Cognos Connection

Computer Training Solutions

Manitoba eHealth
Health. Connected.

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Cognos Connection

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Cognos Connection

Quick Reference

Cognos URL

http://cognos.manitoba-ehealth.ca

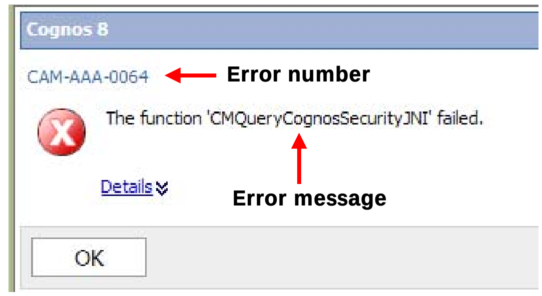
Technical Support

If you experience technical issues while using Cognos, call the eHealth Service Desk at 940-8500 & request that the ticket be assigned to the **L2-DSS** group.

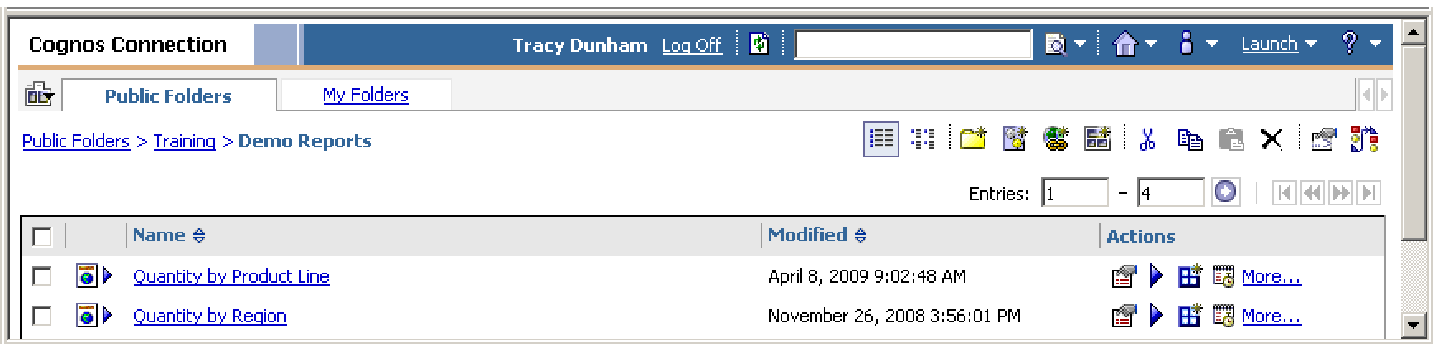
Please provide the following information:

- What is the name & folder location of the report you were trying to run?
- Is this your first attempt at running the report? If not, when was the last time you successfully ran it?
- Did you receive an error message? If so, what is the error number & message? (See example to the right)
  - If you are submitting the service request via email, attach a screen shot of the error message.

An error message in Cognos typically looks like this:



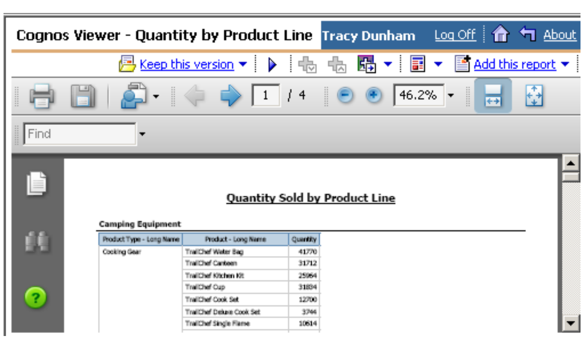
Cognos Connection Page



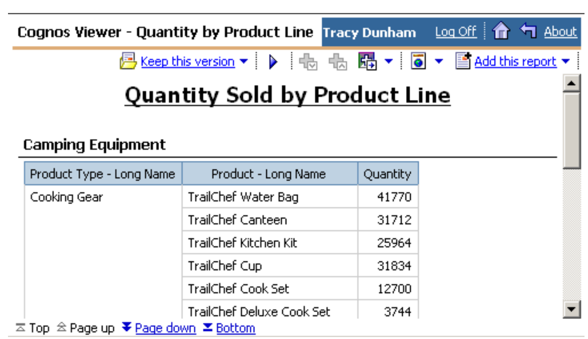
Refresh	Search	Home	My Area
Tab Menu	List View	Details View	New page
Set properties	Run with options	Create a report view of this report	Schedule

Cognos Viewer Page

PDF FORMAT



HTML FORMAT

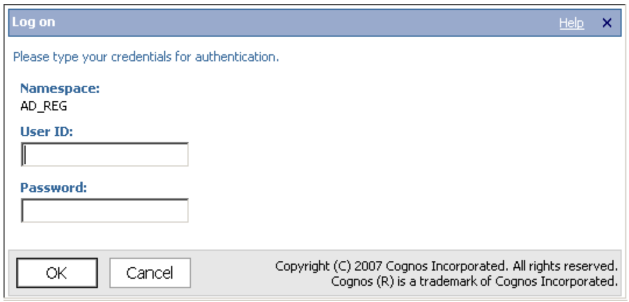


Home	Keep this version	View in PDF Format	Add this report
Return	Run	View in HTML Format	

Getting Started

Log On

1. Go to **http://cognos.manitoba-ehealth.ca**
   The "Log on" screen appears.

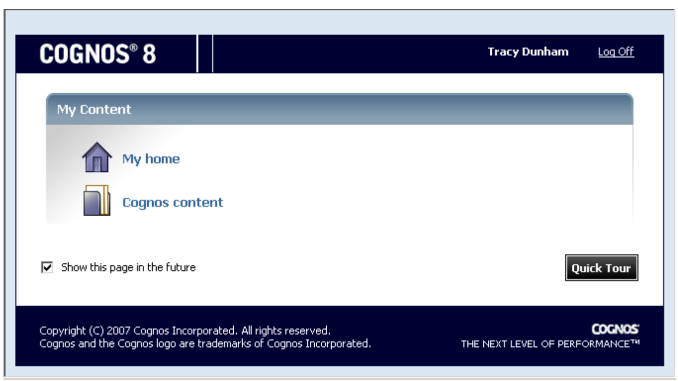


2. Type your User ID & Password.
   Note: Enter your network credentials.
3. Click **OK**.

Overview of Cognos Connection

Cognos Connection provides a single access point to the data & reports that are available in Cognos, a web-based reporting tool.

By default, when you log into Cognos, a Welcome Page appears.



Note: To prevent the Welcome Page from appearing after you log in, clear the check mark next to **Show this page in the future**.

The appearance of the Welcome Page may vary depending on user permissions but the following items will typically be present:

- My home
- Cognos content
- Quick Tour

MY HOME

Click **My home** to display the page that has been designated as your Home Page.

See "Specify a Home Page".

COGNOS CONTENT

Click **Cognos content** to display the Cognos Connection page & the items to which you have been granted access. An example is shown below.

The view will vary depending on individual user permissions.

By default, two tabs are visible in Cognos Connection:

- Public Folders contains content that can be viewed by many users.
- My Folders contains content that is only accessible by you.

QUICK TOUR

Click the **Quick Tour** button to access the online tutorials that demonstrate key features in Cognos.

Use Help

USER GUIDE

To display the Cognos Connection User Guide:

Click the **Help** button in the top right corner of the Cognos Connection screen.

HELP OPTIONS

To use the Help Options:

1. Click the arrow beside the Help button.
   A list of Help Options appears.

2. Select the appropriate option.

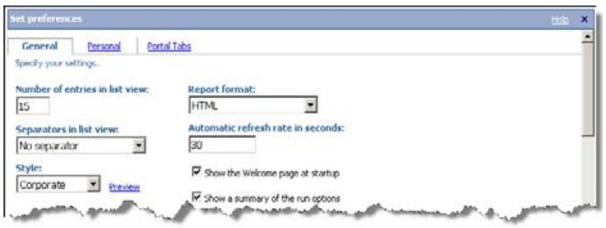
Option	Description
Help	Displays the User Guide
Quick Tour	Provides access to online tutorials
Cognos on the Web	Displays http://www.cognos.com/
Go to the Welcome Page	Displays the Cognos Welcome Page
About Cognos Connection	Displays version & copyright information

Set Preferences

To personalize the Cognos Connection environment:

1. Click the **My Area** button in the top right corner of the Cognos Connection screen.
   A drop down menu appears.

2. Select **My Preferences**.
   The "Set preferences" page appears & the "General" tab is selected.



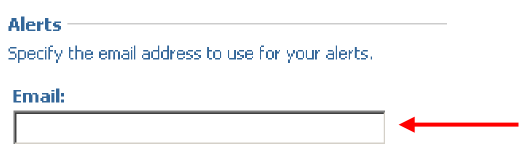
3. Choose the appropriate settings.

   Some of the General preferences are described below.

Option	Description
Number of entries in list view	Maximum number of items that are displayed at once in List View
Report format	Preferred format to view a report E.g. HTML, PDF, Excel
Show a summary of the run options	Show a summary of the run options when a report is not run interactively

4. Select the **Personal** tab at the top of the Set preferences page.
   The "Personal preference" options appear.
5. Choose the appropriate settings.

   Note: The Email field in the Alerts section of the page may be used to specify an email address to receive alerts.



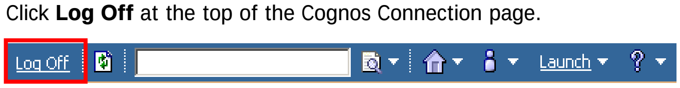
   If no email address is specified, the address in the Primary Logon section is used. See "Receive Alerts".

6. Select the **Portal Tabs** tab at the top of the Set preferences page.
   The "Portal Tabs" options appear.
7. Add, remove or change the order of the portal tabs as needed.
8. Click **OK**.
   The settings are saved & the "Cognos Connection" page appears. Preference changes take effect immediately.

Log Off

To end your Cognos session:

Click **Log Off** at the top of the Cognos Connection page.



Finding Content

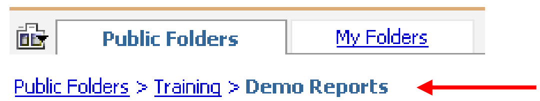
Navigate Content

FOLDERS

Yellow folder icons represent folders that contain items such as other folders & reports.

To view the contents of a folder, click the folder name.

The bread crumb, near the top of the page, indicates the current folder location.



The links in the bread crumb can be selected to view the contents of that particular folder.

Click the **Refresh** button at the top of the page to update the current view.

Note: Blue folder icons represent packages. These provide report authors with access to data sources.

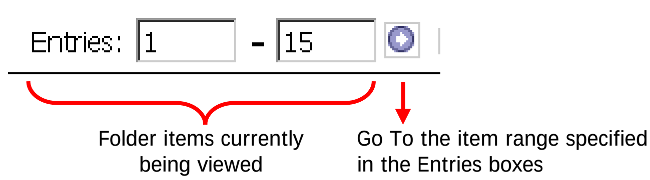
VIEWS

The following buttons are located to the right of the bread crumb & can be used to control how the list of folder entries is displayed.

Button	Description
	List View - tabular format
	Details View – tiled format; displays Description

ENTRIES & PAGES

The following options are located at the top, right corner of the folder list:



Each button will display the corresponding page of folder items:

First Page | Previous Page | Next Page | Last Page

Search Content

The Search feature can be used to locate specific reports. It returns entries whose name &/or description match your search criteria.

BASIC SEARCH

To perform a basic search:

1. Select the highest level folder to be included in the search.
2. Click in the Search box at the top of the screen.

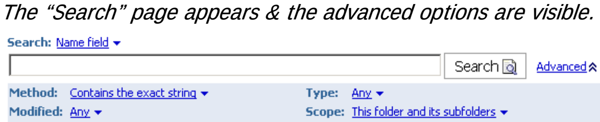
3. Type the word(s) you want to search for.
   Note: Capitalization is ignored.
4. Click the **Search** button.
   The "Search" page appears & the matching entries are displayed.

ADVANCED SEARCH

To use the advanced search features:

1. Select the highest level folder to be included in the search.
2. Click the arrow beside the Search button.

3. Select **Advanced**.
   The "Search" page appears & the advanced options are visible.



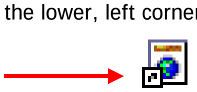
4. Choose the appropriate settings.
   The options are described below.

Option	Description
Search	Field(s) to be searched (Name, Description)
Method	Type of match between the search string & the result (contains, starts with, matches)
Type	Type of entry to search for (E.g. report)
Modified	Date that the entry was last modified
Scope	Folders to include in the search

5. Click the **Search** button.
   The matching entries appear on the Search page.

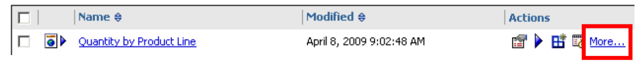
Create a Shortcut

Shortcuts can be used to organize information that you access on a regular basis. Shortcut entries are identified by a small black arrow in the lower, left corner of the icon.



To create a Shortcut:

1. Locate the item to which you want to create a Shortcut.
2. Click **More...** in the Actions column to the right of the entry.



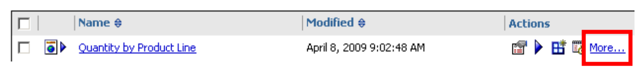
3. Select **Create a Shortcut to this entry..**.
   The "New Shortcut wizard" appears.
4. Type the Name of the Shortcut.
5. Optional: Enter a Description & Screen tip for the Shortcut.
   Note: The Description appears when the Details View is selected & the Screen tip appears when you rest your pointer over the Shortcut icon.
6. In the Location section, click **Select My Folders**.
7. Click **Finish**.
   The shortcut is now accessible from the My Folders tab.

Bookmark an Entry

A bookmark allows you to perform the default action on an item directly from your web browser. (E.g. run a report)

To create a bookmark in Internet Explorer:

1. In Cognos Connection, locate the entry for which you want to create a bookmark.
2. Click **More...** in the Actions column to the right of the entry.



   The "Perform an action" page appears.
3. Select **Add to bookmarks..**.
   The "Add Favorite" dialog box appears.
4. Type the Name of the bookmark.
5. Optional: Select a folder in which to create the bookmark.
6. Click **OK**.
   The "Perform an action" page appears.
7. Click **Cancel** to return to the folder list.
   The bookmark is now accessible from your Favorites list in Internet Explorer.

   Note: When you select the bookmark, you will be prompted to enter your credentials before the default action is performed.

Manage Tabs

To add, remove or change the order of your tabs:

Click the **Tab Menu** button in the top, left corner of the Cognos Connection page.

Create a Page

You can create a page & then customize the content in a way that is meaningful to you. (E.g. display the results of a particular report)

To create a page:

1. Click the **New Page** button at the top of the Cognos Connection page.
   The "New page wizard" appears.

2. Specify a Name for the page

3. Optional: Enter a Description & Screen tip.
4. In the Location section, click **Select My Folders**.
5. Click **Next**.
6. Set the number & width of columns.
7. Click **Add** at the bottom of one of the columns.
8. Click the Portlet that contains the content you want to add.
   Note: To add report content, select Cognos Content.
9. Select the appropriate entry.
   Note: To add report content, select Cognos Viewer.
10. Click the **Add** button to move the item to the Selected entries box.
11. Click **OK**.
12. Repeat steps 7-11 for each column on your page.
13. Click **Next**.
    The "Set page style" page appears.
14. Customize the appearance of your page.
15. Click **Next**.
16. Optional: Select **Add this page to the portal tabs** &/or **View the page**.
17. Click **Finish**.

Note: To edit a page, click the **Edit** button in the top, right corner of the page.

Note: To edit a portlet (E.g. add content), click the **Edit** button in the top, right corner of the portlet.

Specify a Home Page

The home page appears when you log in to Cognos &/or when the Home button is selected.

To specify a home page:

1. Go to the page to be used as the home page.
2. Click the arrow next to the Home button.

3. Select **Set View as Home**.

Viewing Content

Run a Report

To run a report from Cognos Connection:

Click the name of the report.

Note: Depending on the report format, the results may appear in Cognos Viewer or Excel.

Navigate in Cognos Viewer

PAGE NAVIGATION

To navigate through the pages in HTML format:
Use the navigation options at the bottom of the page.

To navigate through the pages in PDF format:
Use the navigation arrows at the top of the page.

RETURN TO THE FOLDER LIST

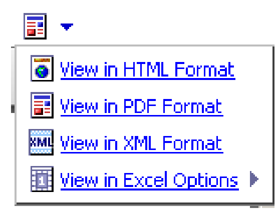
To switch from Cognos Viewer back to the previous list of reports:
Click the **Return** button in the top, right corner of the page.

Customize Report Output

CHANGE THE CURRENT REPORT FORMAT

To change the report format in Cognos Viewer:

1. Click the **View in XXX Format** button on the toolbar.
   A drop down menu appears.



   Note: XXX represents the current report format. The appearance of this button on the toolbar will vary.

2. Select the appropriate format from the list.
   The reformatted report appears.

CURRENT REPORT OPTIONS

The default report options are set by the report author. You can, however, override the default settings for the current run of a report.

To set options for a one-time run:

1. Click the **Run with options** button in the Actions column.
   The "Run with options" page appears.
2. Select the appropriate Format & Language settings.
3. Change other options as needed.
   (See "Work with Prompts" & "Delivering Content")
4. Click **Run**.
   The report runs with the custom settings.

CREATE A REPORT VIEW

A Report View allows you to customize properties for a report without changing the original report. This includes options such as prompt values, schedules, delivery methods, languages and output formats.

Report View entries are identified by the Report View icon.

To create a Report View:

1. Locate the report for which you want to create the Report View.
2. Click the **Create a report view of this report** button in the Actions column.
   The "Specify a name and description" page appears.
3. Enter a name for the Report View.
4. Optional: Type a Description & Screen tip.
5. Select **My Folders** as the location.
6. Click **Finish**.
   The Report View is now available on the My Folders tab.

DEFAULT REPORT OPTIONS

Note: You may not have the necessary permissions to change properties for a report but you can change them for any Report View that you've created.

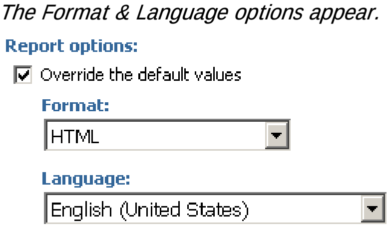
To set default options for a report or Report View:

1. Click the **Set properties** button in the Actions column.
   The "Set properties" page appears & the "General" tab is selected.
2. Select the **Report/Report view** tab.
   Note: Depending on how the report was created, this may be labeled Report, Analysis or Query.

3. Select the appropriate setting from the **Default action** drop down list.

Option	Description
View most recent report	The most recent saved version of the report is displayed
Run the report	The report results are refreshed from live data
Open with Report/Analysis/ Query Studio	The report opens in the authoring tool in which it was created Note: Depending on permissions, you may not see this option

4. Under Report options, enable **Override the default values**.
   The Format & Language options appear.



5. Select the appropriate Format & Language settings.
6. Change other properties as needed.
   (See "Work with Prompts" & "Receive Alerts")
7. Click **OK**.
   The folder list appears.

   Note: The default report format determines the icon that displays beside the report name. Examples:

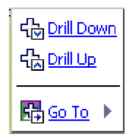
   PDF Excel HTML

Drill Up & Down

The Drill Up/Down feature in Cognos allows you to view a higher/lower level of report detail. This functionality is only available in HTML format. Hyperlinks identify drillable items.

To Drill Up or Down in Cognos Viewer:

1. Right-click the report item you want to drill on.
   A short cut menu appears.



2. Select **Drill Down** or **Drill Up**.

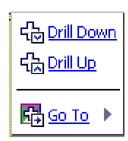
Note: To Drill Down, you can also click the hyperlink.

Drill Through

Drilling through from one report (source) to another (target) is a method by which you can view a separate but related report. The drill through definition is created by the report author. Hyperlinks identify drillable items.

To drill through an item in Cognos Viewer:

1. Right-click the report item from which you want to navigate.
   A short cut menu appears.



2. Select **Go To > Related Links**.
   The "Go To" page appears & shows the available targets.

   Note: If there is only one possible target, the report runs automatically.
3. Click the target you want to navigate to.
   The target report appears.

Work with Prompts

When you run a report, you may be prompted for information. The values that you provide are used as criteria in the report.

RE-PROMPT FROM COGNOS VIEWER

If you would like to enter new prompt values while viewing the report in Cognos Viewer, click the **Run** button on the toolbar.

SAVE PROMPTS

If certain values are used on a regular basis, they may be saved so that you don't have to specify them each time.

Note: You may not have the necessary permissions to change properties for a report but you can change them for any Report View that you've created.

To save prompt values in a report or Report View:

1. Click the **Set Properties** button in the Actions column.
2. Select the **Report/Report view** tab.
   Note: Depending on how the report was created, the tab may be labeled Report, Analysis or Query.
3. Clear the **Prompt for values** check box.
4. Click **Set**.
   The "Prompt" page opens.
5. Enter the appropriate values.
6. Click **OK**.
   The "Set properties" page appears.
7. Click **OK**.
   The list of reports appears.

Note: Once Prompt values have been saved, you may still choose to be prompted by clicking the **Run with options** button & enabling the **Prompt for values** check box.

Delivering Content

Print a Report

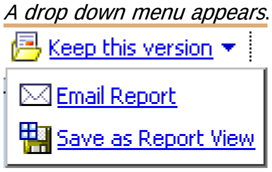
To print a report from Cognos Viewer:

1. View the report in PDF format.
2. Click the **Print** button on the PDF toolbar.
   The "Print" dialog box appears.
3. Select the appropriate print options.
4. Click **OK**.

Email a Report

To email a copy of a report from Cognos Viewer:

1. View the report in PDF format.
2. Click **Keep this version** on the toolbar.
   A drop down menu appears.



3. Select **Email Report**.
   The "*Set the email options" dialog appears.*
4. Enter recipient email addresses, Subject & Body text.
   Note: A maximum of 5 recipients are allowed.
5. Select **Attach the report**.
6. Clear the check mark beside **Include a link to the report**.
7. Click **OK**.

Note: You may also email a report by clicking the **Run with options** button in the Actions column & then selecting **Send me the report by email**.

Save Report Output

For archival purposes, you may want to save a copy of the report results, either within Cognos or in a network location.

WITHIN COGNOS

Note: You may not have the necessary permissions to save a version of a report but you can save any Report View that you've created.

To save a copy of the report output within Cognos:

1. Click the **Run with options** button in the Actions column.
   The "Run with options" page appears.
2. Select the appropriate Format & Language settings.
3. In the Delivery section, select **Save the report**.
4. Click **Run**.
   A copy of the results is saved.

Note: To view the output, click the **View the output versions of this report** button in the Actions column. This button does not appear until a version has been saved.

The number of versions that are retained is controlled from **Set properties > Report output versions**.

OUTSIDE OF COGNOS

To save a copy in PDF format:

1. View the report in PDF format.
2. In Cognos Viewer, click the **Save** button.
   The "Save a Copy" dialog box appears.
3. Specify a location & file name for the file.
4. Click **Save**.

To save a copy in Excel format:

1. View the report in Excel format.
2. In the browser window, select **File > Save As**.
   The "Save As" dialog box appears.
3. Specify a location & file name for the file.
4. In the "Save as type" list, select
   Microsoft Office Excel Workbook (*.xls).
5. Click **Save**.

Schedule a Report

A report may be scheduled to run at a recurring date & time.

Note: You may not have the necessary permissions to schedule a report but you can schedule any Report View that you've created.

To schedule a report or Report View:

1. Click the **Schedule** button in the Actions column.
   The "Schedule" page appears.
2. Specify a Start & End date/time for the schedule.
3. In the Frequency section, indicate how often the report should run.
4. Optional: To specify Format, Language or Delivery options, select **Override the default values** in the Options section & then choose the appropriate settings.
5. Optional: Under Prompt values, select **Override the default values** to save custom prompt values.
6. Click **OK.**

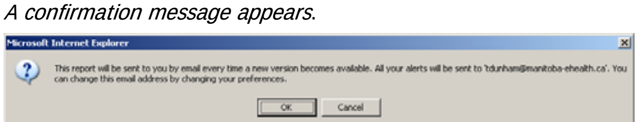
Receive Alerts

Adding yourself to the Alert list for a report ensures that you are sent the latest version of the report when it becomes available.

To enable an Alert:

1. Locate the item for which you want to receive an Alert.
2. Click **More…** in the Actions column.

3. Select **Alert me about new versions**.
   A confirmation message appears.



   Note: An email address for the Alerts may be specified in My Preferences. (See "Set Preferences")

4. Click **OK**.

Note: To view/manage Alerts, select **My Area > My Watch Items** & click the **Alerts** tab.

Work with Watch Rules

A Watch Rule allows you to be notified when a specific condition is met. (E.g. wait time exceeds 12 h)

Watch Rules can only be created in saved HTML reports & the report author must have enabled Watch Rules.

ENABLE A WATCH RULE

Note: You may not have the necessary permissions to enable Watch Rules in a report but you can enable them in any Report View that you've created.

To enable Watch Rules in a report or Report View:

1. Click the **Set Properties** button in the Actions column.
2. Select the **Report/Report view** tab.
3. Click **Advanced options**…
4. Select the following options:
   Enable selection-based interactivity in HTML reports
   Enable enhanced user features in saved output versions
5. Click **OK**.
6. Click the **Run with options** button in the Actions column.
   The "Run with options" page appears.
7. Select **Format > HTML** & **Delivery > Save the report**.
8. Click **Run**.
   An HTML version of the report is saved.

CREATE A WATCH RULE

To create a Watch Rule in a report or Report View:

1. Click the **View the report output versions of this report** button in the Actions column.
2. Select the HTML report.
3. Right-click the data item.
   (E.g. wait time)
4. Select **Alert Using New Watch Rule**.
   The "Specify the rule" page appears.
5. Specify the criteria for which you want to be notified.
6. Click **Next**.
   The "Specify the alert type" page appears.
7. Select the method(s) by which you want to be notified.
8. Click **Next**.
   The "Specify a name and description" page appears.
9. Enter a name for the entry.
10. Optional: Type a Description & Screen tip for the Watch Rule.
11. Select **My Watch Items** as the location.
12. Click **Finish**.

Note: To view/manage Watch Rules, select **My Area > My Watch Items** & click the **Rules** tab.