

To copy or move a report in Cognos 11, click the **More** icon for the report.



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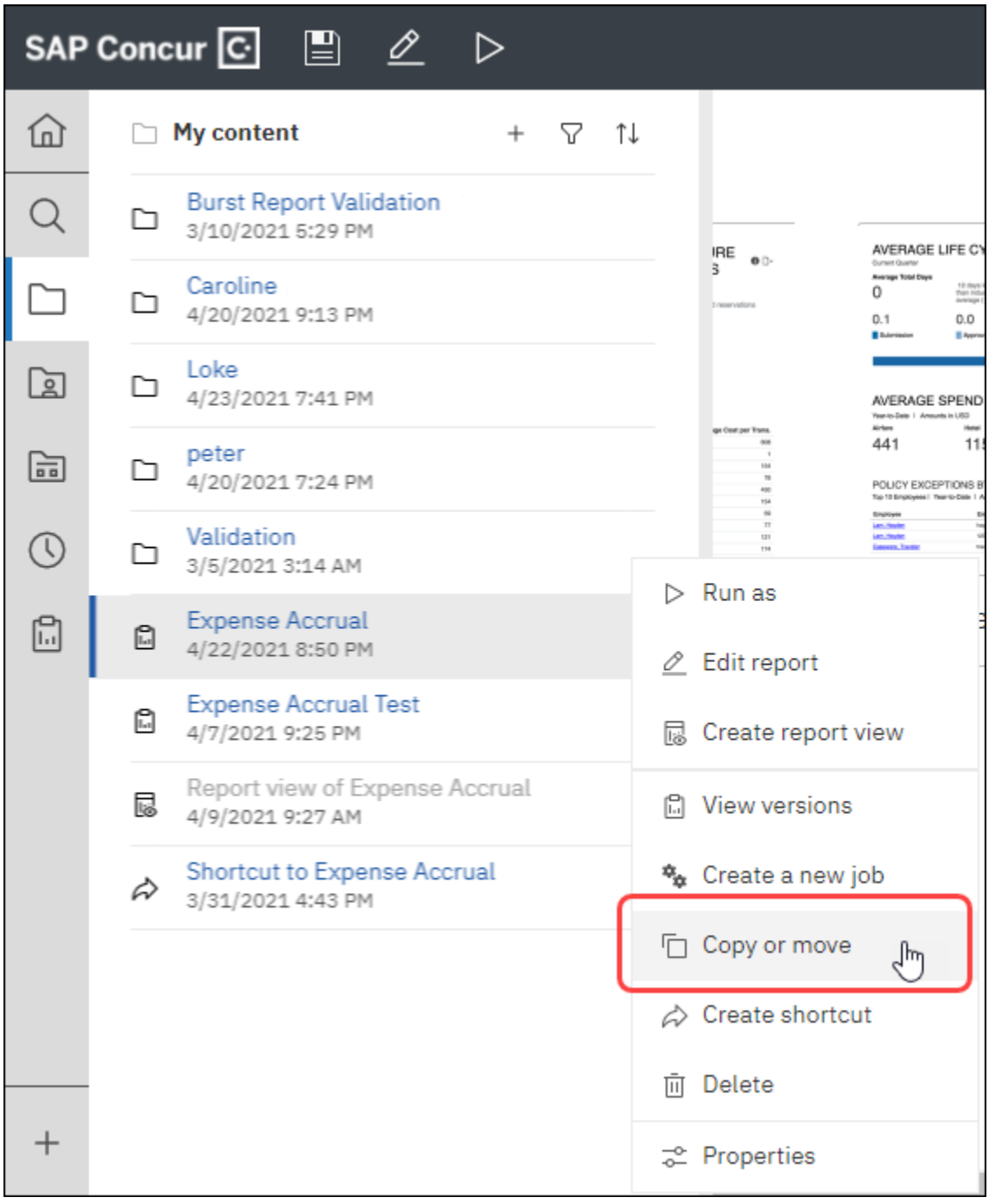
On the **More** menu, click **Copy or move**.



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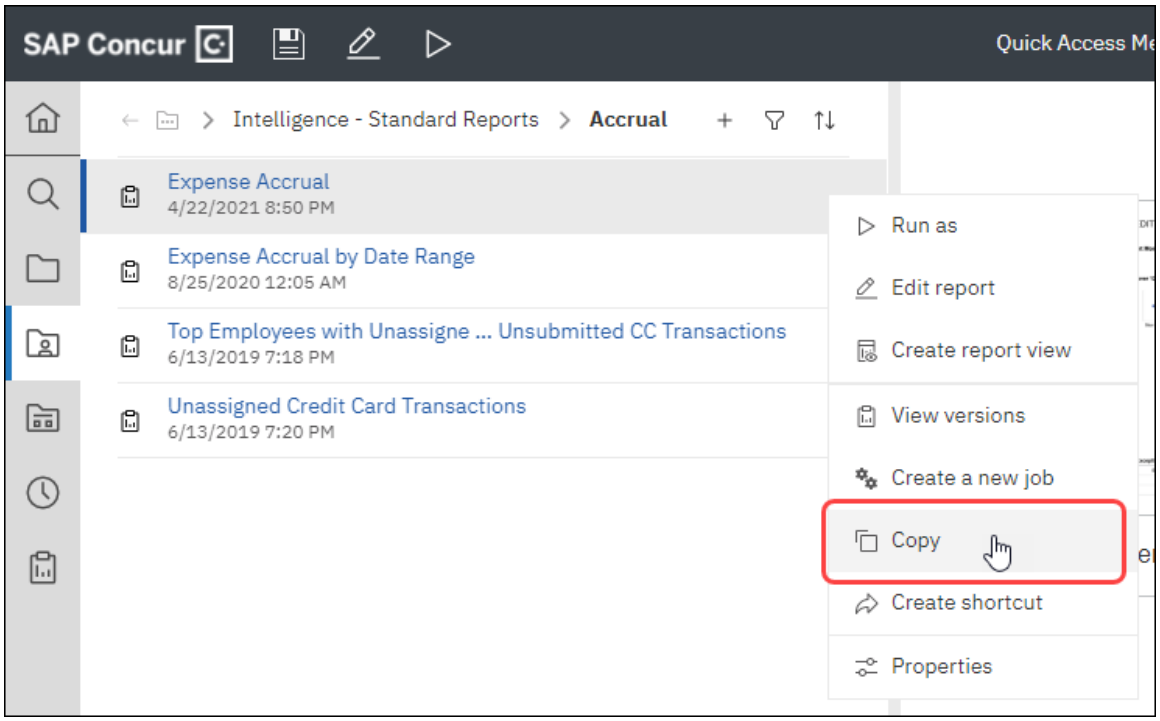
Like Cognos 10, in Cognos 11, the move function is intentionally not available for reports or dashboards in the **Intelligence – Standard Reports** or **Analysis – Standard Reports** folder. In the **Intelligence – Standard Reports** or **Analysis – Standard Reports** folder, **Copy** is displayed on the **More** menu instead of **Copy or move**.



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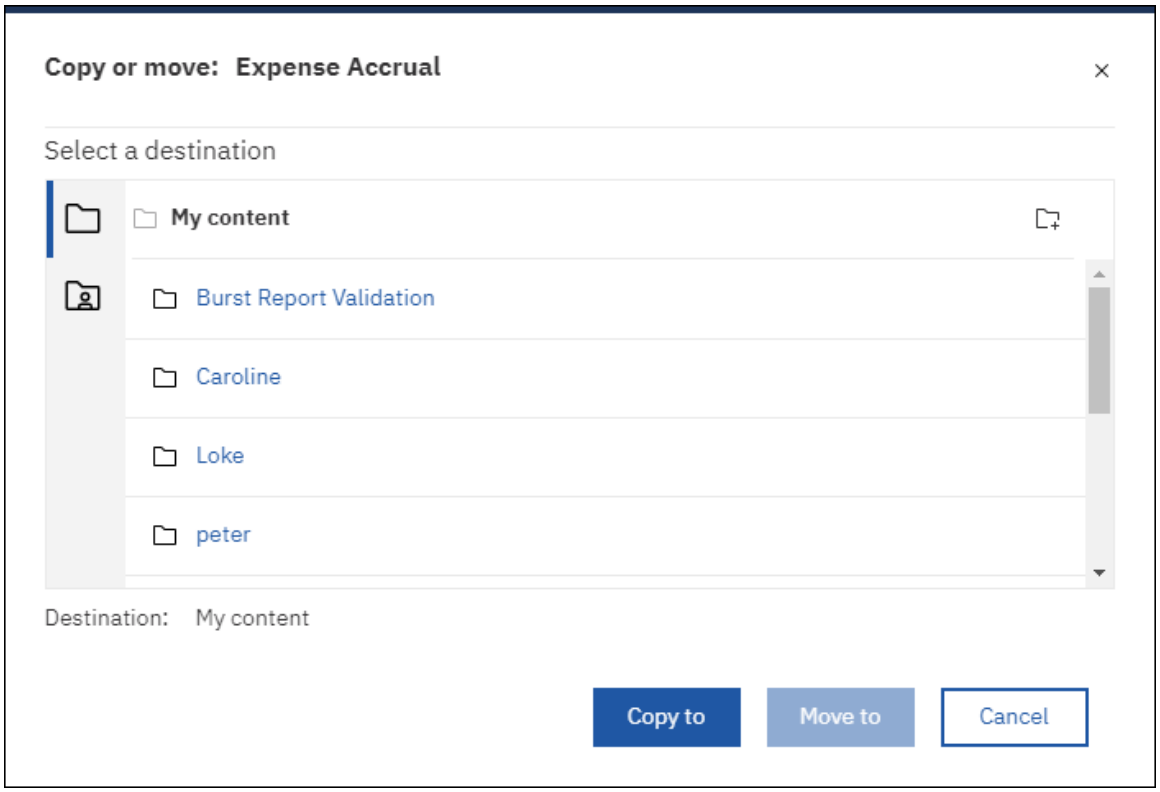
Clicking **Copy or move** or **Copy** opens the **Copy or move** dialog.



Select the destination where you want to copy or move the report, and then click the **Copy to** button to copy the report or click the **Move to** button to move the report.

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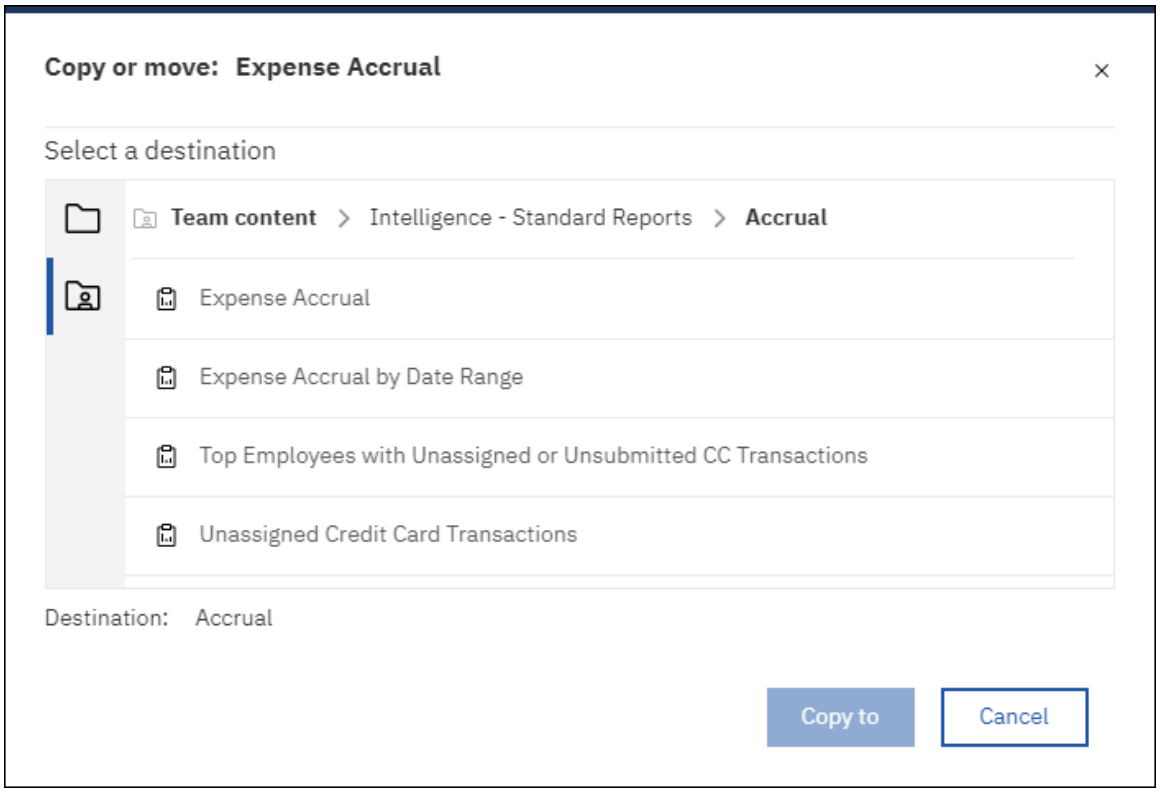
If the move function is not available for a report, the **Move to** button is not displayed in the **Copy or move** dialog.



Section 12: Scheduling a Report

Like Cognos 10, in Cognos 11, only reports or dashboards in the **My content** folder (**My Folders** folder in Cognos 10) or your company's folder can be scheduled. You cannot schedule standard reports or dashboards in the **Intelligence – Standard Reports** folder or **Analysis – Standard Reports** folder.

NOTE: Reports or dashboards can only be scheduled in Analysis if you are assigned the Cognos Professional Author role for Analysis.

If you want to schedule a standard report, you will need to create a report view of the report and then schedule the report view. You can also copy the standard report to the **My content** folder or your company's folder and schedule the copy of the standard report.

The process and functionality for scheduling a report or dashboard is the same between Cognos 10 and Cognos 11, but where you create a report view and schedule a report in Cognos 11 is different than in Cognos 10.

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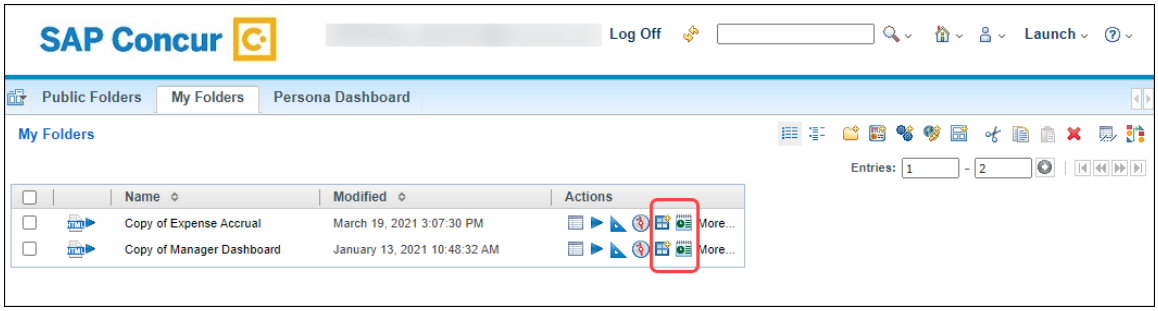
Cognos 10 UI

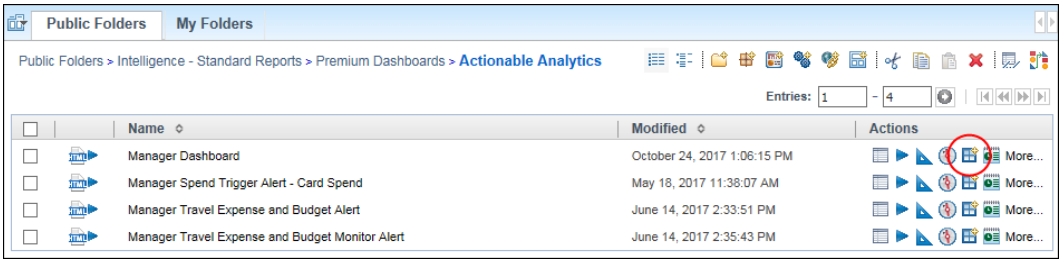
In Cognos 10, report views and schedules are created from the **Actions** column for a report or dashboard.



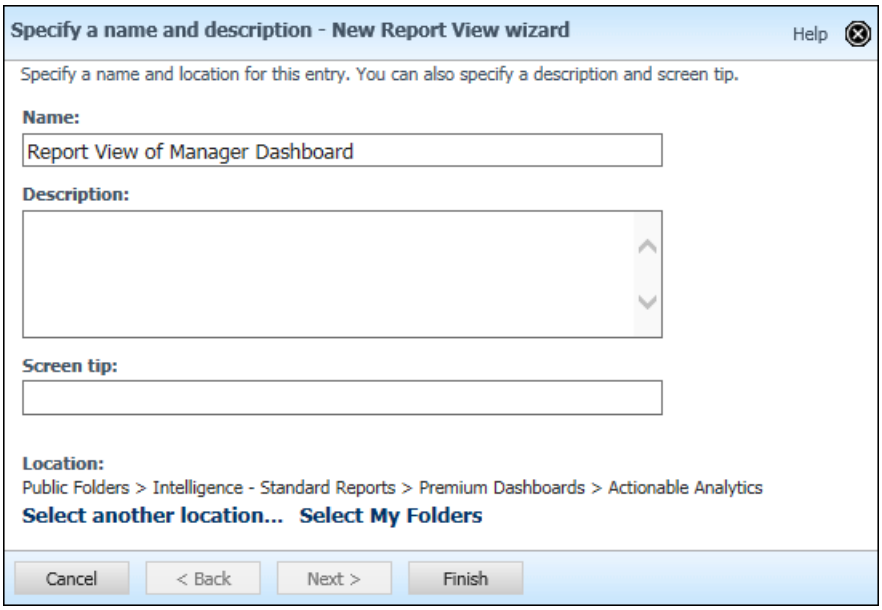
To create a report view for a report or dashboard:

1. Navigate to the applicable report or dashboard.

2. Click the **Create a report view of this report** icon, , for the report or dashboard.



The **New Report View wizard** page opens.



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3. Enter the report name, description, and screen tip.

   It is best practice to save the report view to **My Folders** so that the view is only visible and available to you.

4. In the **Location** section, click **Select My Folders**, and then click **Finish**.

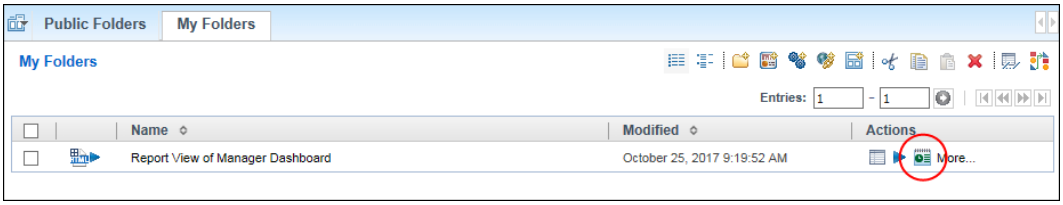
   Clicking **Finish** creates a report view for the report or dashboard on the **My Folders** tab.

To schedule a report or report view:

1. Click the **My Folders** tab.

2. Click the **Schedule** icon, , for the report or report view.

NOTE: The **Schedule** icon, , is only available in Intelligence or if you are assigned the Cognos Professional Author role for Analysis. The **Schedule** icon, , is only available in Analysis if you assigned the Cognos Professional Author role.



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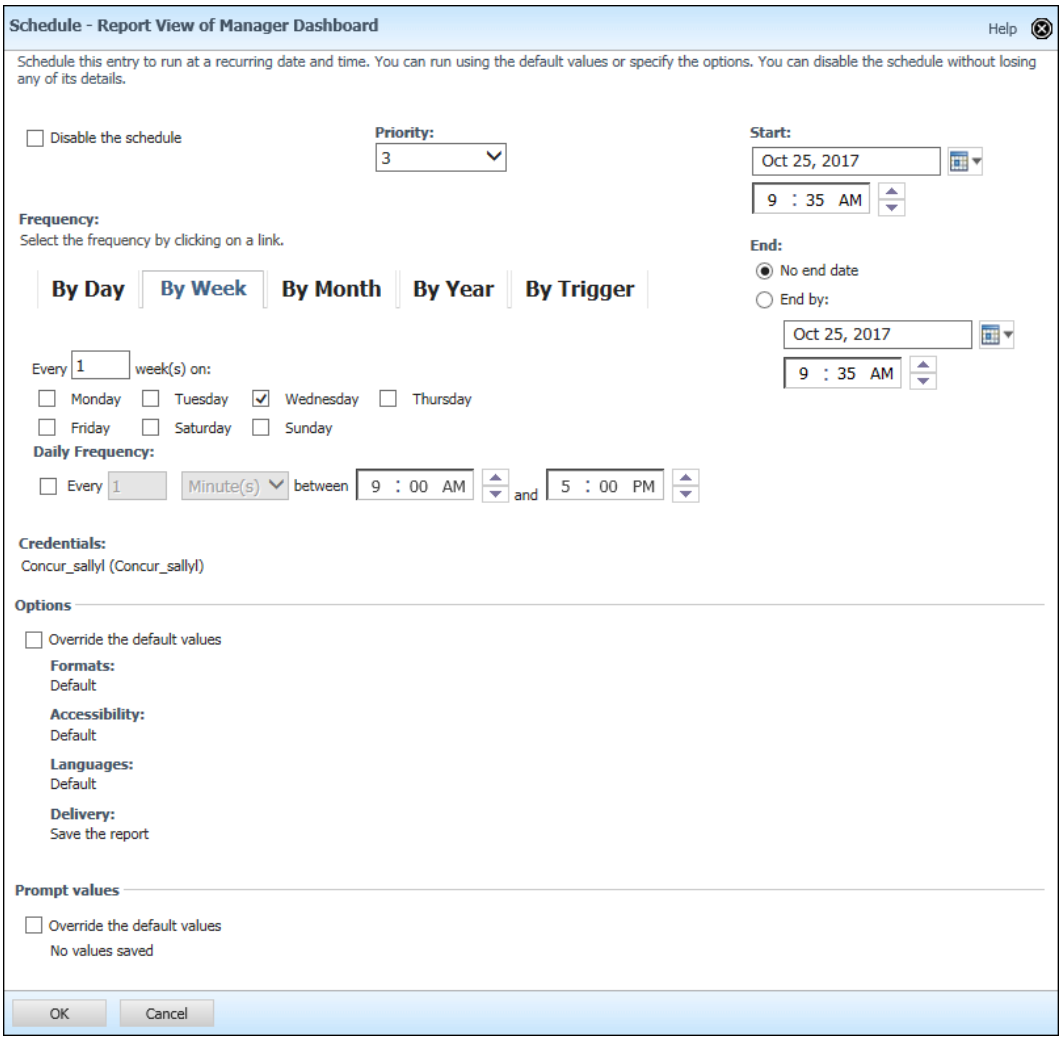
The **Schedule** page opens.



3. Define the schedule for the report or report view, and then click **OK**.

   When you create a schedule for a report or report view, you are the schedule owner for this report schedule.

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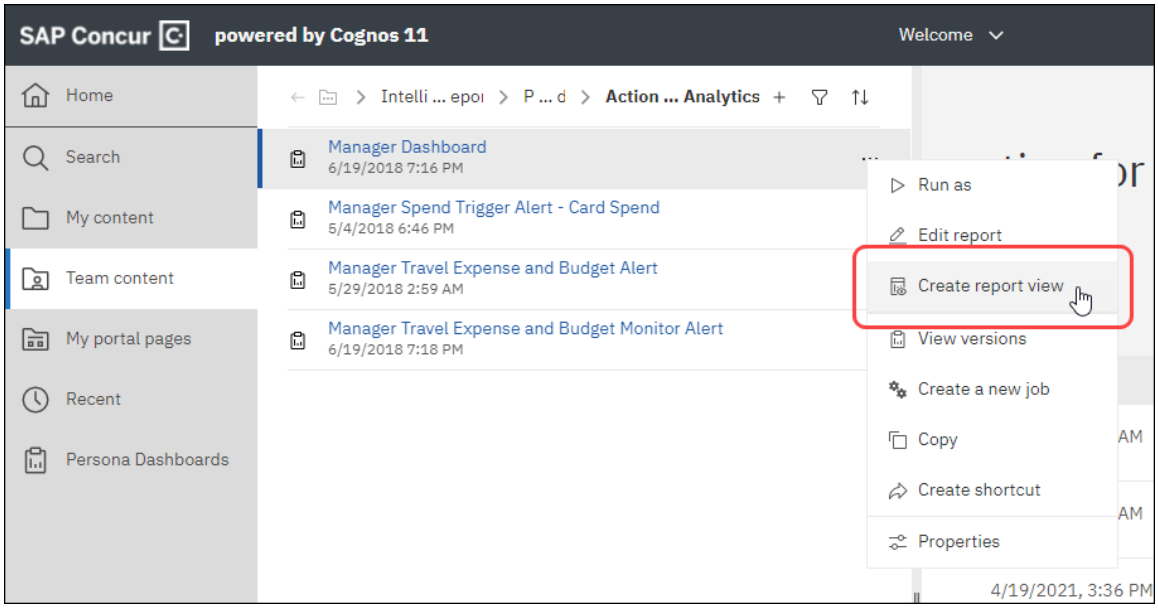
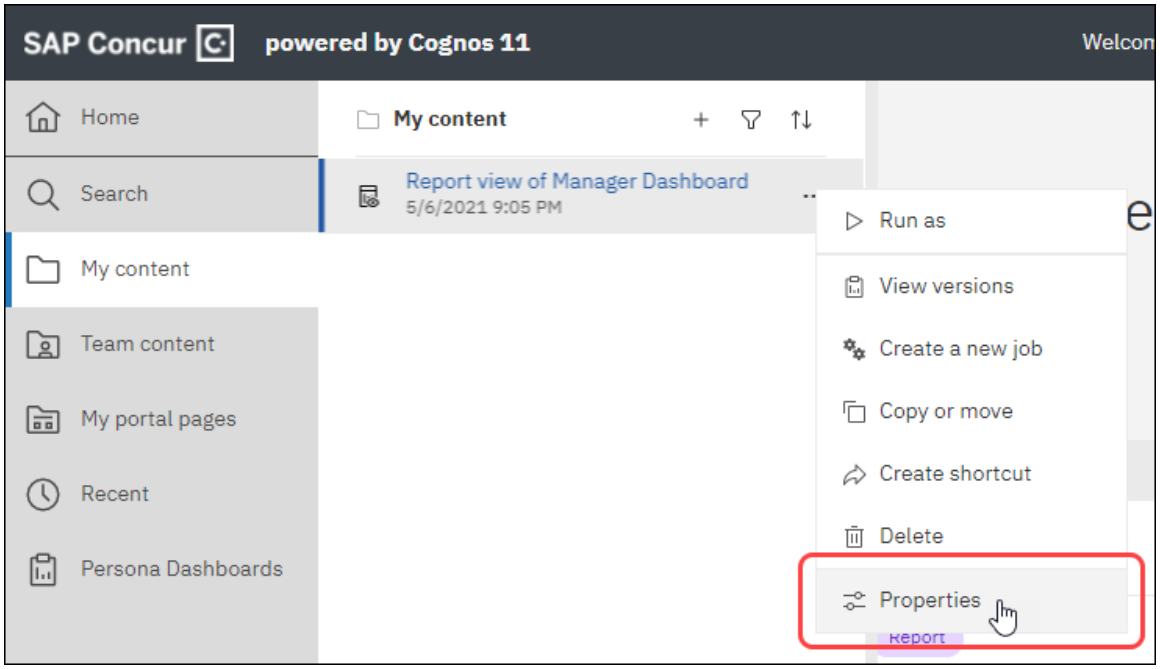
Cognos 11 UI

In Cognos 11, report views and schedules are created from the **More** menu for a report or dashboard in Team content or My content.

Report views are created by clicking **Create report view** from the **More** menu.



Schedules are created for reports and report views in the **My content** folder or your company's folder by clicking **Properties** on the **More** menu and then clicking the **Schedule** tab.



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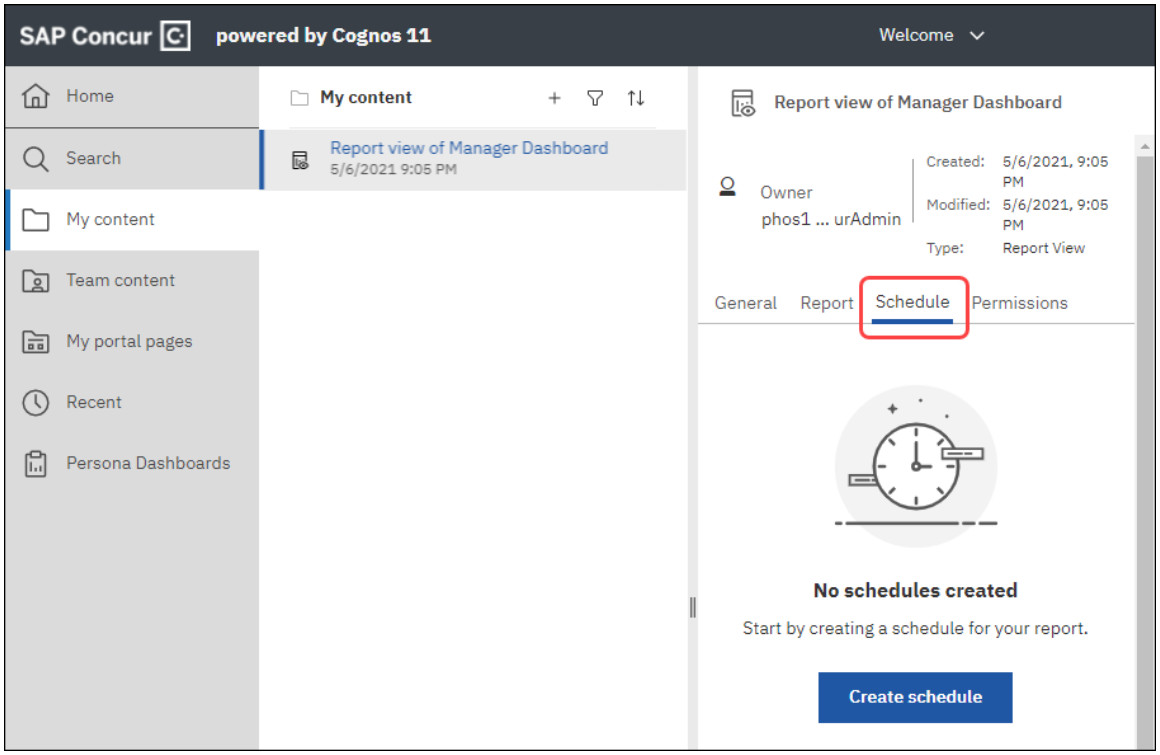

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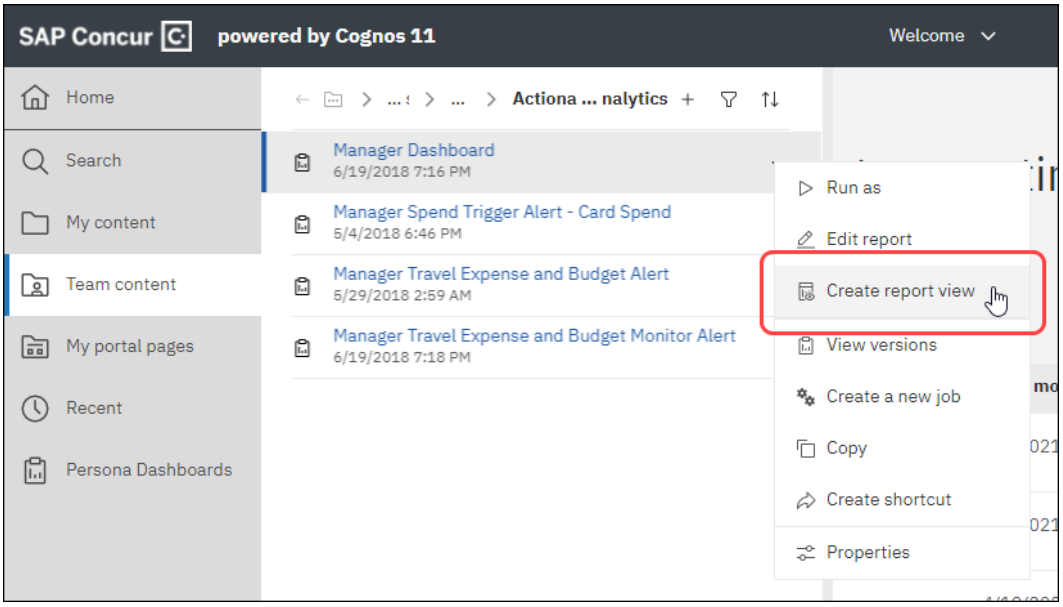
To create a report view for a report or dashboard:

1. In the **My content**, **Team content**, or **Recent** folder list, navigate to the applicable report or dashboard.

2. Click the **More** icon, , for the report or dashboard and then click *Create report view*.



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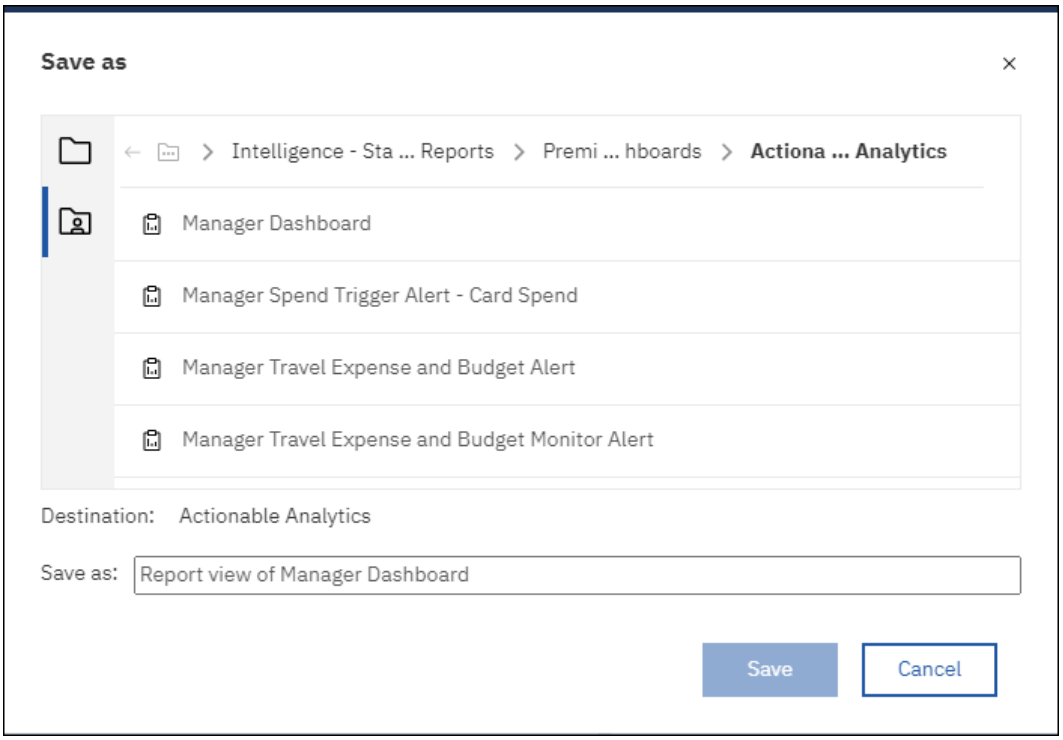
The **Save as** dialog opens with the current folder displayed.



It is best practice to save the report view to **My content** so that the view is only visible and available to you.

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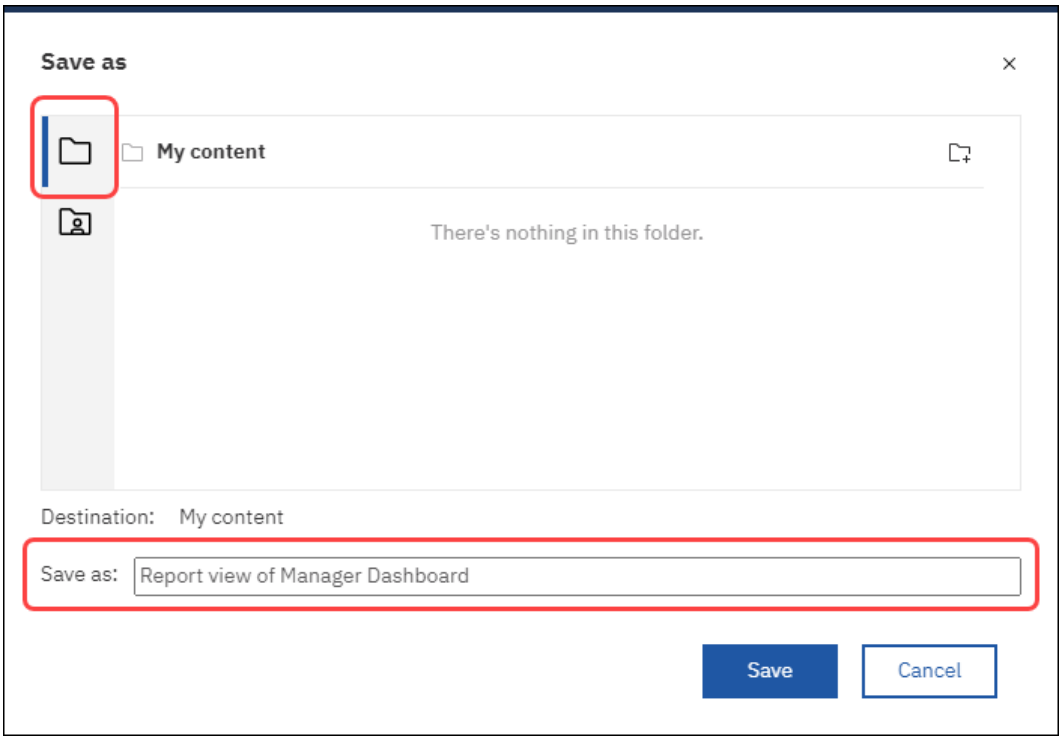
3. Click the **My content** icon, and in the **Save as** field, enter the report view name.



4. Click **Save**.

   Clicking **Save** creates a report view for the report or dashboard in My content.

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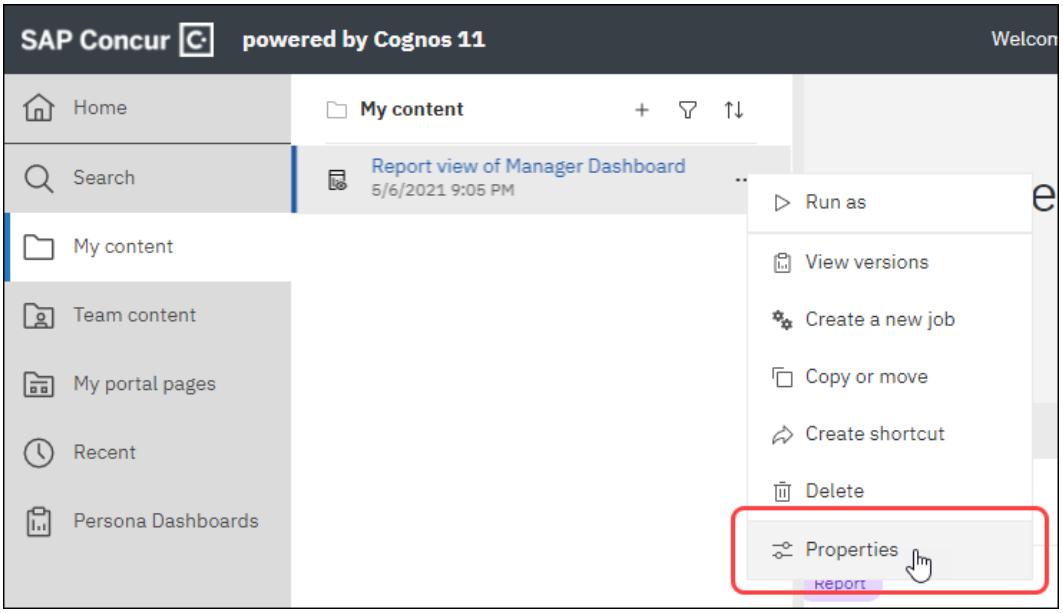
- ***To schedule a report or report view:***

1. Click **My content**, , in the left navigation pane.

2. Click the **More** icon, , for the report or report view and then click **Properties**.



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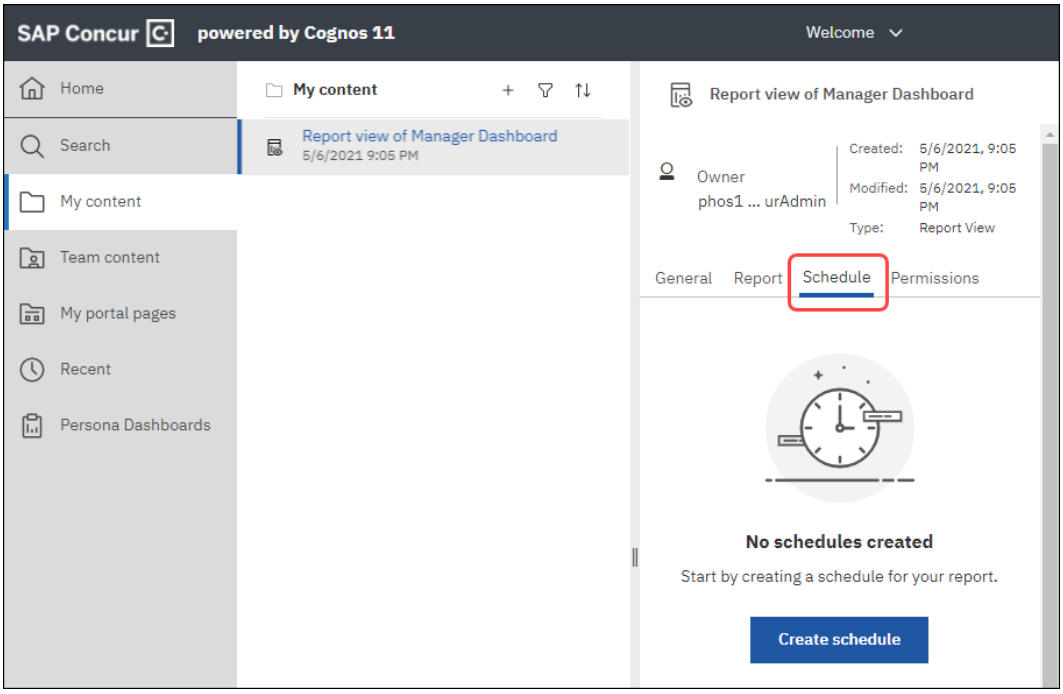
The **Properties** pane opens to the right of the **My content** folder list.

3. Click the **Schedule** tab.



4. Click the **Create schedule** button.

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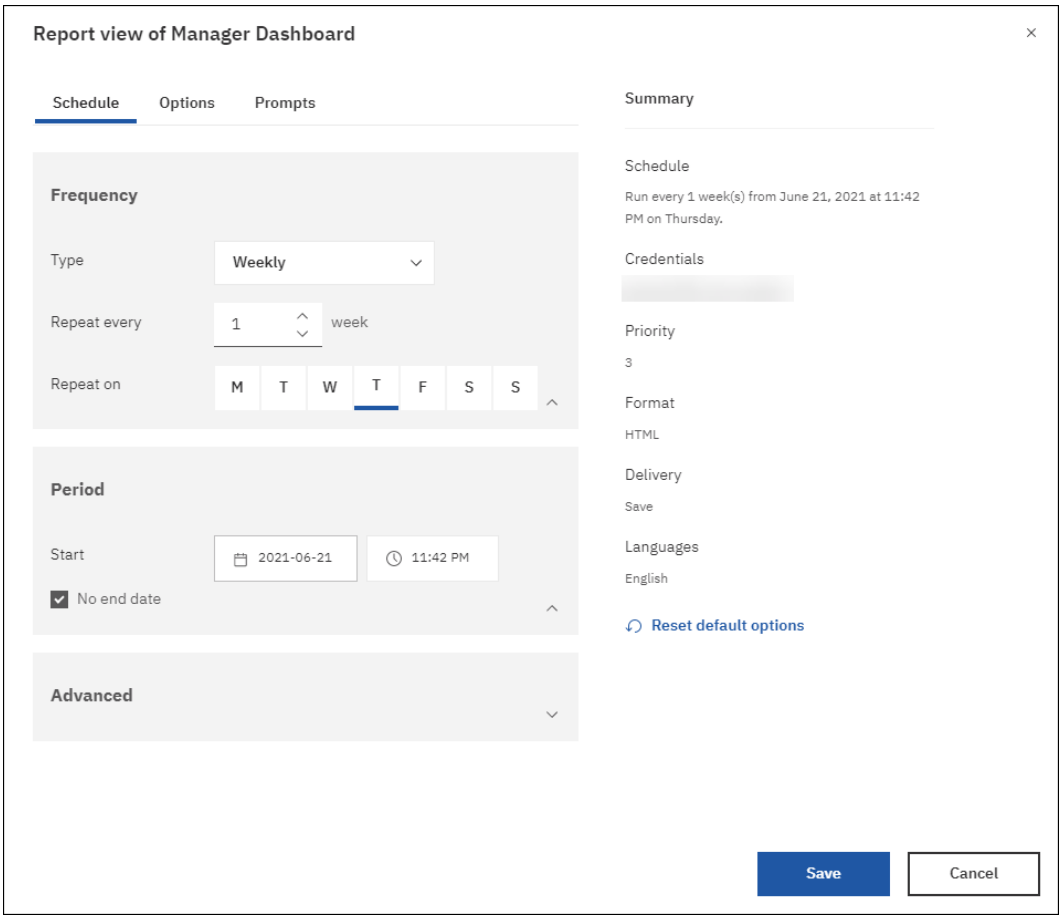
The schedule page opens.



5. Define the schedule for the report or report view.

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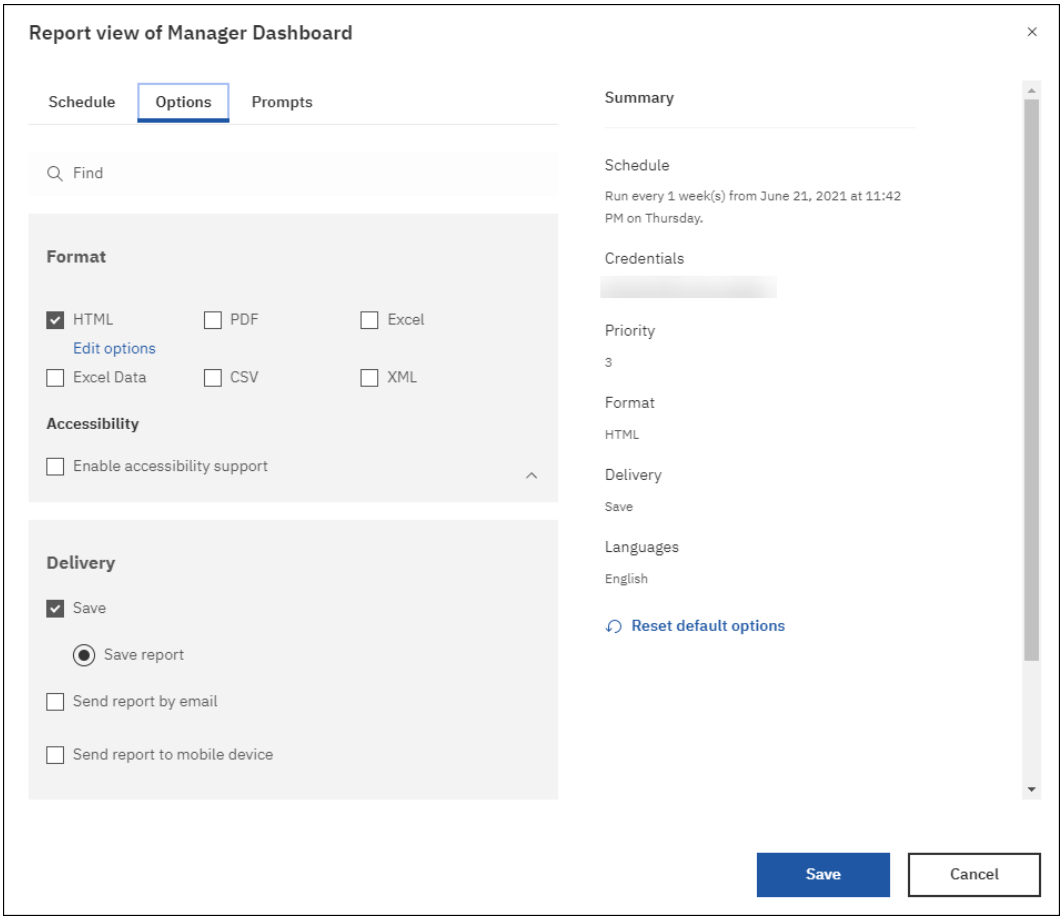
6. Click the **Options** tab.



7. Define the options for the report or report view.

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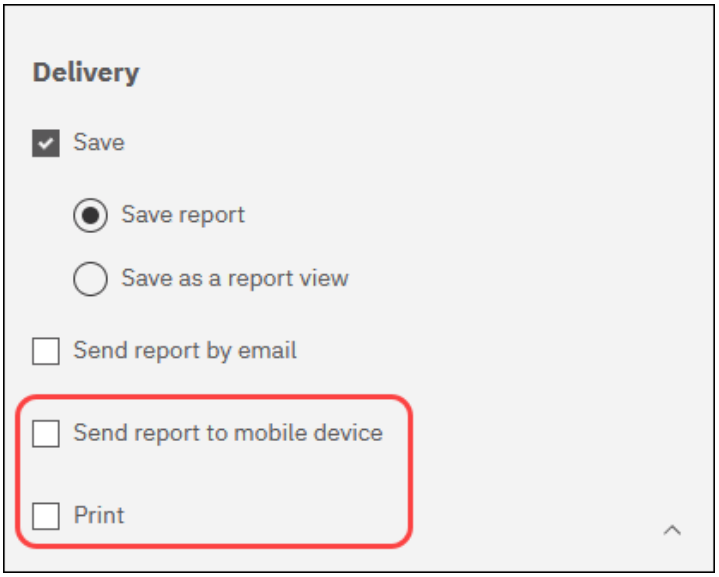
NOTE: In Cognos 11, IBM has identified a known issue regarding the **Send report to mobile device** and **Print** delivery options on the **Options** tab. The **Send report to mobile device** and **Print** check boxes are displayed and can be selected, but these two delivery options are not currently supported. Do not use the **Send report to mobile device** and **Print** delivery options at this time.



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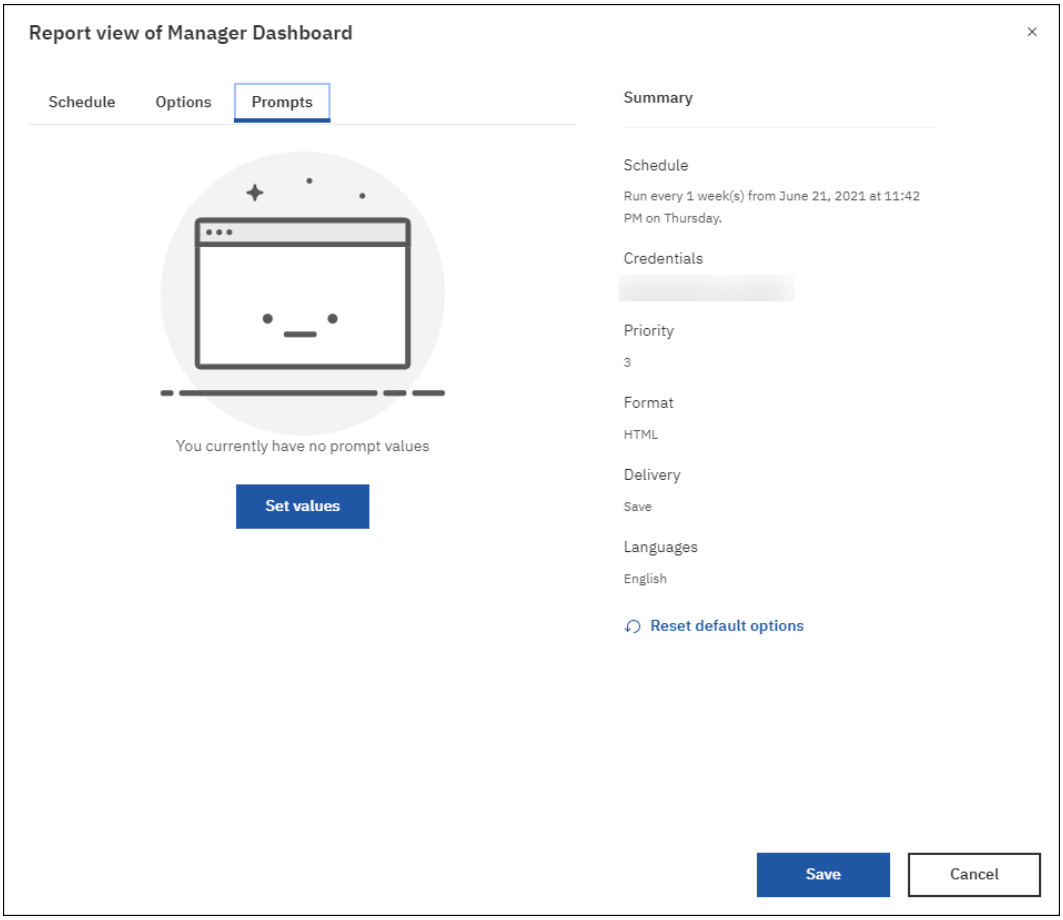
8. Click the **Prompts** tab.



9. Define the prompts for the report or report view, and then click **Save**.

Section 13: Creating Jobs

In Cognos, jobs are a collection of reports, report views, and other jobs that are scheduled together. The individual steps for a job reference each report, job, and/or report view assigned to the job.

The process and functionality for creating a job is the same between Cognos 10 and Cognos 11, but where you create a job in Cognos 11 is different than in Cognos 10.

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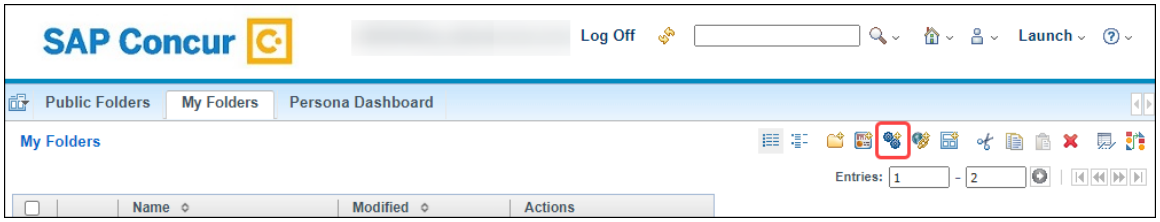
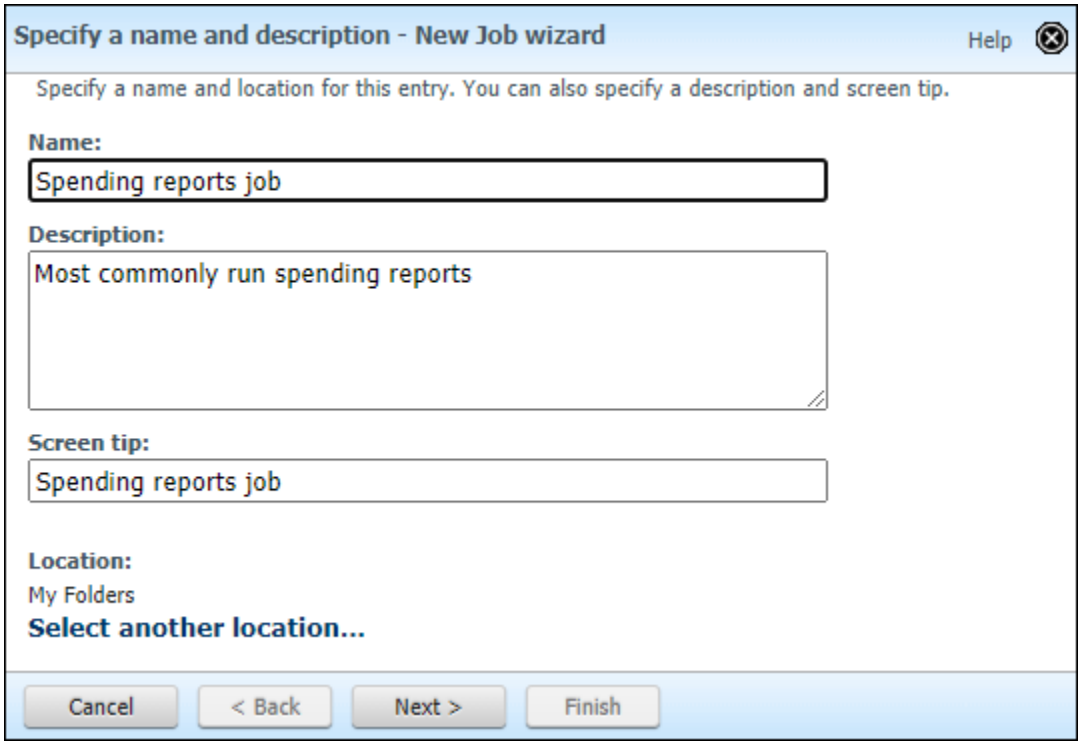
Cognos 10 UI

In Cognos 10, jobs are created by clicking the **New Job** button, , at the top of the **Public Folders** and **My Folders** tabs.



Clicking the **New Job** button opens the **Specify a name and description – New Job wizard** page. Enter the job name, description, and screen tip, select the location for the job, and then click **Next**.



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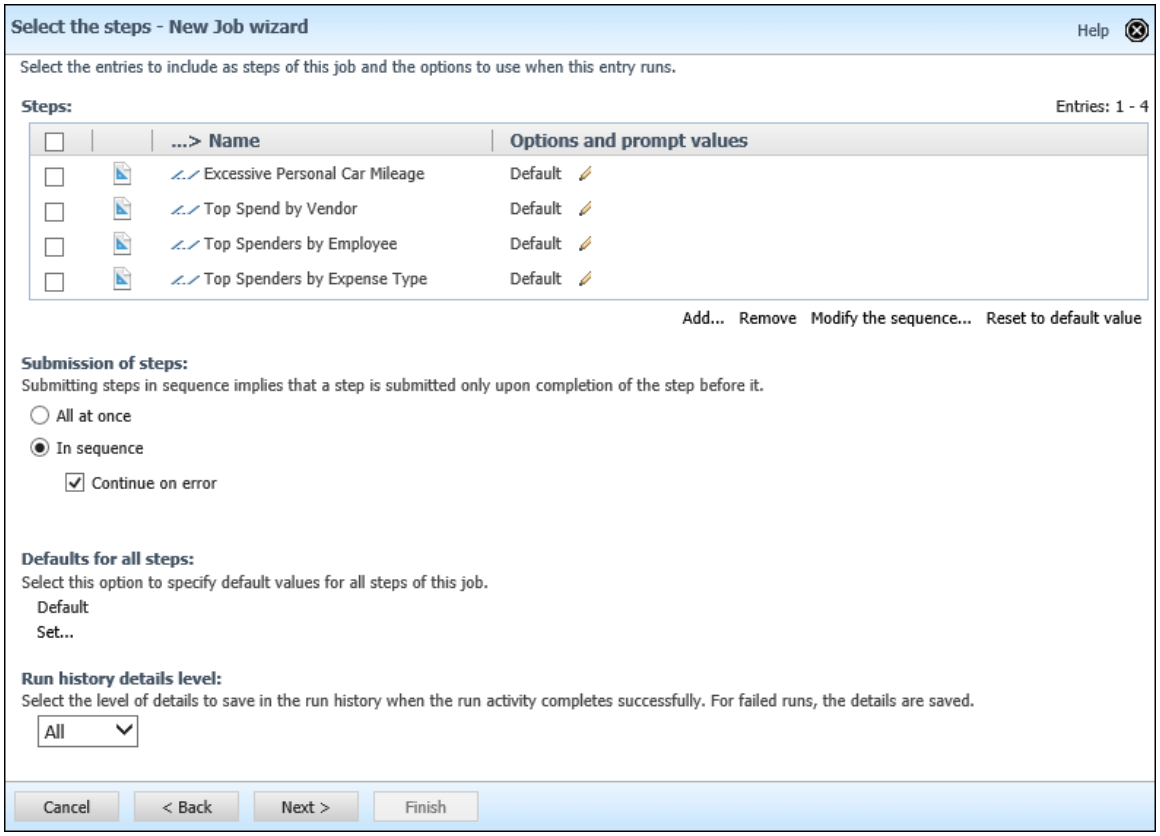
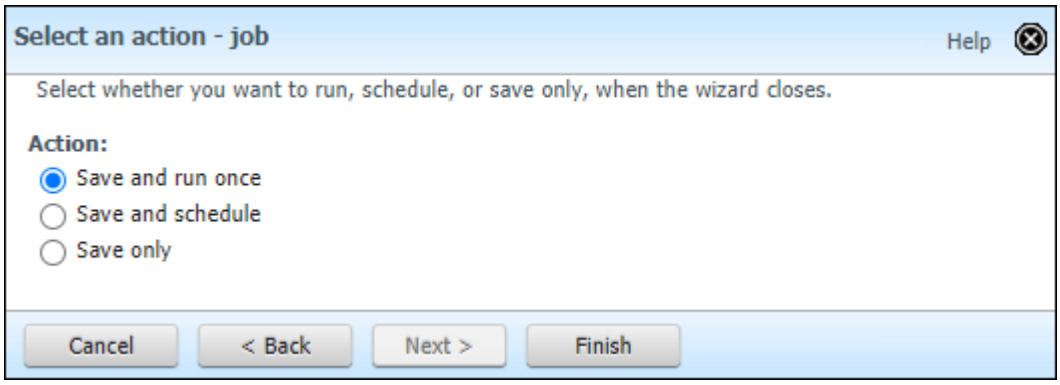
Clicking **Next** opens **the Select the steps – New Job wizard** page. Select the reports, report views, and/or other jobs you want to assign to the job, define the sequence of the reports, report views, and/or other jobs for the job, configure the other job settings, and then click **Next**.

NOTE: It is best practice to run the steps of a job in sequence.



Clicking **Next** opens the **Select an action - job** page. Click the save option for the job, then click **Finish**.



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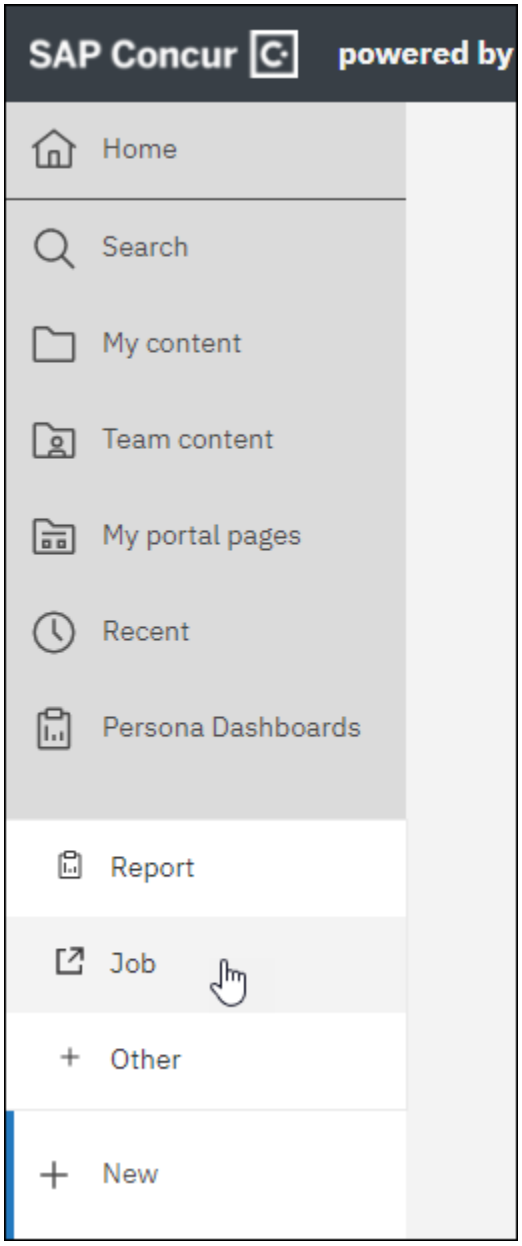
Cognos 11 UI

In Cognos 11, jobs are created from the **New** menu on the left navigation pane.

Click **New**, and then click **Job** to open the **New job** page.



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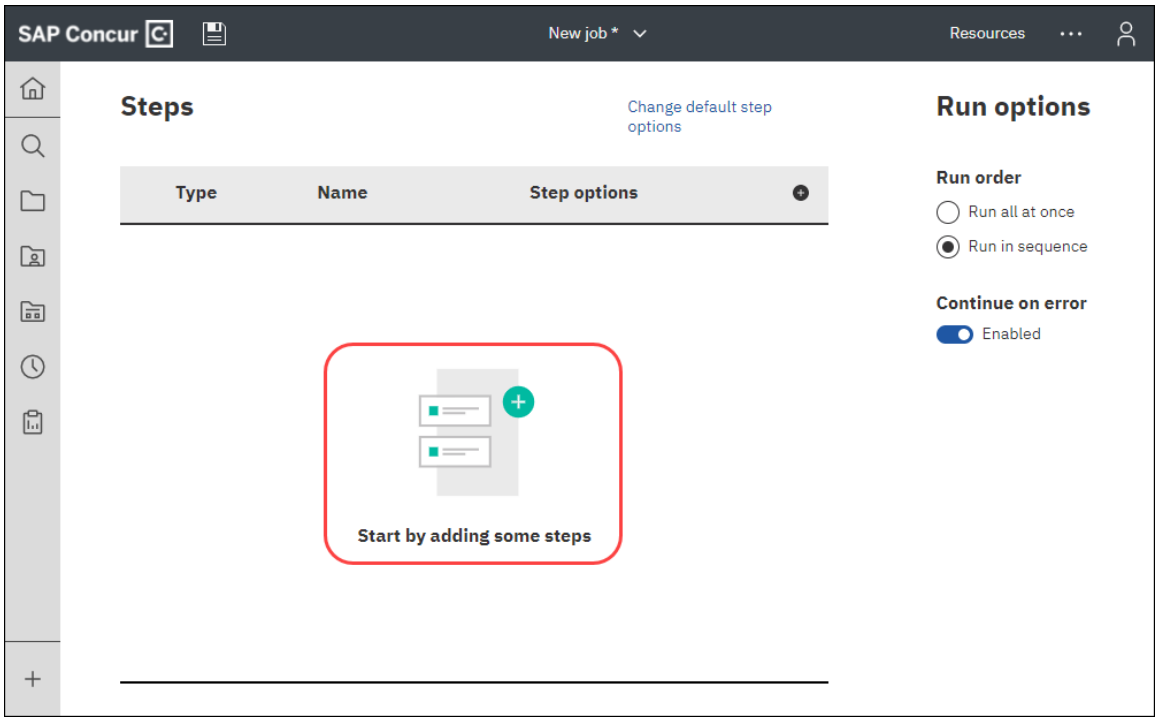
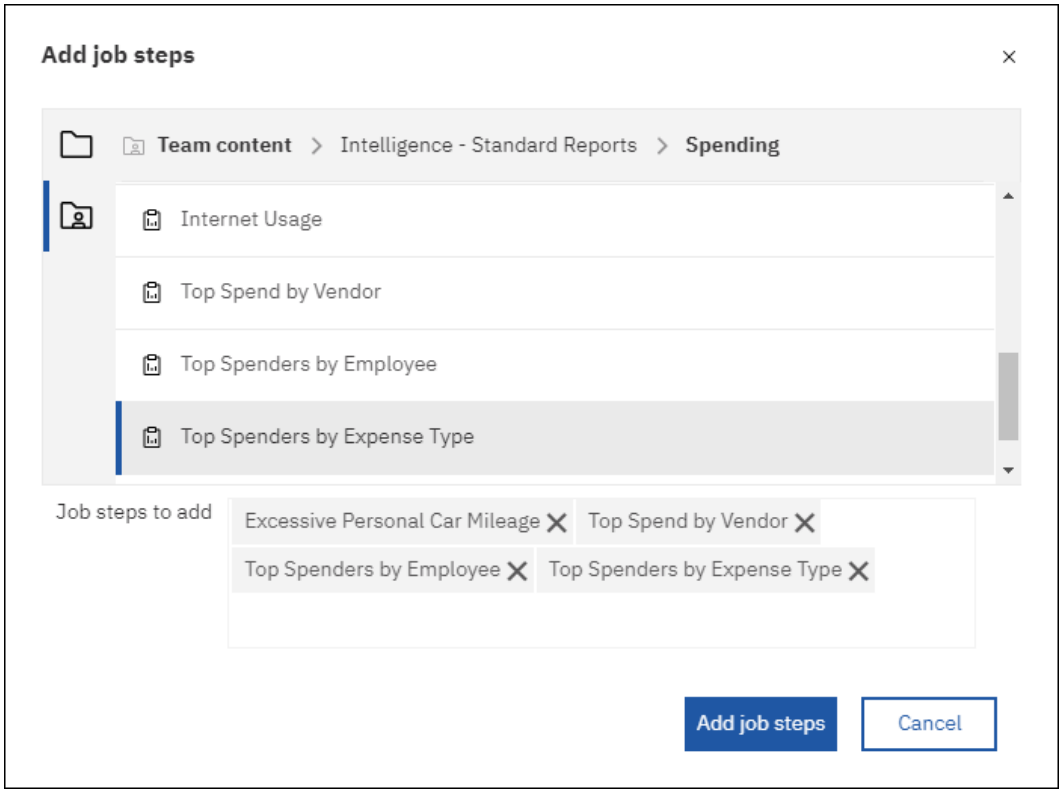
In the **Steps** section, click **Start by adding some steps**.



In the **Add job steps** dialog, navigate to and select the reports, report views, and/or other jobs you want to assign to the job, and then click the **Add job steps** button.



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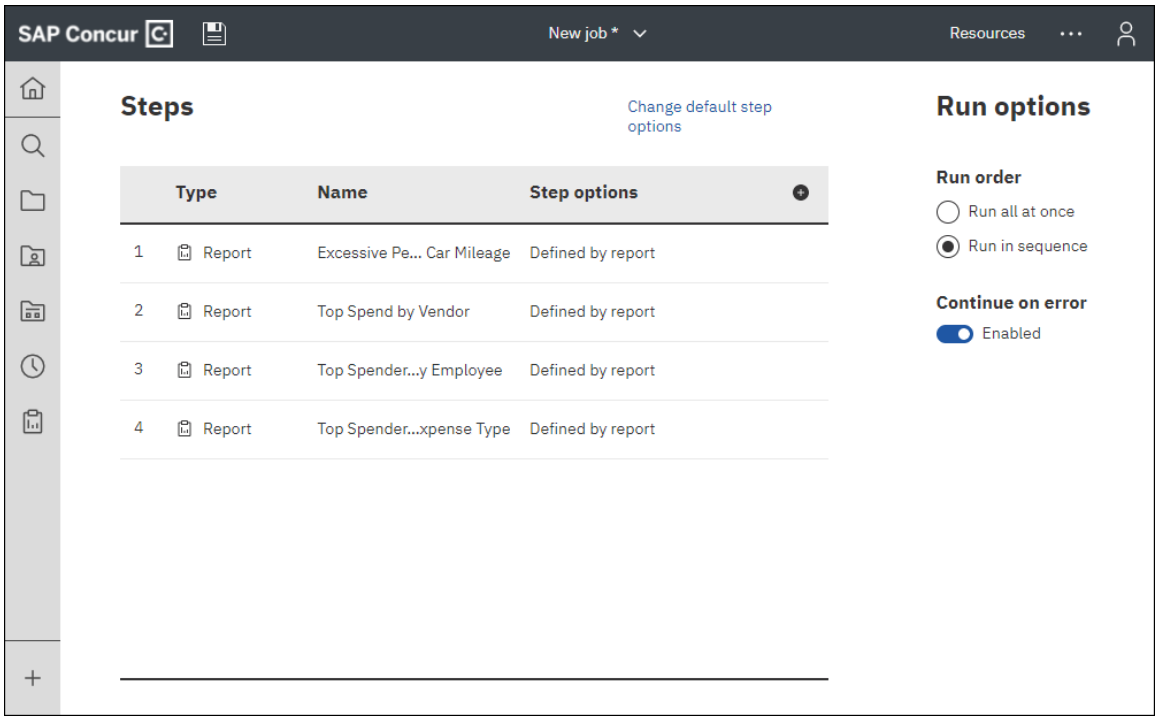
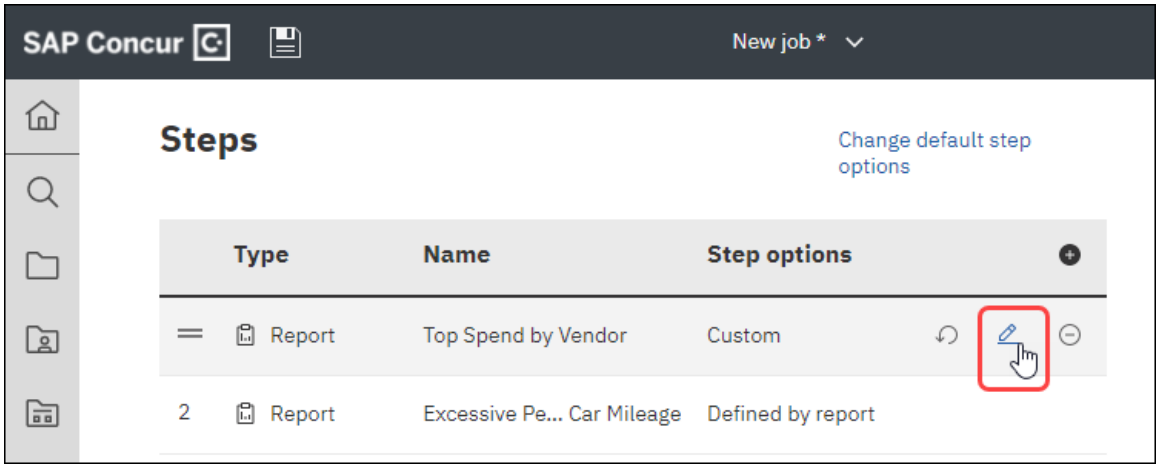
The reports, report views, and/or other jobs you selected are displayed in the **Steps** section. To add additional steps to the job, click the **Add job step** icon, .



You can change the order of the steps by dragging and dropping the steps into the order you want.

NOTE: It is best practice to run the steps of a job in sequence. To run the steps in sequence, click the **Run in sequence** option under **Run options**.

To edit the options for a report, report view, or other jobs assigned to the job, place your cursor over the step and then click the **Edit options** icon, .



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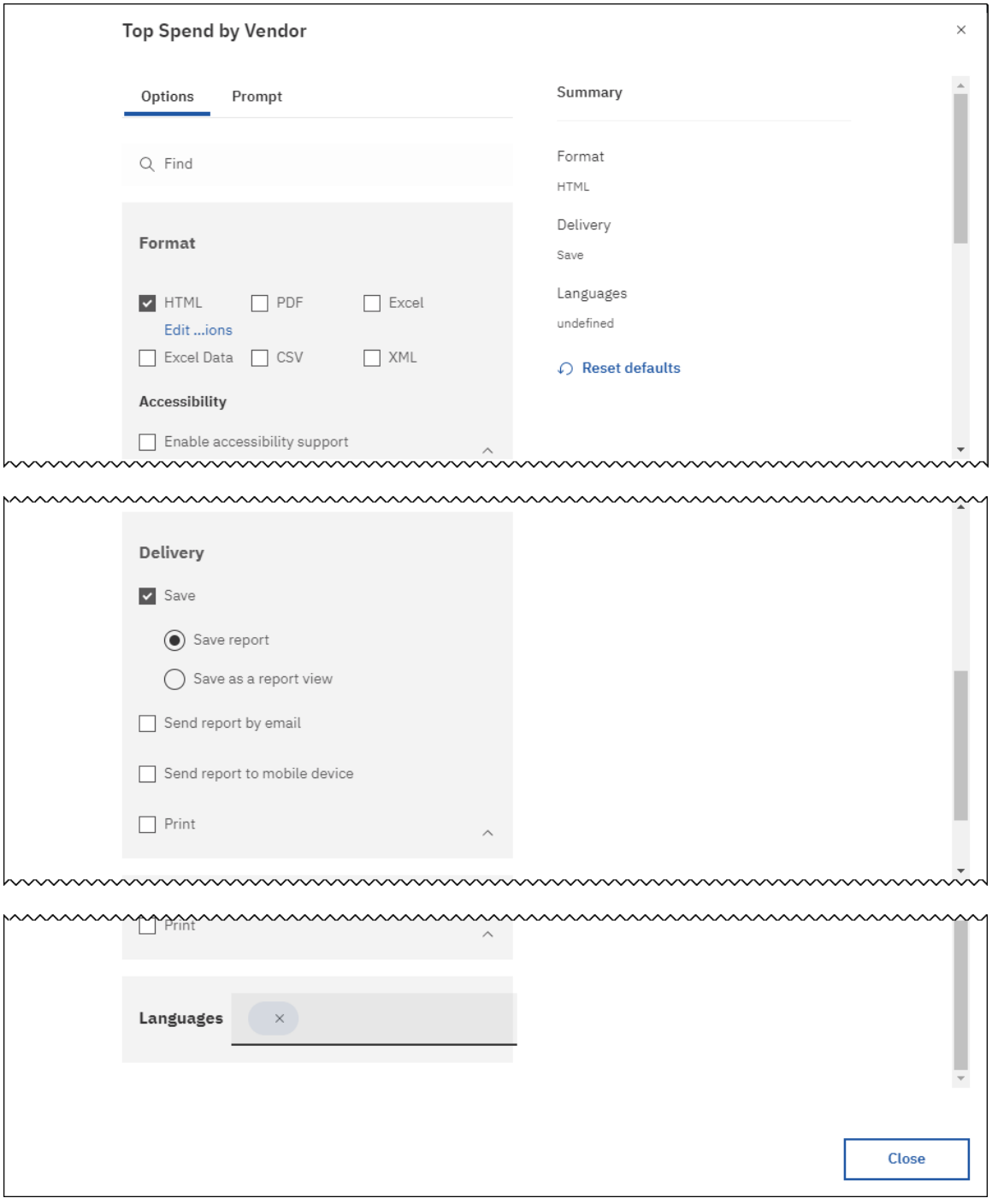
Clicking the **Edit options** icon, , opens the step options dialog.



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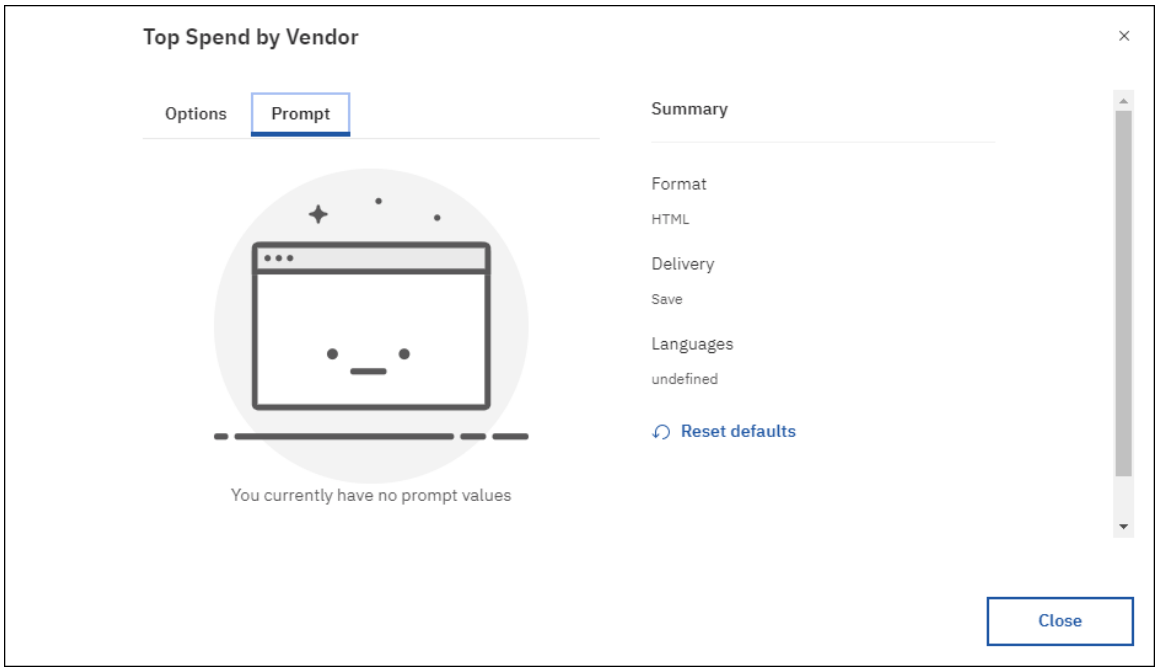
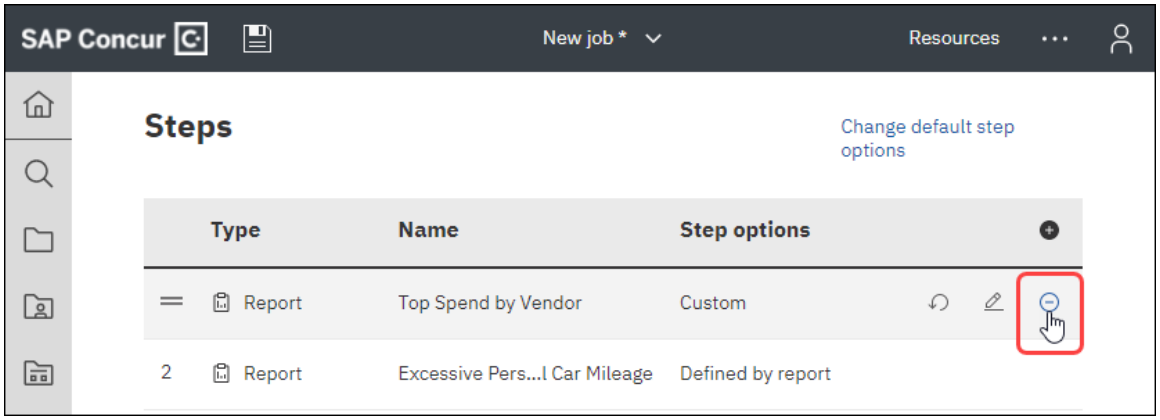
For reports, click the **Prompt** tab to modify the default report prompts for the job step.



Modify the step options and then click **Close** to save your changes.

To remove a step from a job, place your cursor over the step and then click the **Remove job** step icon, .



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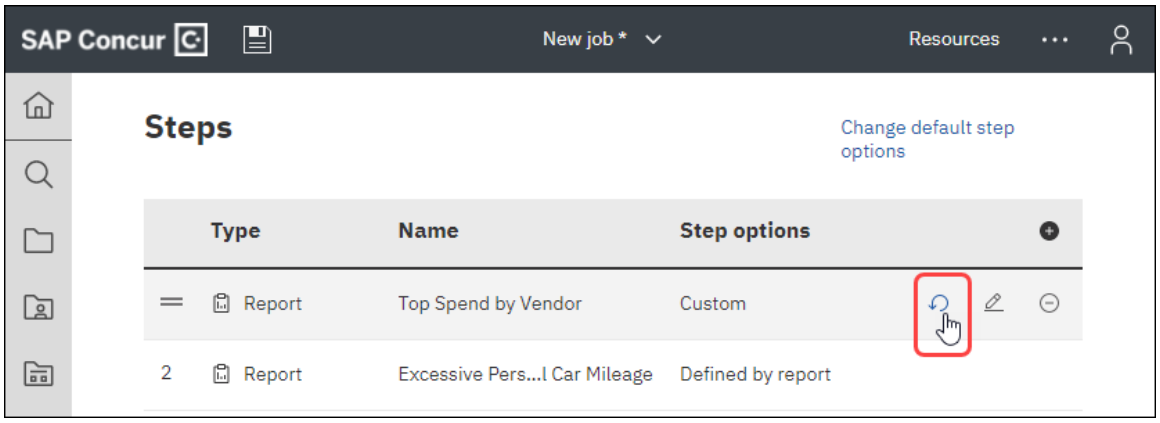
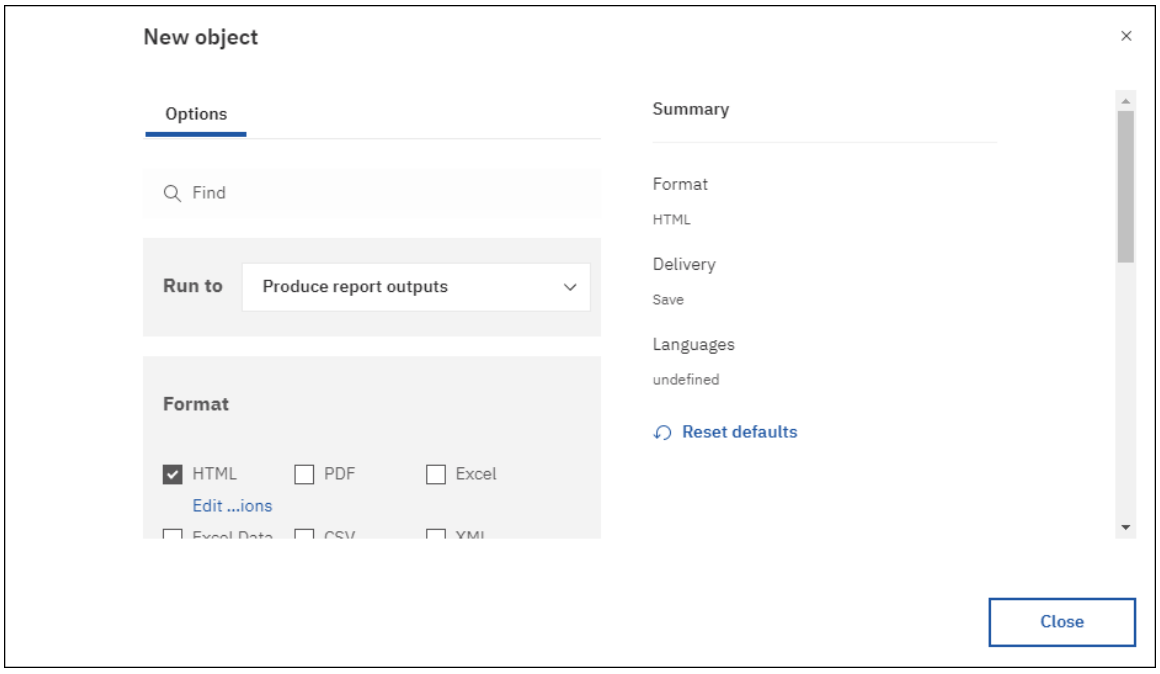
If you modified the default option for a report, report view, or other jobs assigned to the job and want to revert it back to its default settings, place your cursor over the step and then click the Reset options to default icon, .



To modify the default step options for the jobs, click the **Change default step options** link.

Clicking the **Change default step options** link opens the default step options dialog for the job.



Modify the default step options and then click **Close** to save your changes.

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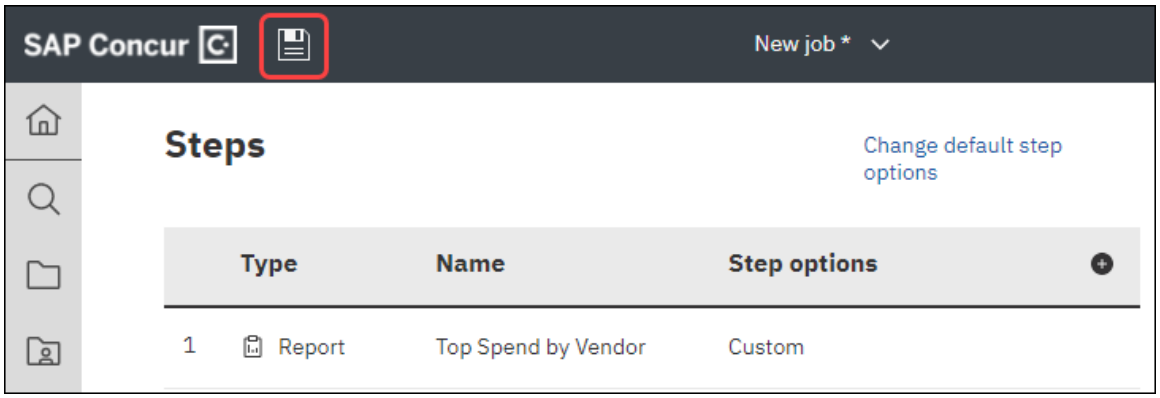
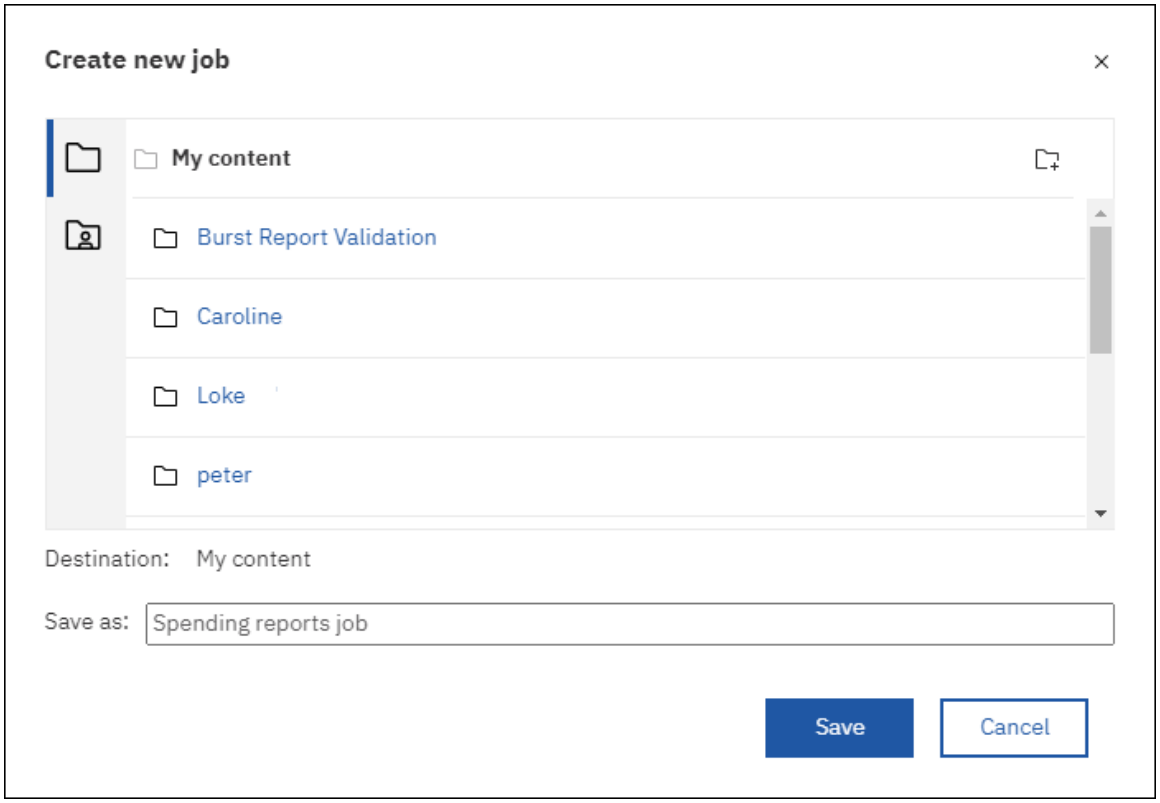
To save the job, click the **Save** icon, , on the top navigation bar.



Clicking the **Save** icon opens the **Create new job** dialog. Navigate to where you want to save the job, enter the job name, and then click the **Save** button.



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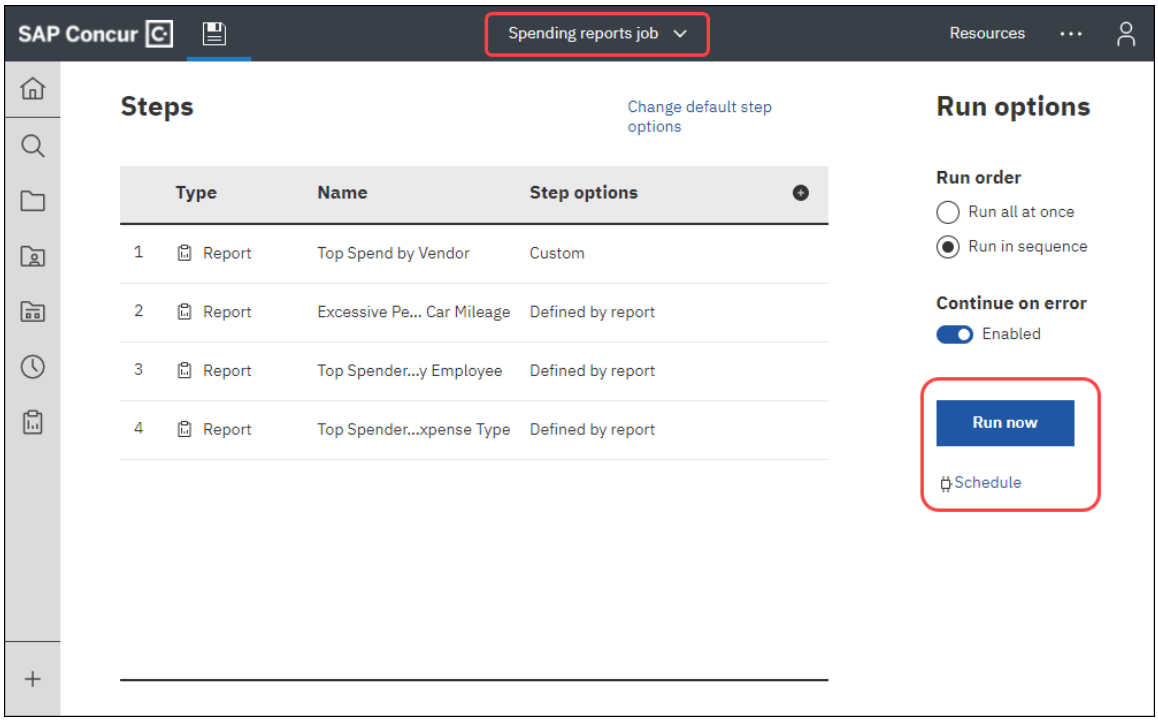
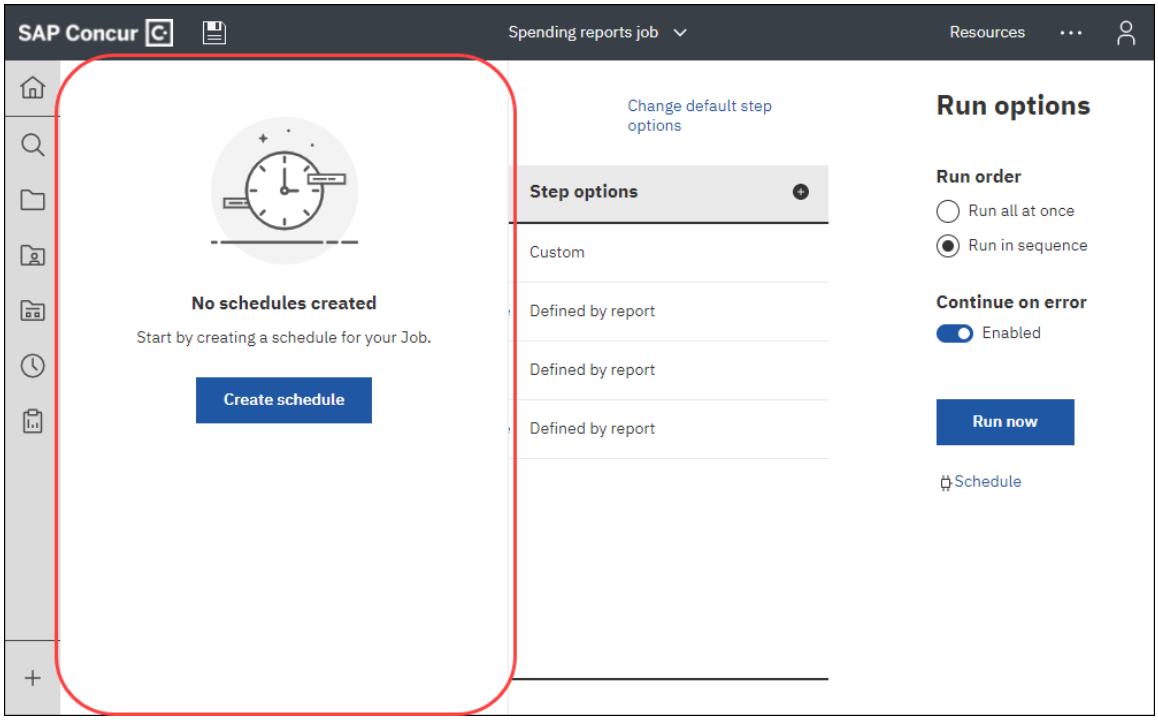
After saving the job the job name is displayed on the top navigation bar, and the **Run now** button and **Schedule** link are displayed for the job.



If you want to schedule the job, click the **Schedule** link to open the schedule pane.



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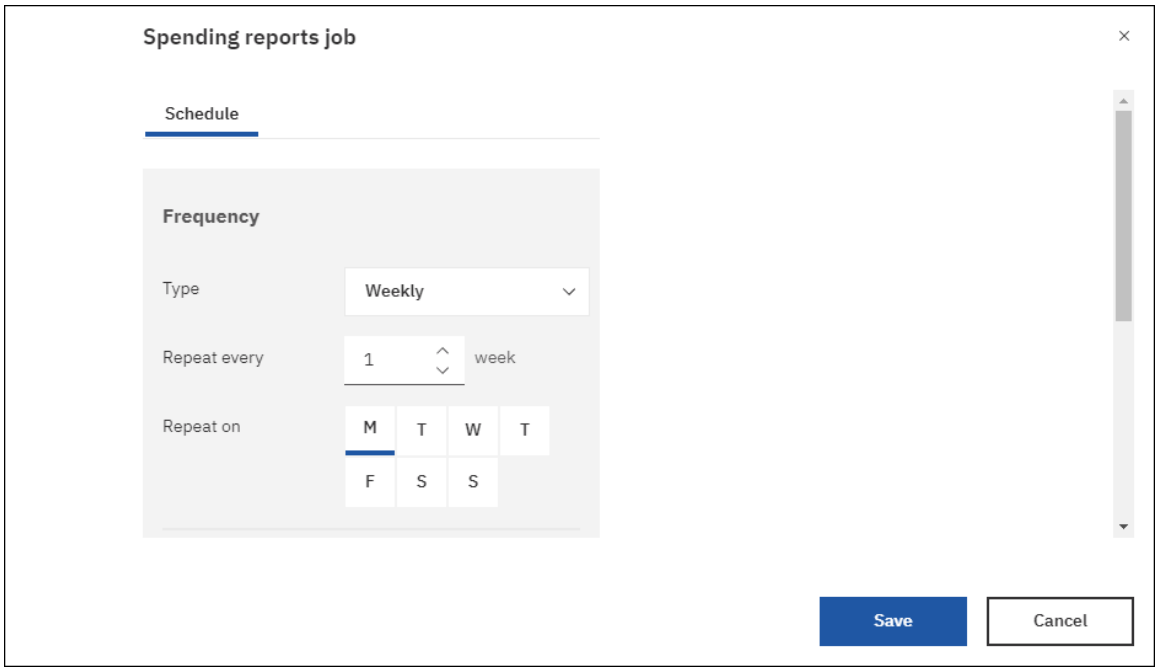
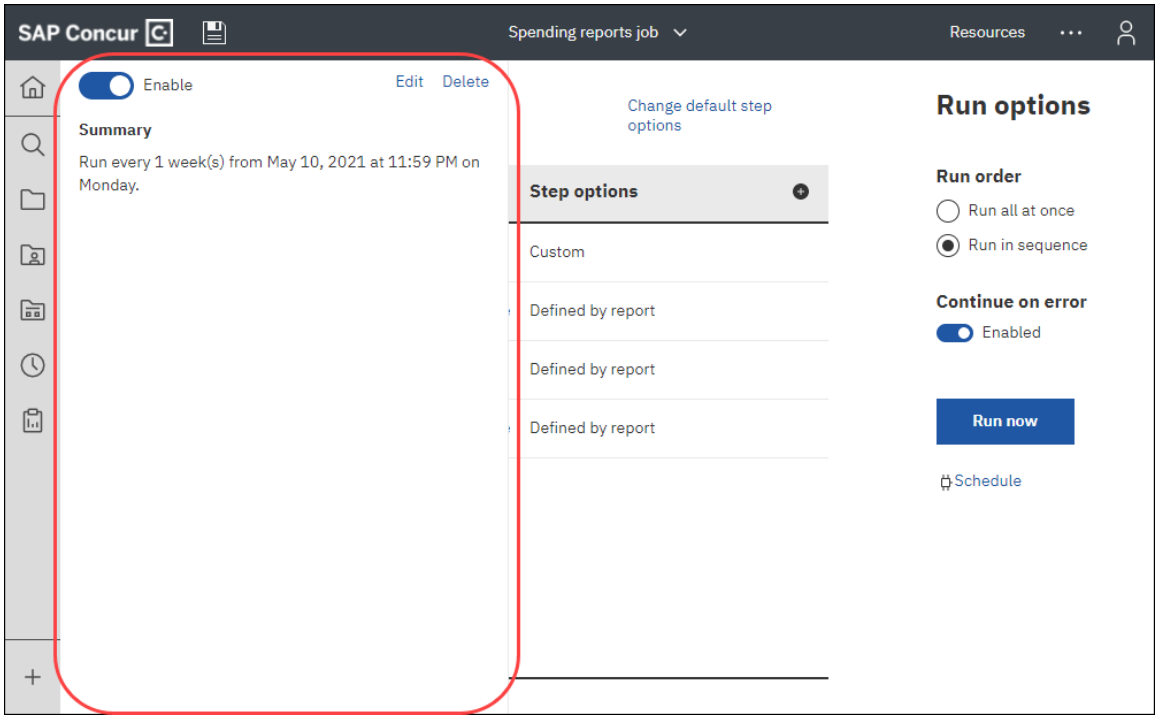
Click the **Create schedule** button to open the schedule dialog for the job. Define the job schedule and then click **Save**.



Once you define the schedule for a job, clicking the **Schedule** link opens the schedule pane with the job's current schedule information.



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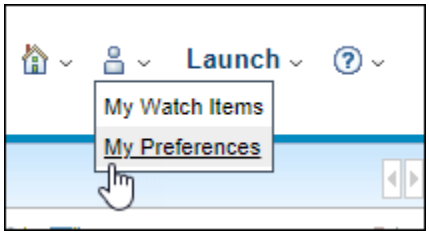
Section 14: My Preferences

My Preferences is now located on the **Personal** menu on the top navigation bar in Cognos 11. In Cognos 10, My Preferences is located on the **My Area Options** menu.

Cognos 10 UI

On the **My Area Options** menu, , click **My Preferences**.



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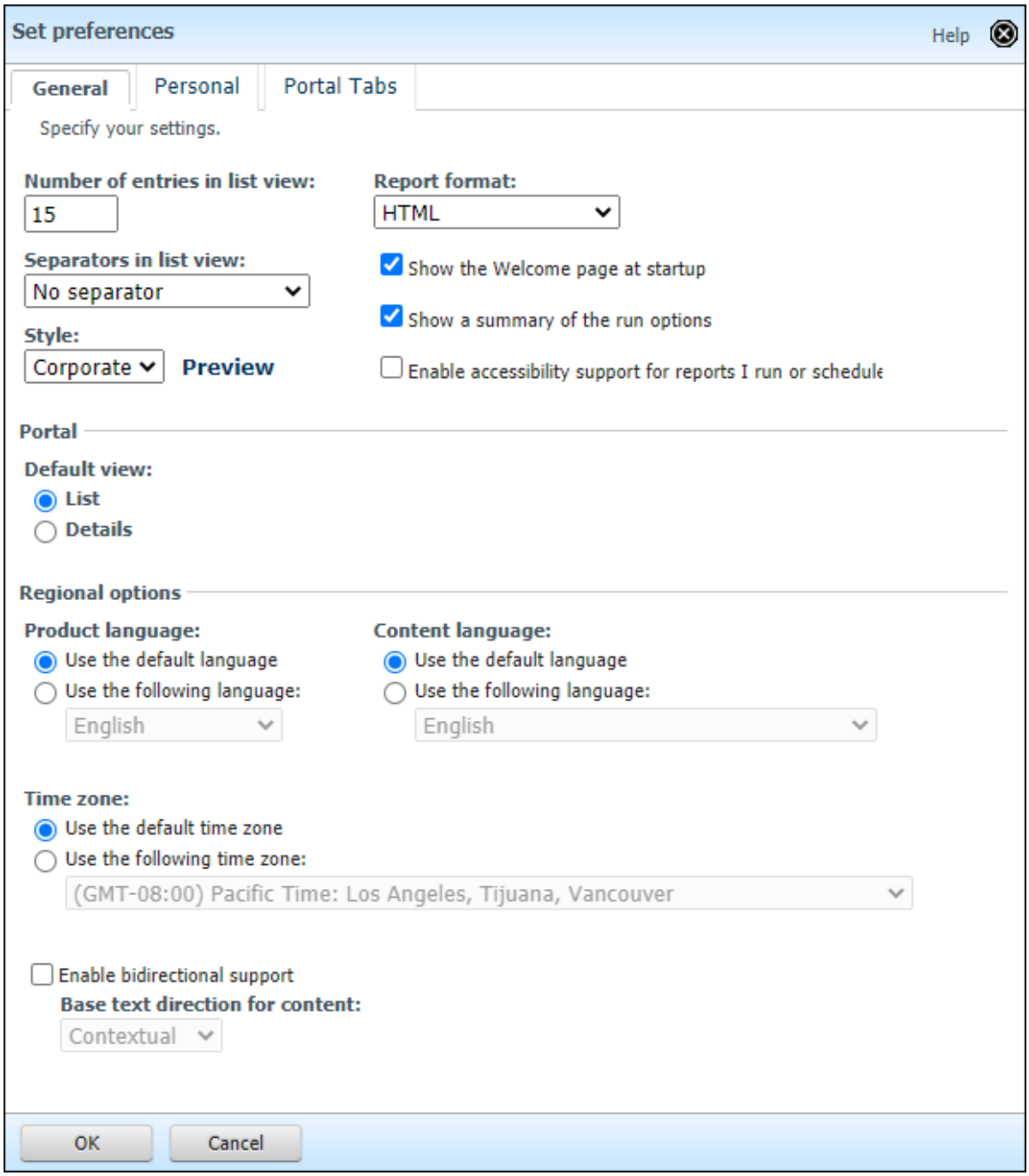
Clicking **My Preferences** opens the **General** tab on the **Set preferences** page.



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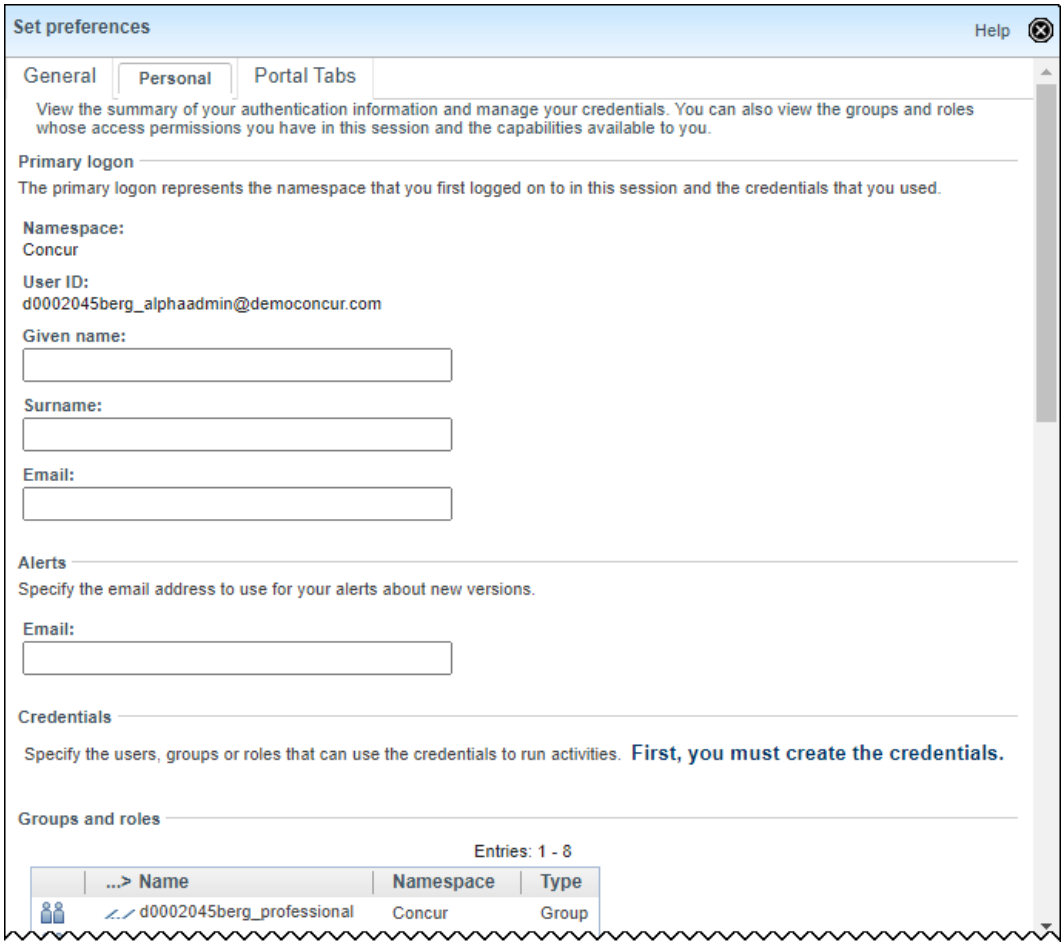
Example of the preference settings on the **Personal** tab.



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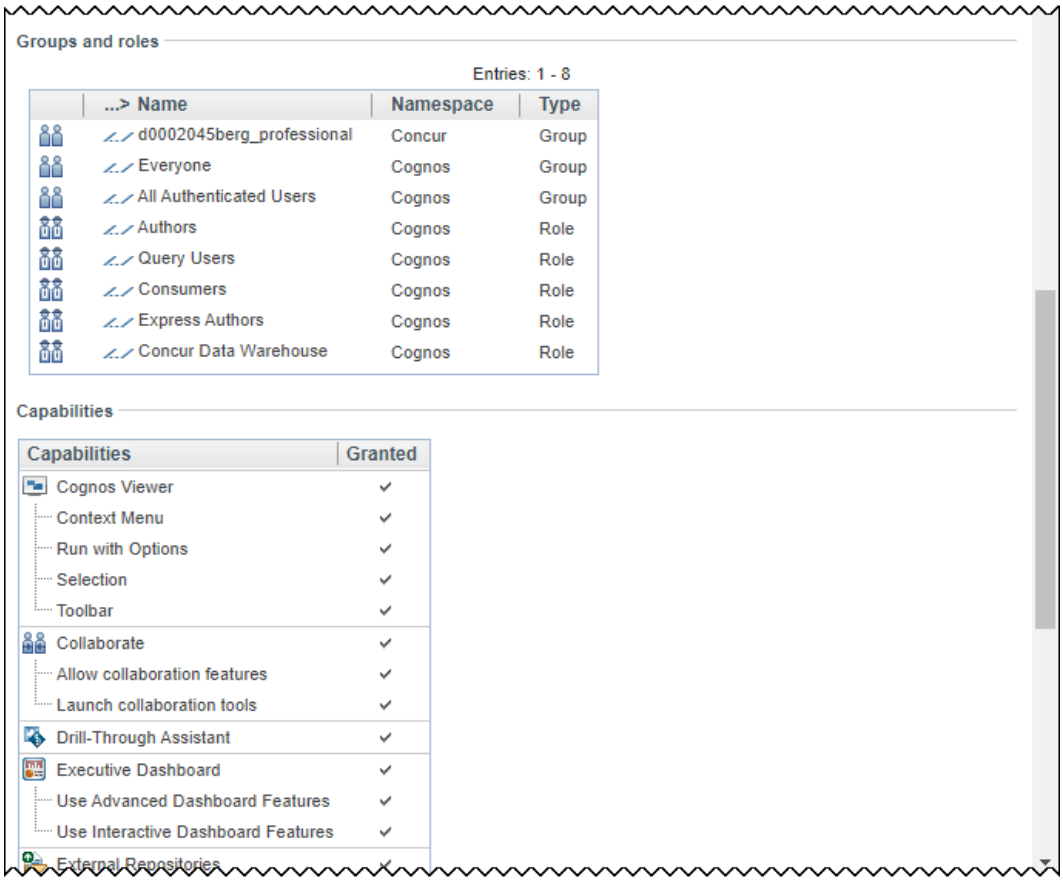

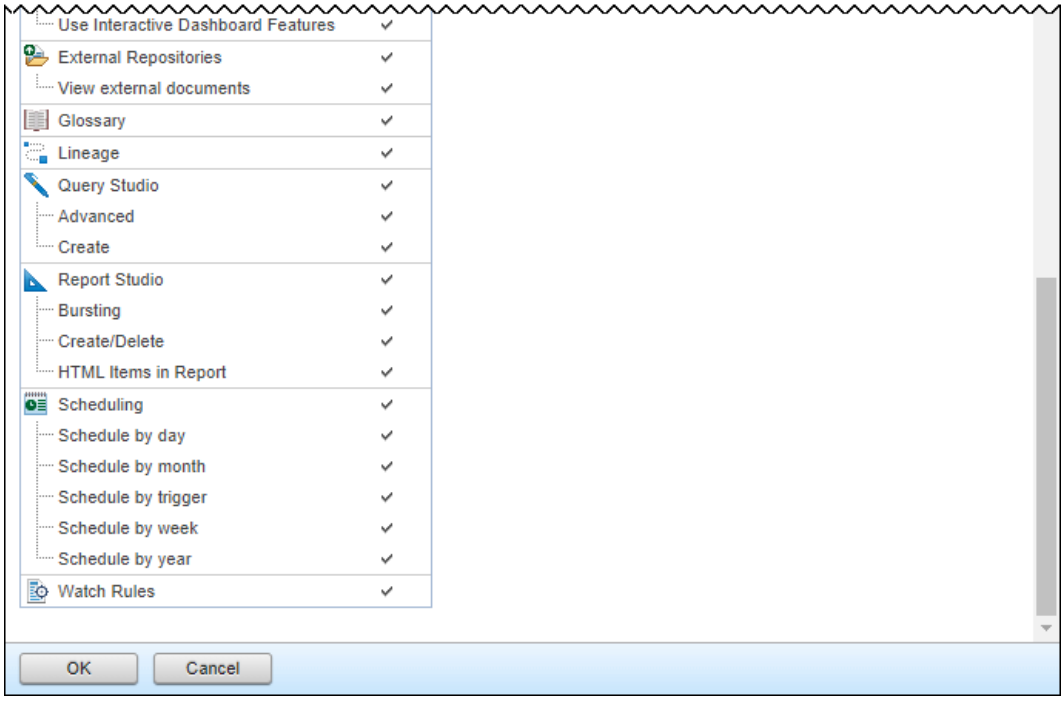

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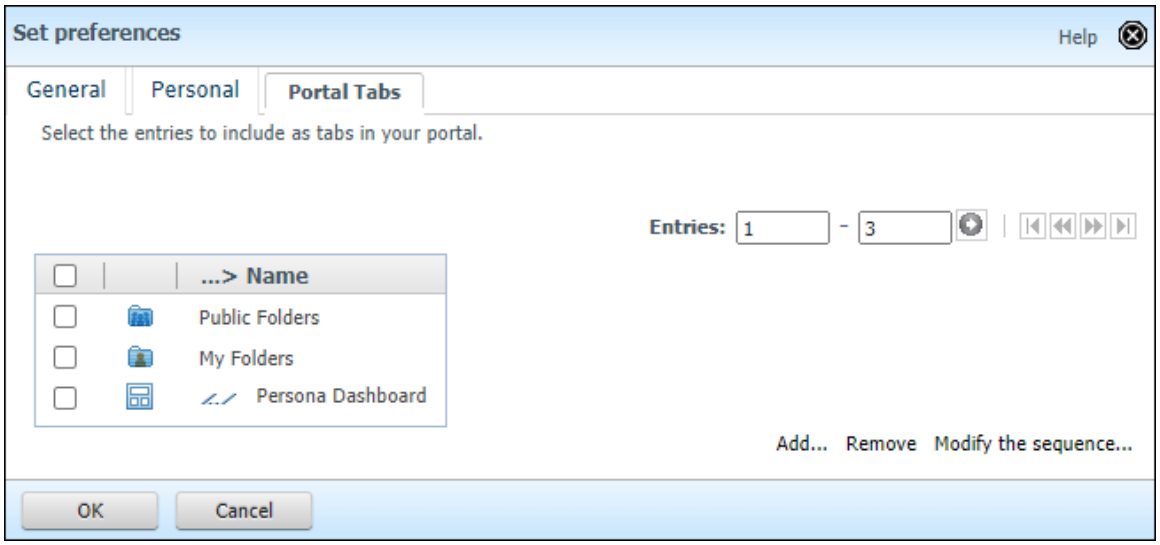
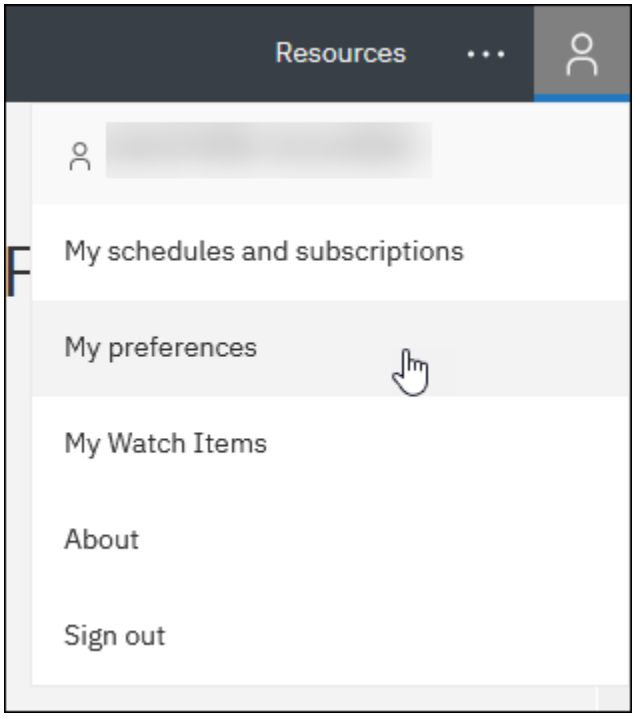
Example of the preference settings on the **Portal Tabs** tab.



Cognos 11 UI

On the **Personal** menu, click **My Preferences**.



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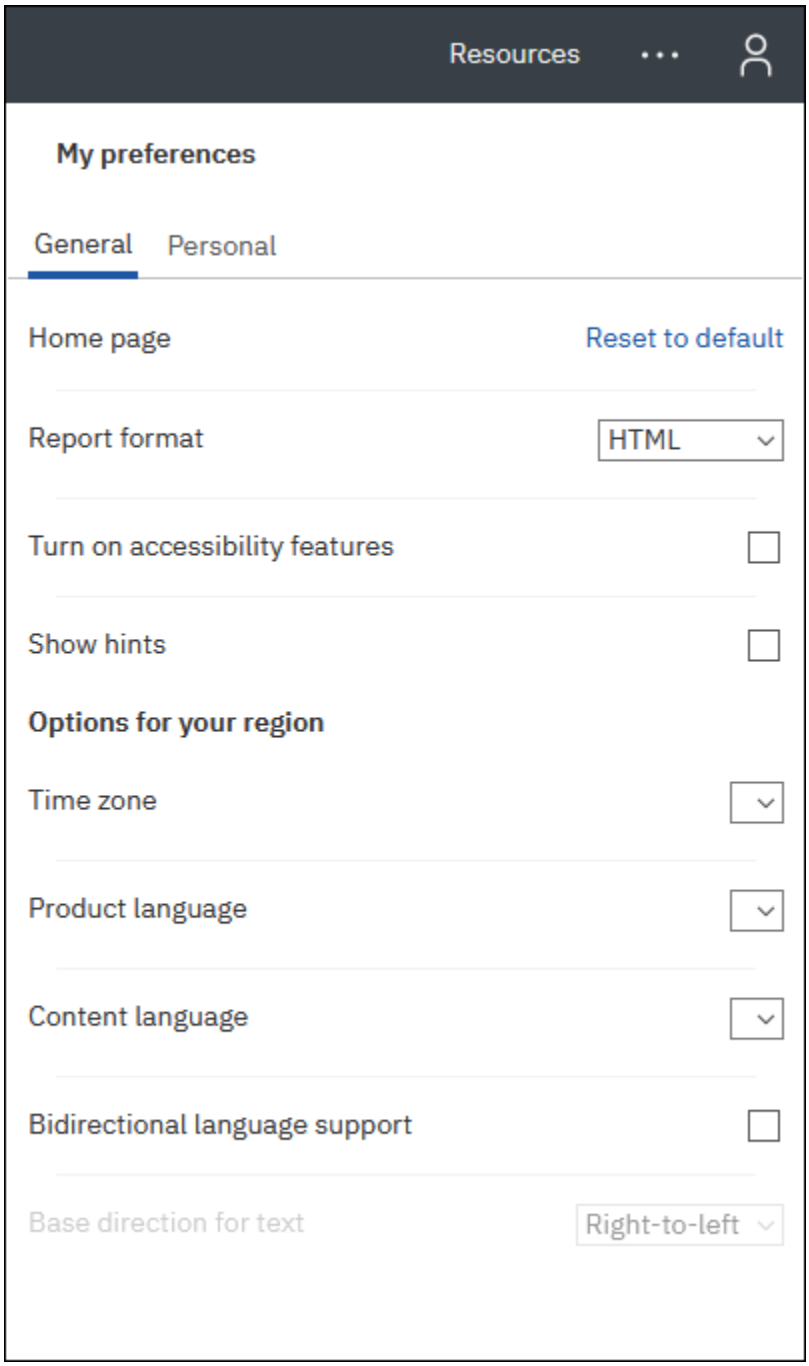
Clicking **My Preferences** opens the **General** tab on the **My preferences** pane.



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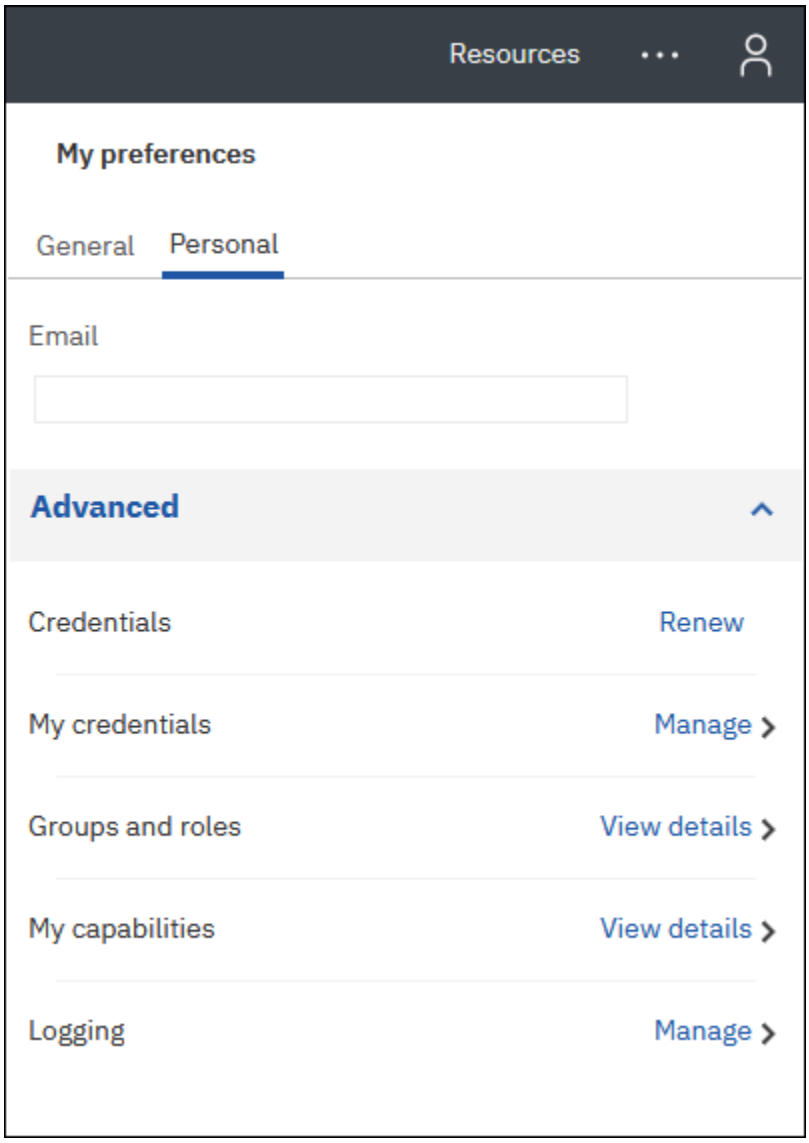
Example of the preference settings on the **Personal** tab.



NOTE: In Cognos 11, IBM has identified a known issue regarding the **Email** field on the **Personal** tab. Email addresses entered in the **Email** field cannot be saved. Do not use the **Email** field at this time.

For the preference settings under **Advanced** on the **Personal** tab, click the link next to the advanced preference setting name to manage or view more information about the setting.

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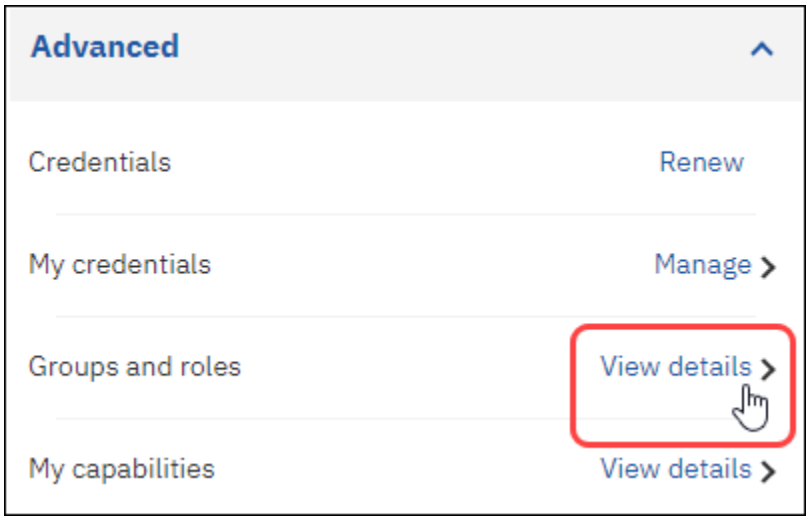
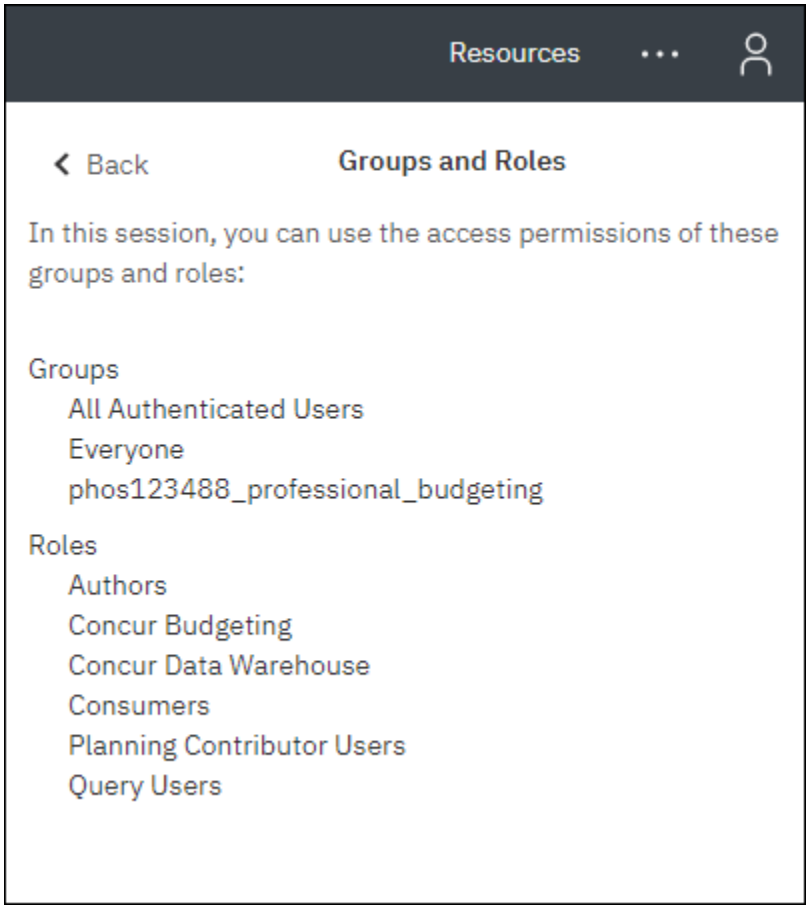
For example, to view more information about the **Groups and roles** setting, click the **View details** link.



Clicking the **View details** link opens the **Groups and Roles** pane.



Click **Back** to return to the **Personal** tab.

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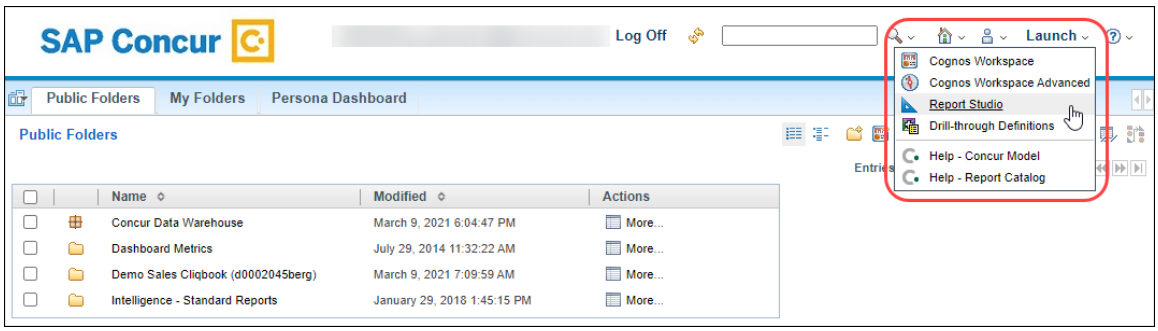
Section 15: Report (Formerly Report Studio)

In Cognos 11, Report Studio has been renamed to Report. Report is used by report developers and authors to create new and manage existing custom reports and report templates. While the location of Report and the look of the UI for Report has changed in Cognos 11, the functionality is essentially the same between Cognos 10 and Cognos 11.

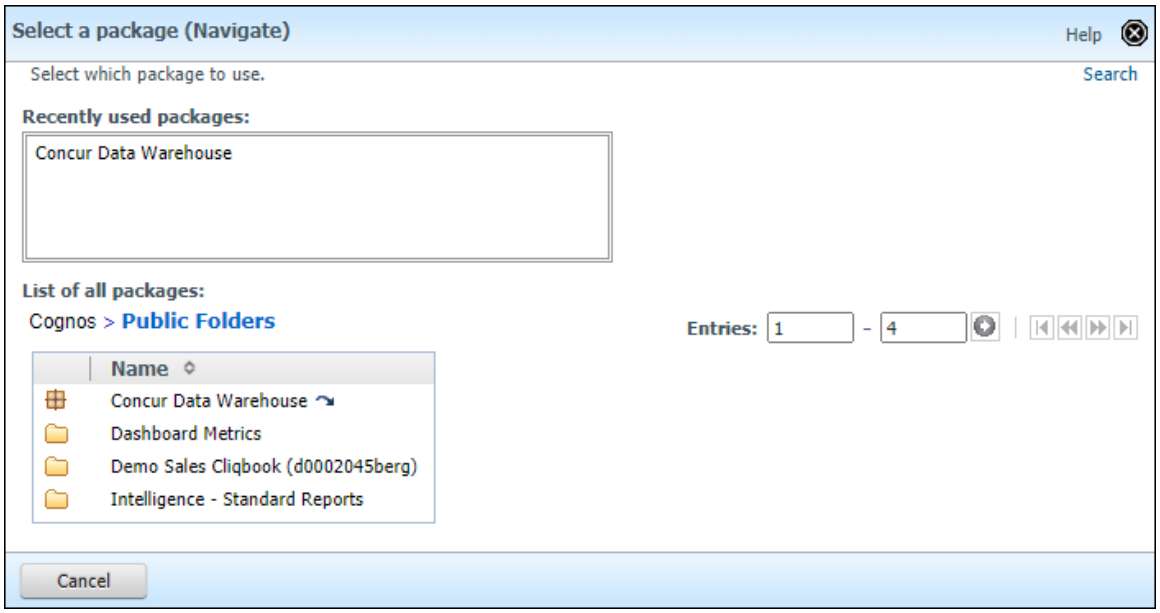
One new feature that is now available in Cognos 11 is the ability to search the Concur Data Warehouse.

Cognos 10 UI

Report Studio is accessed from the **Launch** menu at the top of the page by clicking **Launch > Report Studio**.



Clicking **Report Studio** opens the **Select a package (Navigate)** dialog. Select the **Concur Data Warehouse** package.



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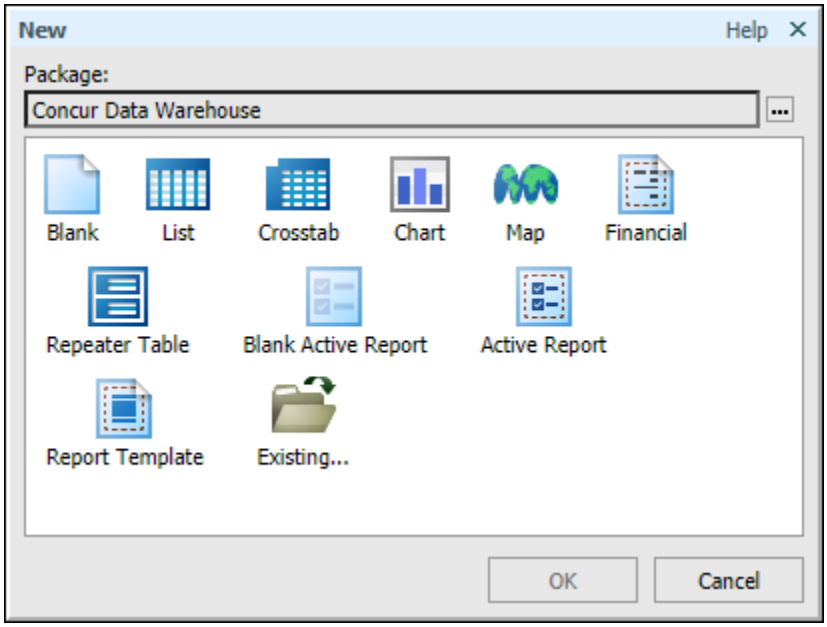
Clicking the **Concur Data Warehouse** package opens the following dialog.

To create a new report or template, click **Create new**. In the **New** dialog, click the type of report or template you want to create.



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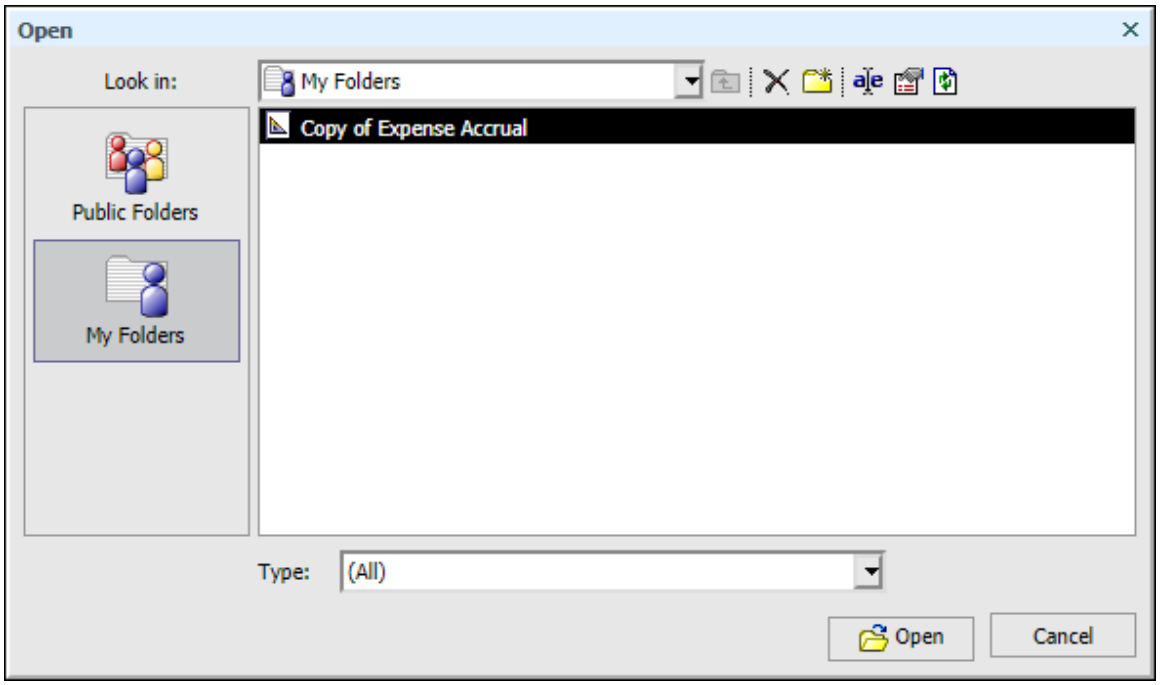
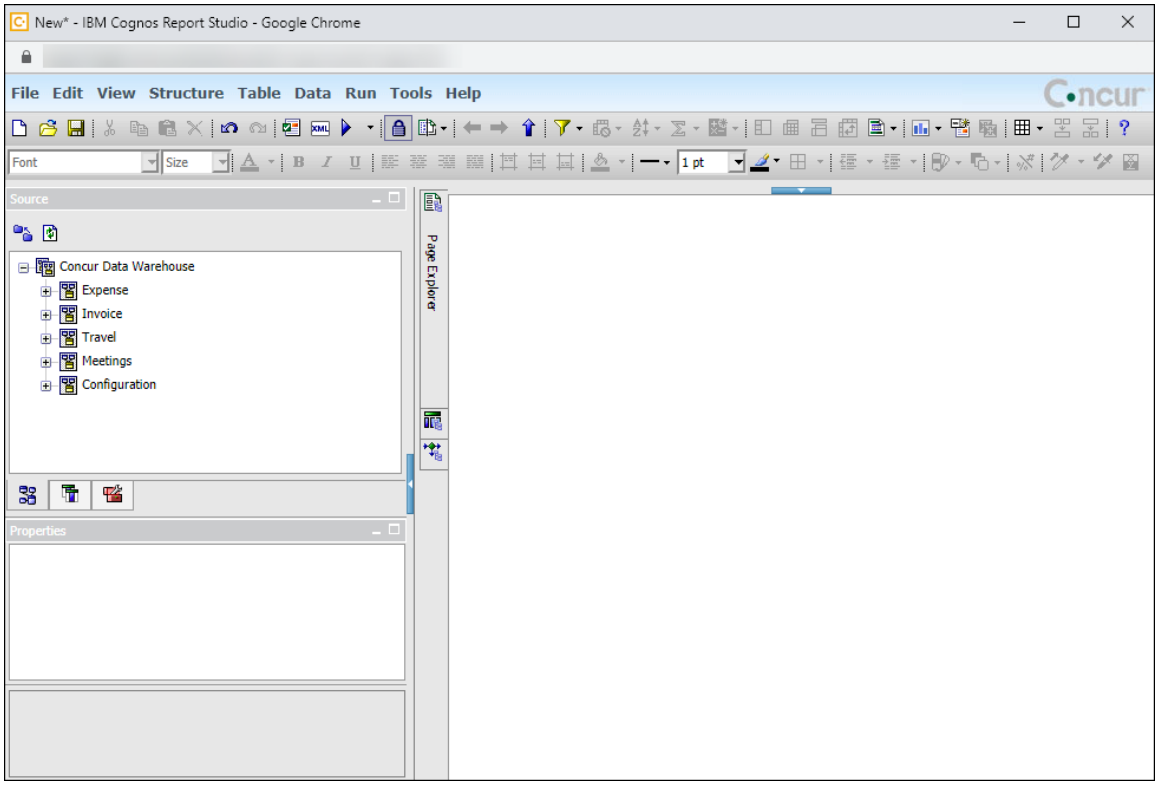
To open an existing report or template, click **Open existing**. In the **Open** dialog, select the report or template you want to open, and then click the **Open**.



The new or existing report or template opens in Report Studio.



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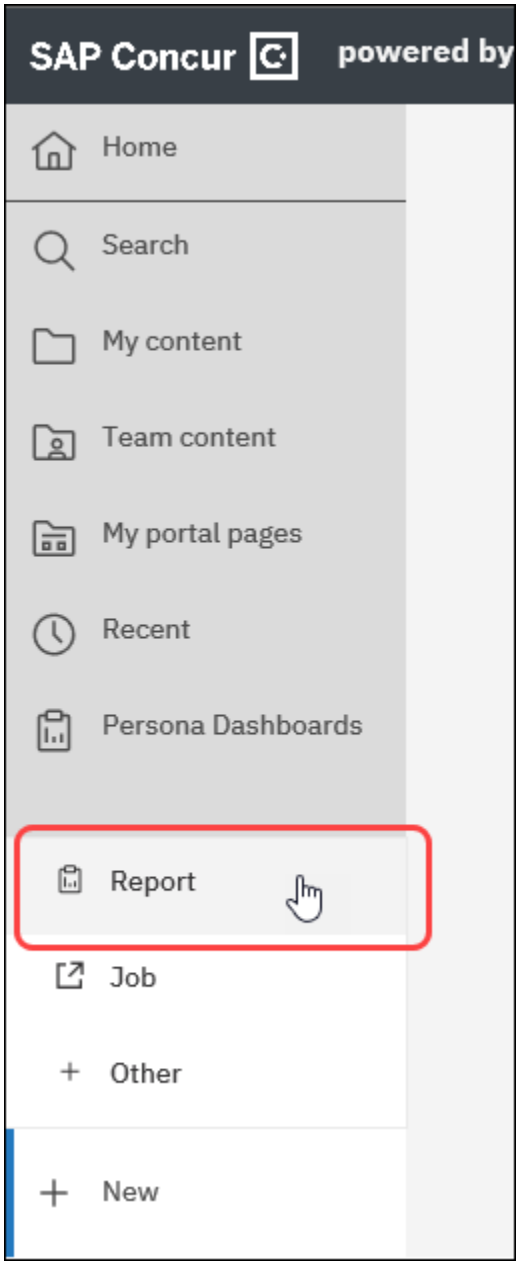
Cognos 11 UI

Report is accessed from the **New** menu on the left navigation pane by clicking **New > Report**.



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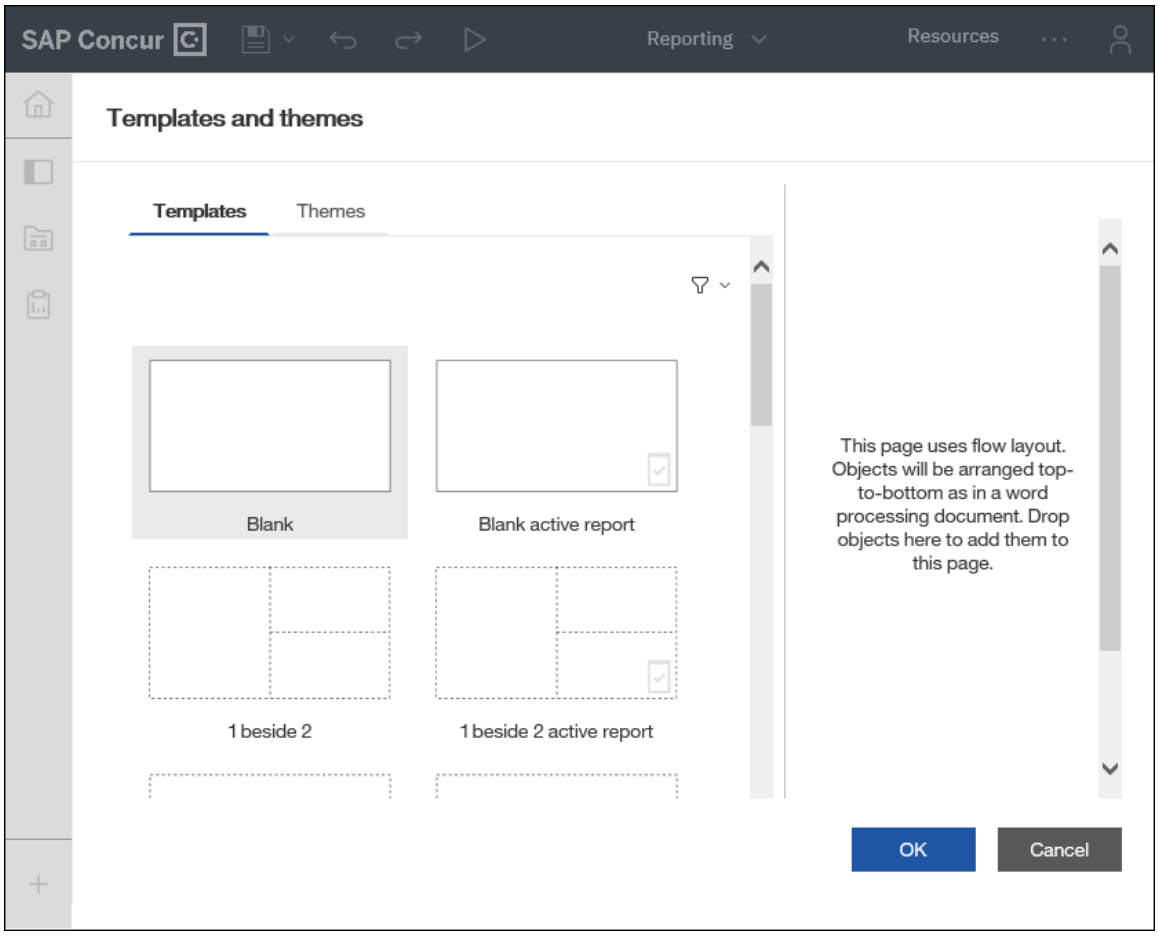
Clicking **Report** opens the **Templates and themes** page. Click the type of report or template you want to create, and then click **OK**.



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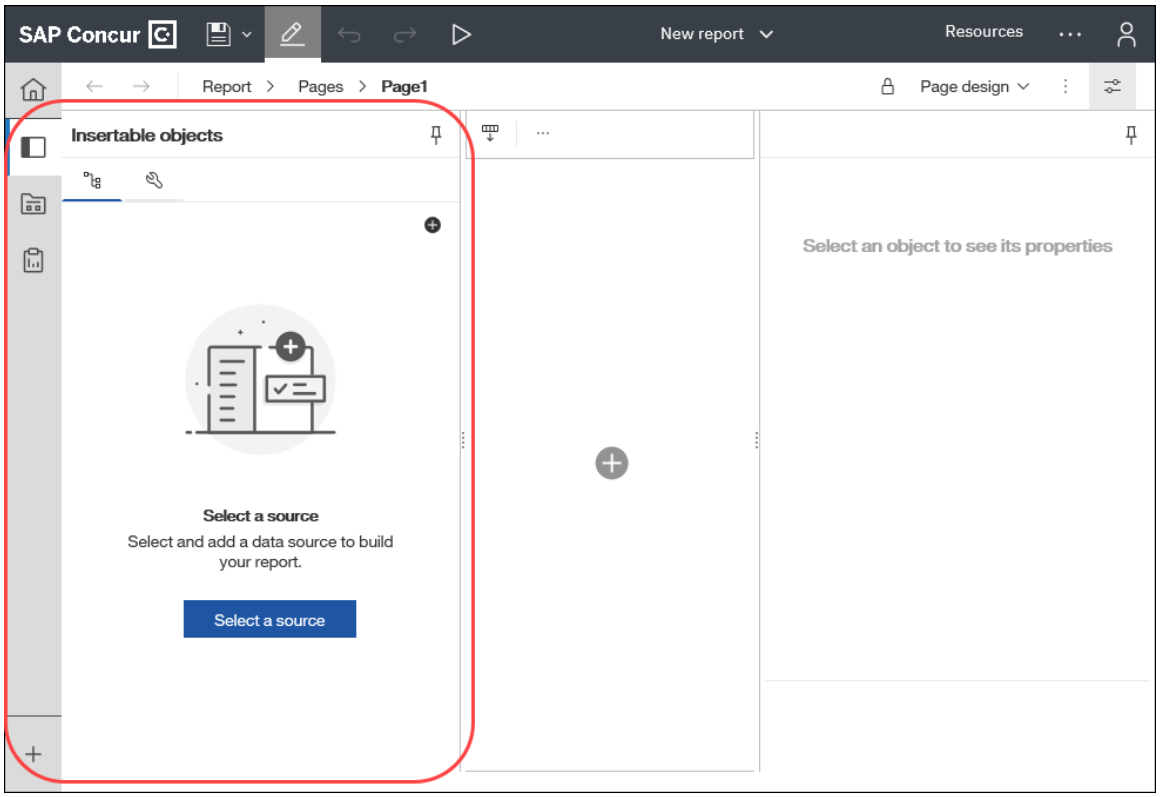
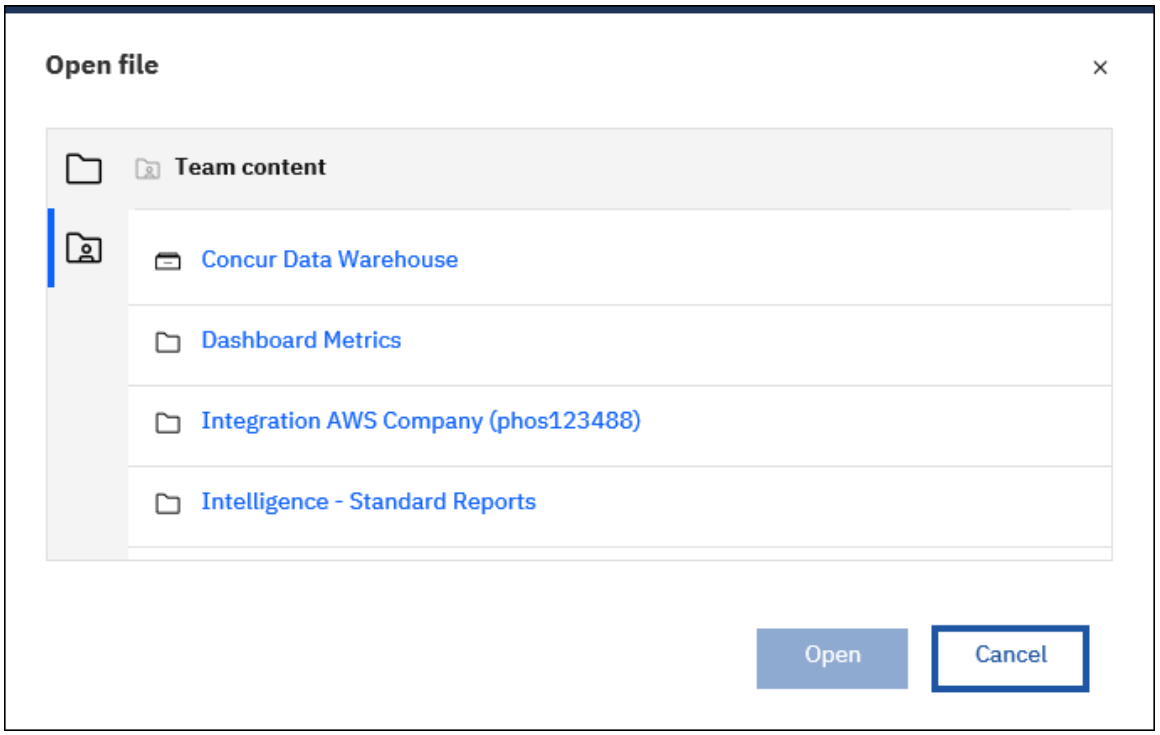
Clicking **OK** opens the **Insertable objects** pane in Report.



Click the **Select a source** button to open the **Open file** dialog.



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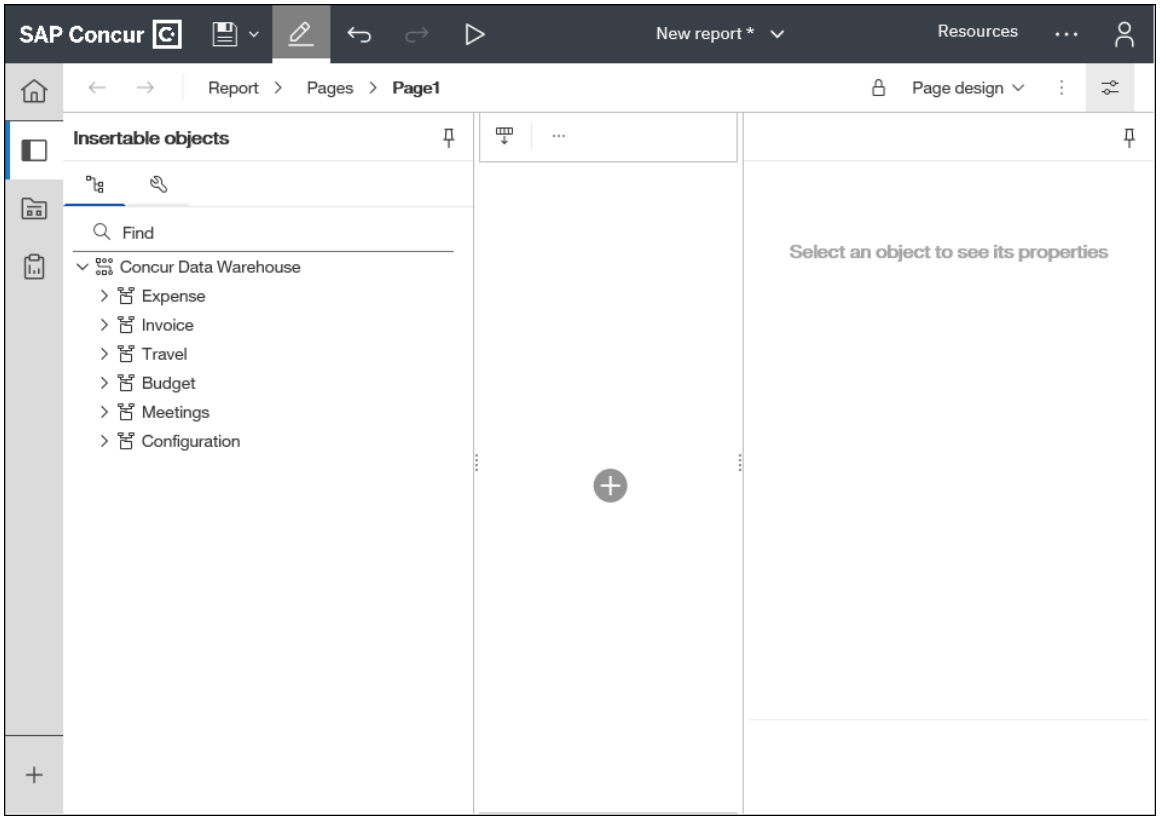
Select the **Concur Data Warehouse** package, and then click **Open**.

If you want to open an existing report or template, navigate to the report or template and then click **Open**.

The new or existing report or template opens in Report.



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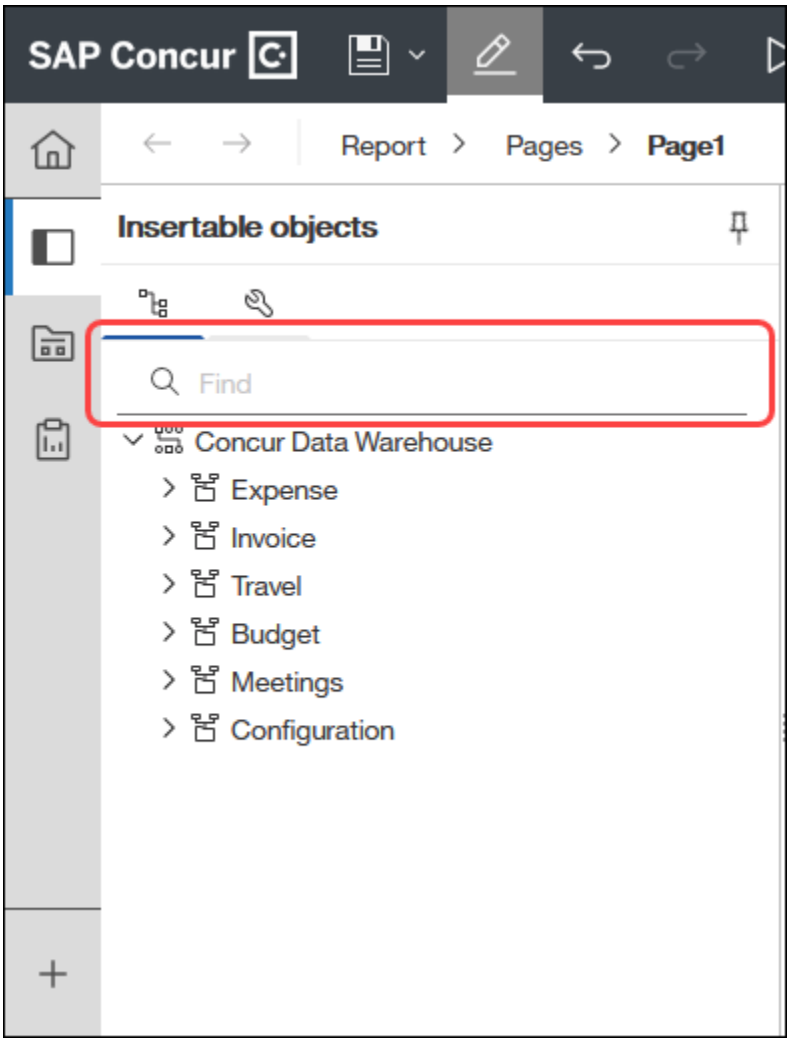
In Cognos 11, you can now search for data elements in the Concur Data Warehouse package and search for report objects from the **Insertable objects** pane in Report.

To search for data elements in Report:

1. After opening the Concur Data Warehouse package, on the **Insertable objects** pane, click the **Sources** tab, .
2. In the search field, enter your search term(s).



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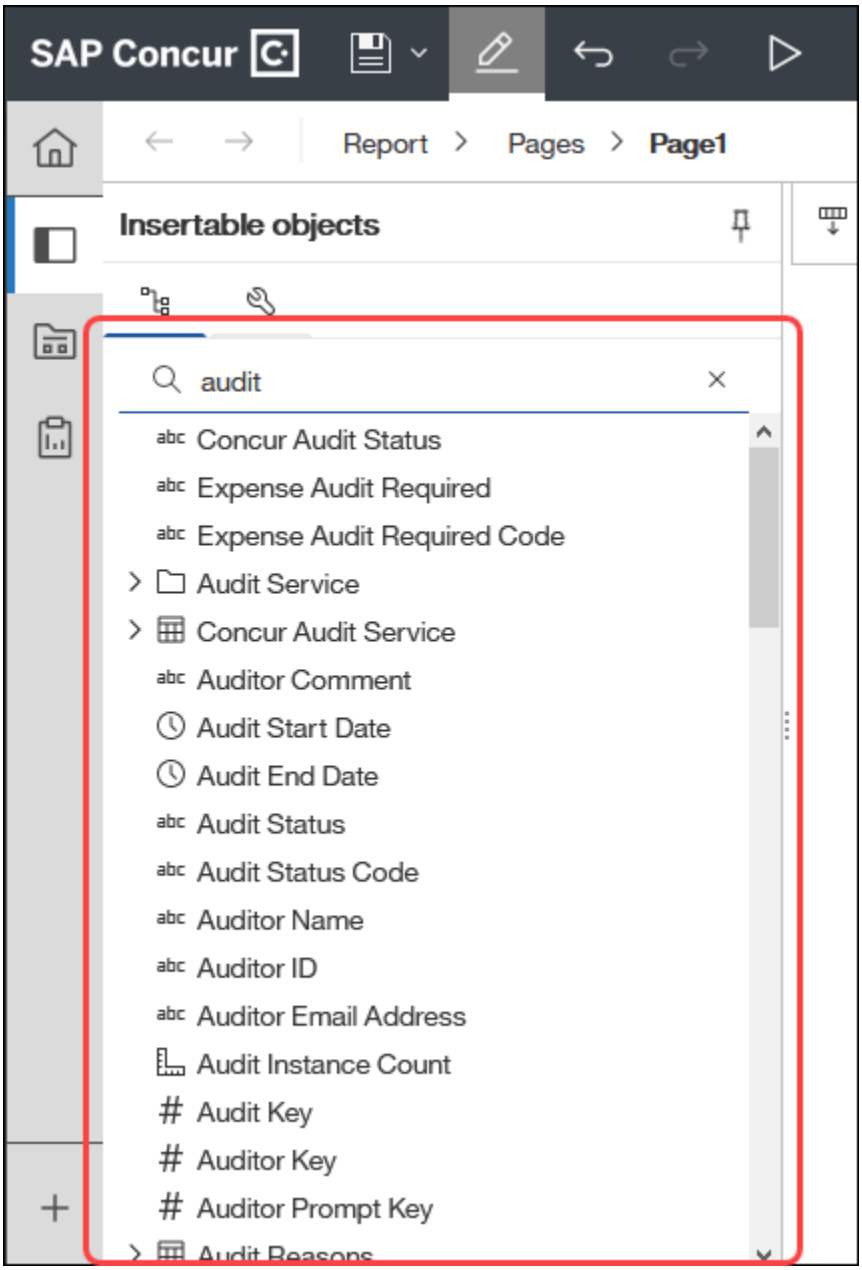
3. As you enter your search term(s), the matching search results are automatically displayed below the search field.



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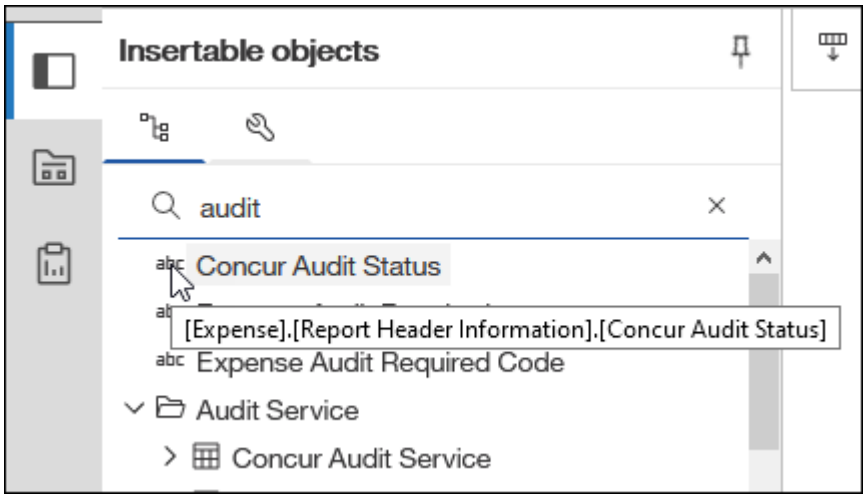
4. To view the data item expression associated with a data element in the search results, place your pointer over the data element.



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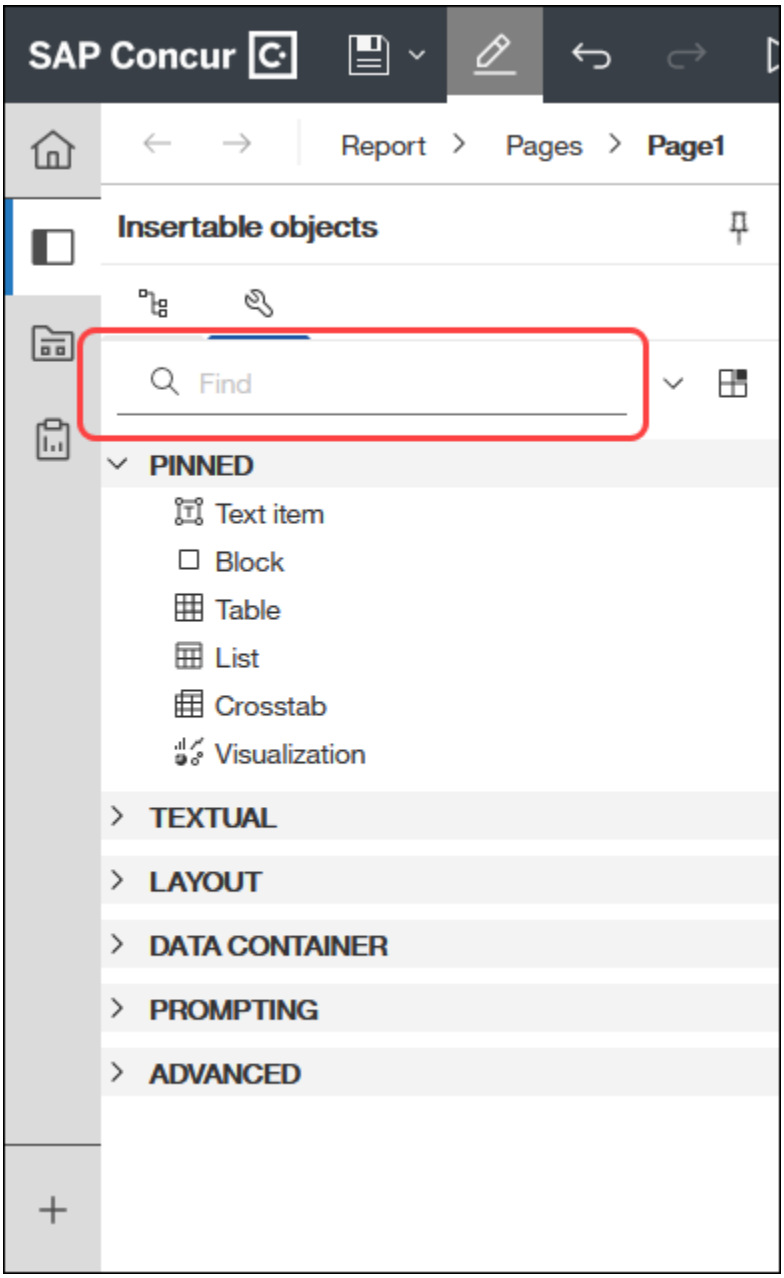
To search for report objects in Report:

1. On the **Insertable objects** pane, click the **Toolbox** tab, .
2. In the search field, enter your search term(s).



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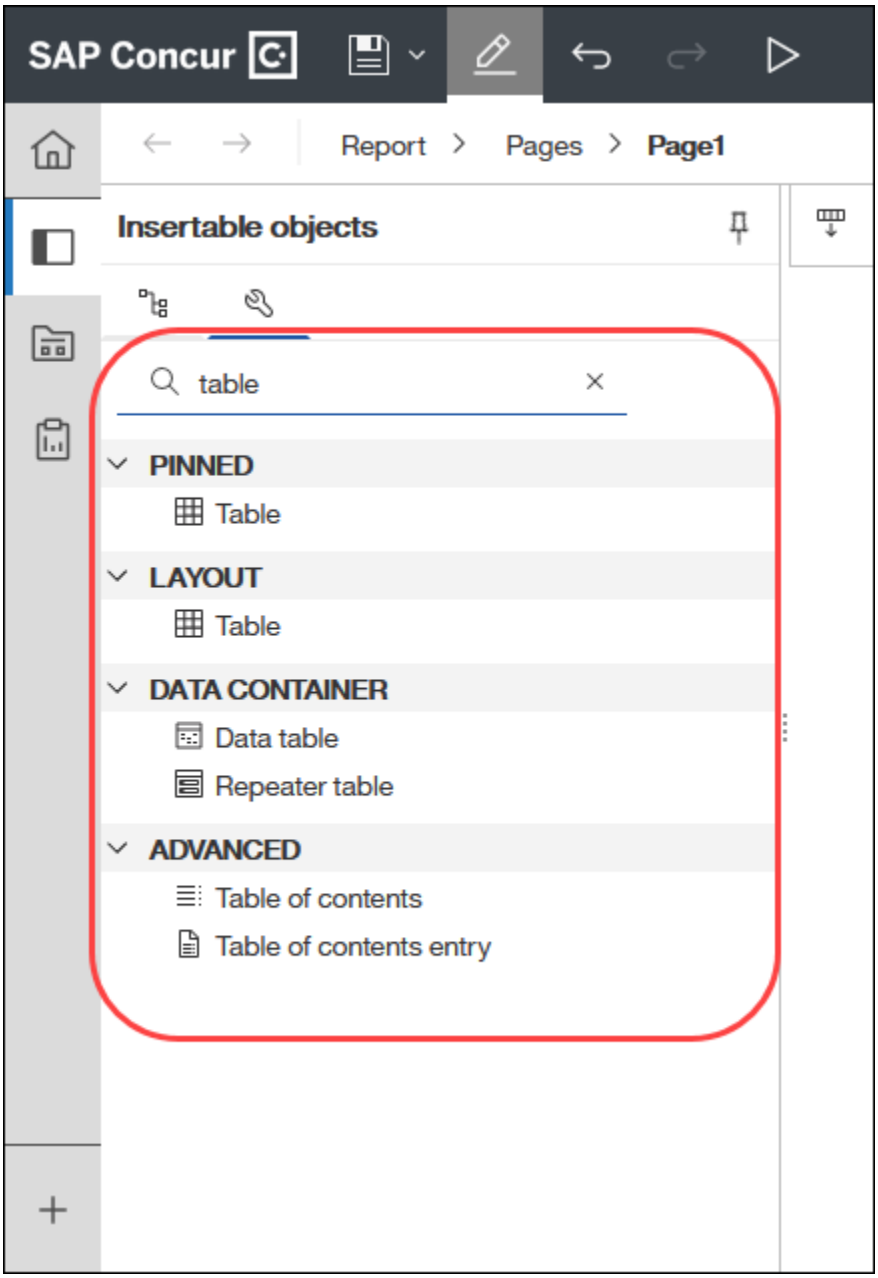
3. As you enter your search term(s), the matching search results are automatically displayed below the search field.



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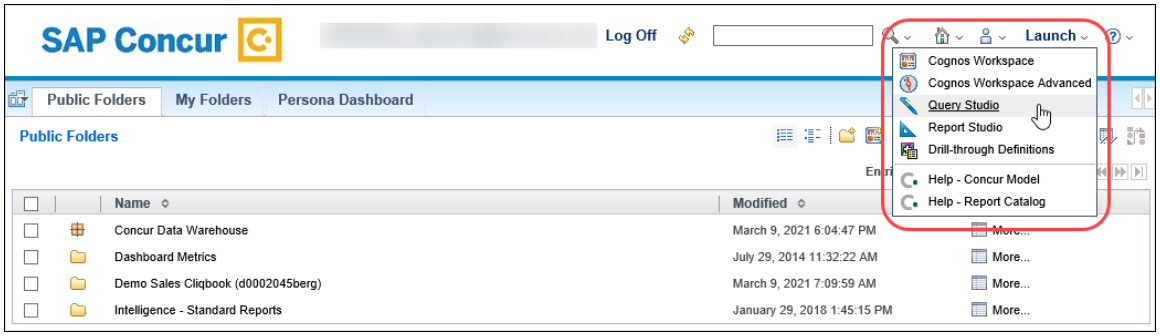
Section 16: Query Studio

Query Studio is used to create simple queries and reports in IBM Cognos Business Intelligence. While the location of Query Studio and the look of the UI for Query Studio has changed in Cognos 11, the functionality is essentially the same between Cognos 10 and Cognos 11.

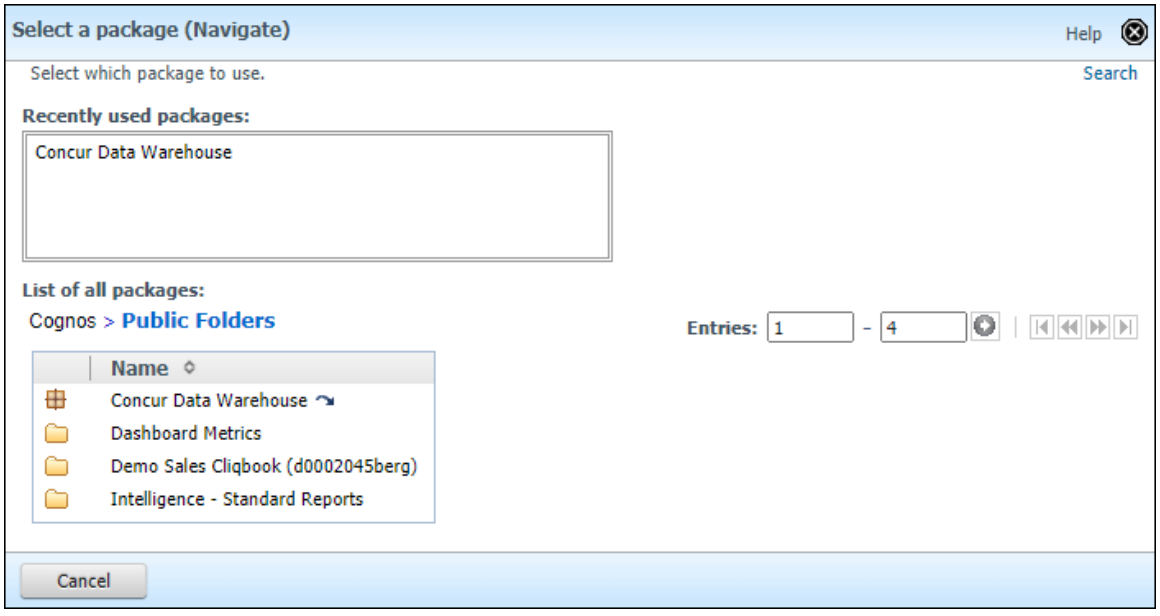
NOTE: In Cognos 11, Query Studio requires the Mozilla Firefox ESR browser. Query Studio does not currently support other browsers, such as Microsoft Edge, Google Chrome, or Apple Safari.

Cognos 10 UI

Query Studio is accessed from the **Launch** menu at the top of the page by clicking **Launch > Query Studio**.



Clicking **Query Studio** opens the **Select a package (Navigate)** dialog. Select the **Concur Data Warehouse** package.



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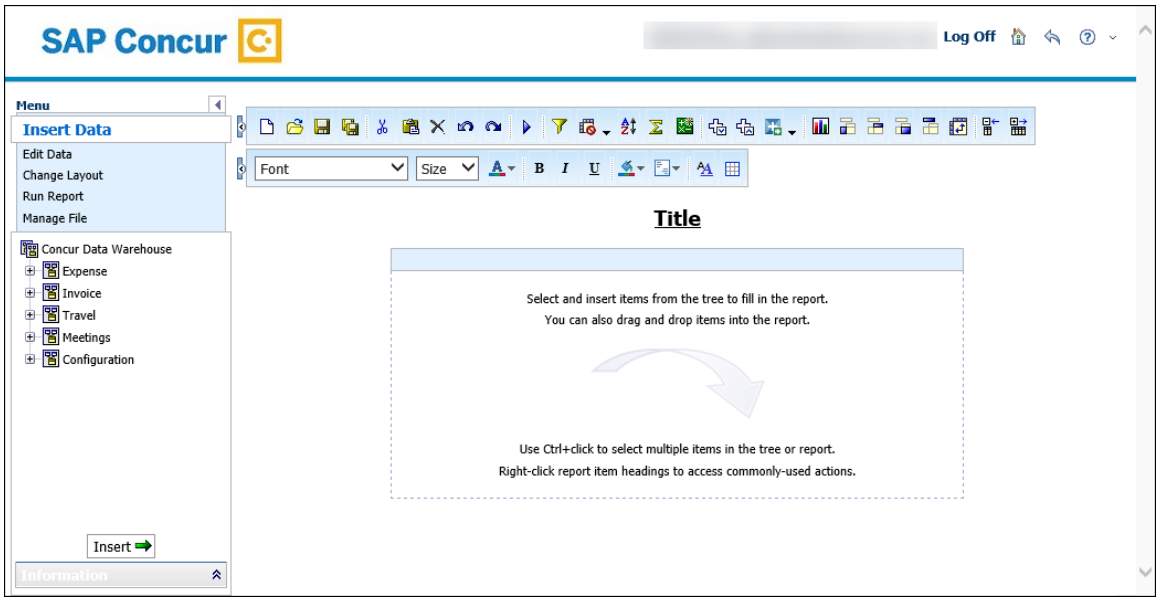
Query Studio opens.



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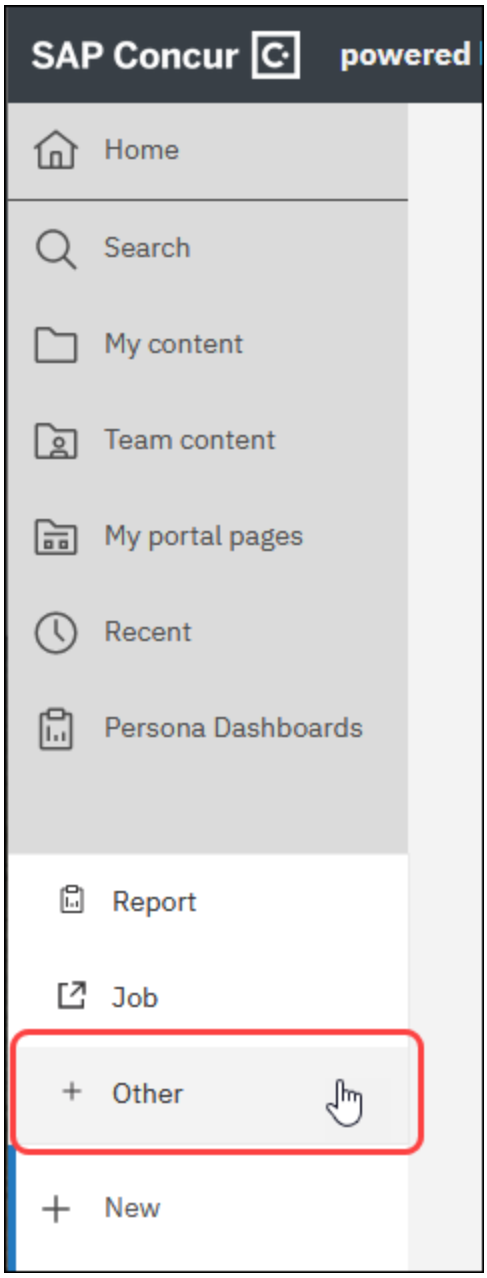
Cognos 11 UI

Query is accessed from the **New** menu on the left navigation pane by clicking **New > Other > Query Studio**.

Clicking **New > Other** opens the **Companion applications** pane.



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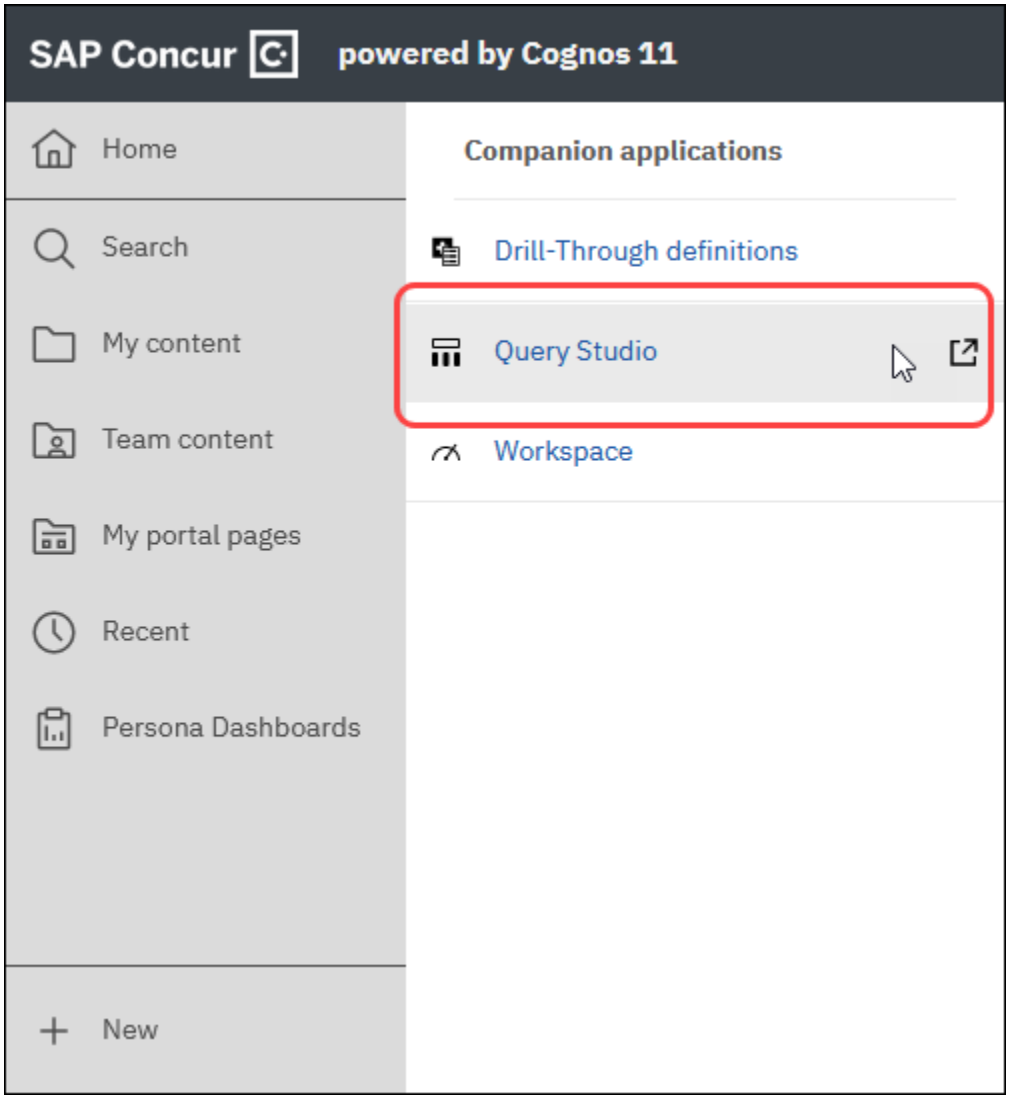
On the **Companion applications** pane, click **Query Studio**.

NOTE: Query Studio will not appear on the **Companion applications** pane if you are using an unsupported browser. Make sure you are using the Mozilla Firefox ESR browser to access Query Studio in Cognos 11.



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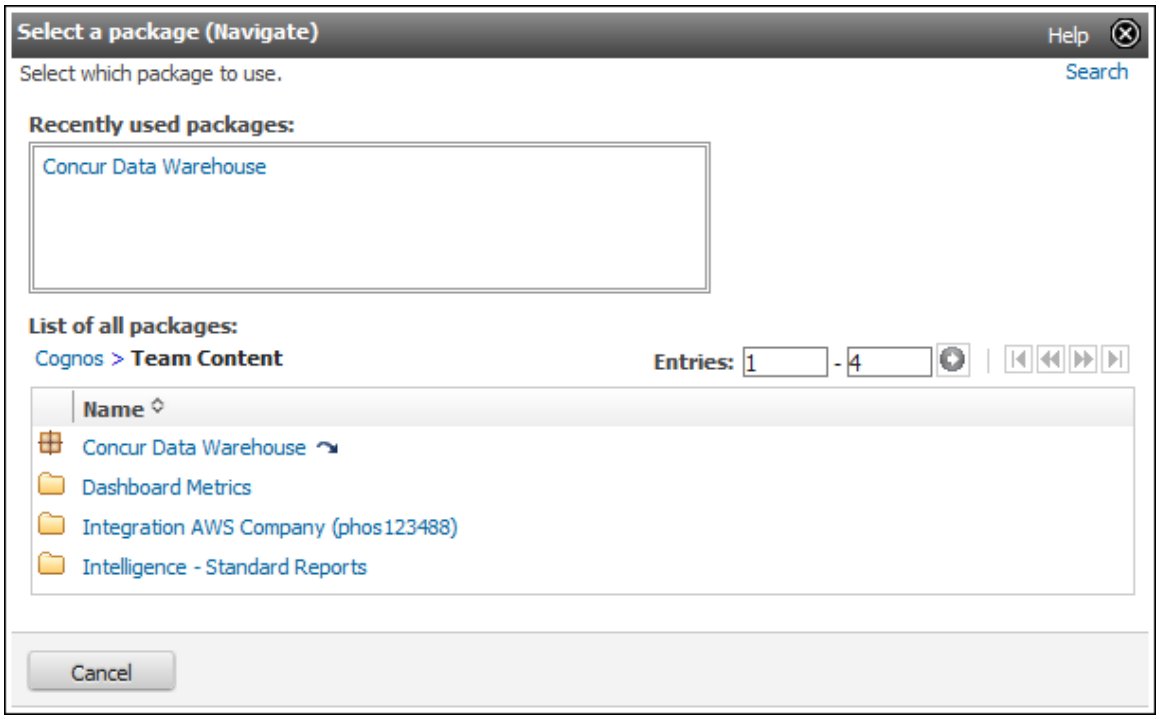
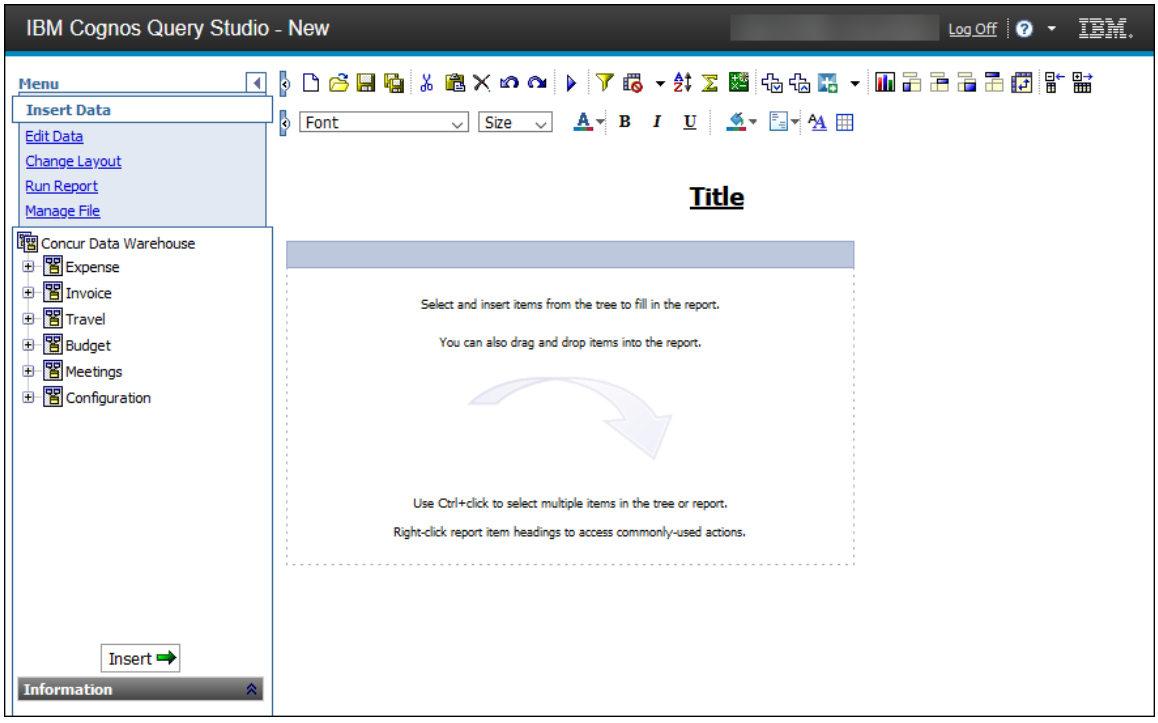
Clicking **Query Studio** opens the **Select a package (Navigate)** dialog. Select the **Concur Data Warehouse** package.



Query Studio opens on a separate tab.



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