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Southampton

<div style="background:blue;color:blue;text-align:center">**This work instruction was last updated: 22nd March 2010**</div>
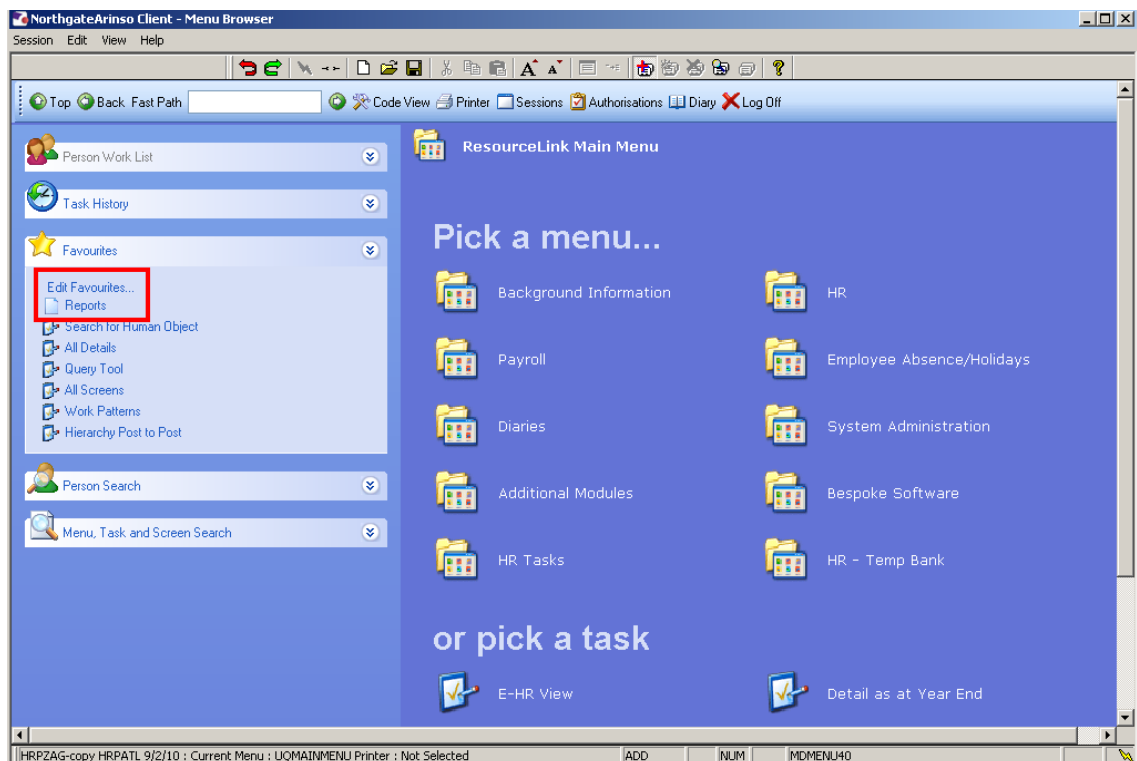
Cognos Reports

This work instruction guide will take you through the steps required to log into the Cognos reporting system. It explains the **Home** page, what the different icons do, how to navigate around the system and also provides examples of how to access the available reports.
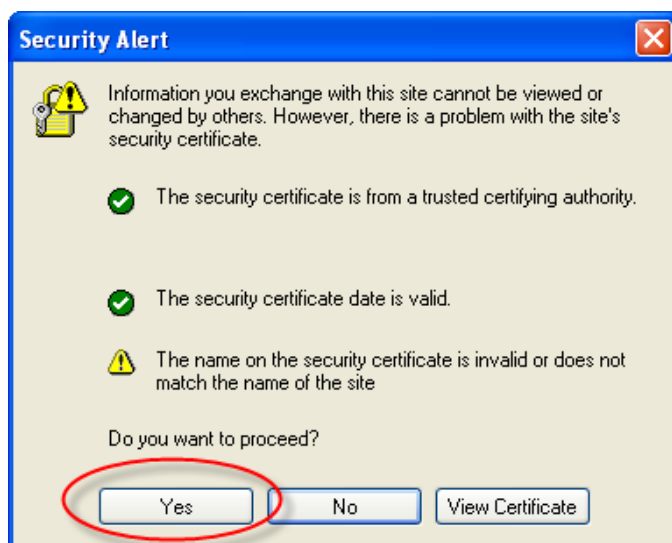
![University of Southampton logo]

1   Logging onto the Cognos system

Access to Cognos reports is through your normal log on in the ResourceLink system.

1.1   Log into ResourceLink.

1.2   Click on the **Reports** link found in the **Favourites** area of the **Control Panel** on the left hand side of your ResourceLink **Home Page**.
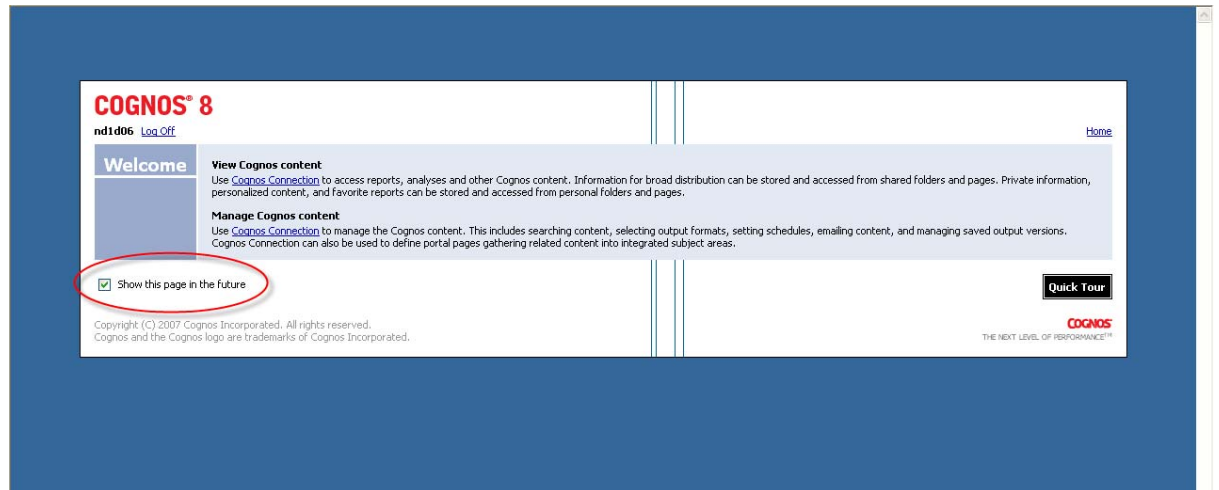

💣   The following warning box will appear.

1.3   Click on **Yes**.

The following screen will appear.

1.4   This screen appears each time you log on to the Cognos reports unless you un-tick the box labelled "**Show this page in future**, so it is worth un-ticking this box the first time you ever log in to Cognos.

1.5   Your **Operator** log in will be shown at the top of the screen next to the link that enables you to **Log Off**
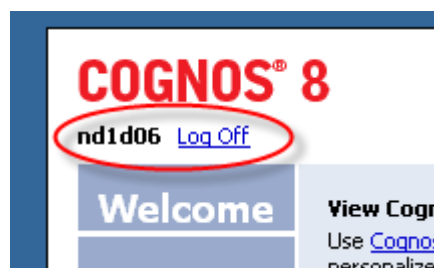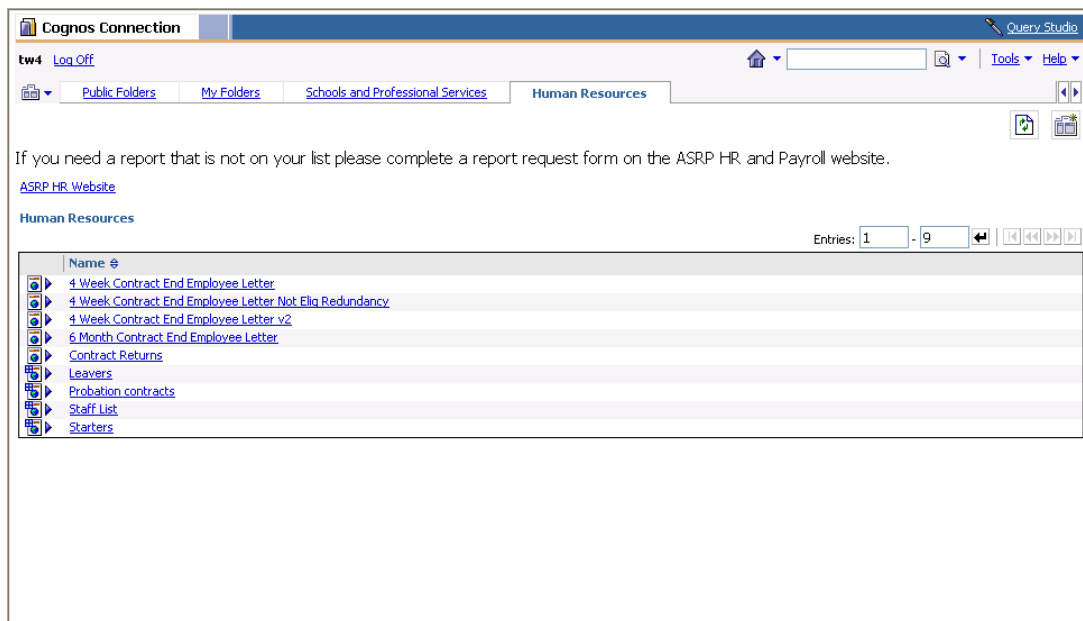

1.6   To enter and view the reports, click on the **Cognos Connection** link under **View Cognos Content**.

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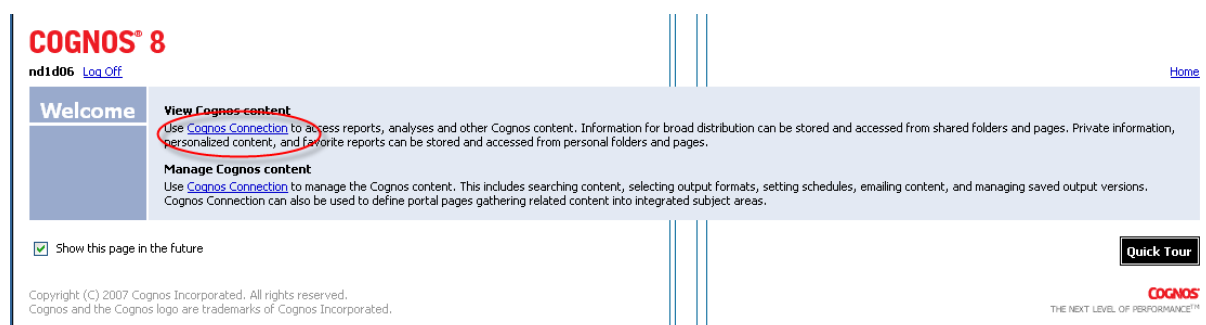
2   The Cognos Home Page

When you have signed in you will see a list of reports that are available to you.

NB: the list of reports displayed will vary according to whether you work within Central HR or Payroll or out in one of the schools / PSDs.

2.1   The following icons and options are available from this screen.
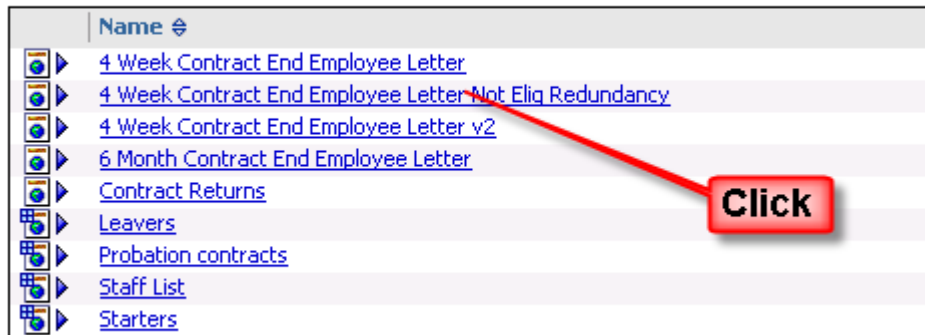

Option to **Log Off**

This the **Home** icon. After you have run a report, you can use this icon to return to the Cognos home page.
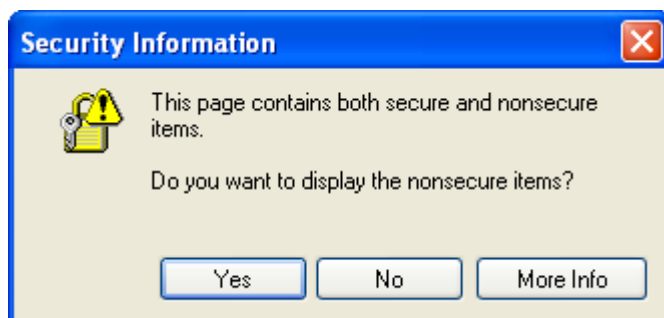
3 How to view reports

3.1 To run a report, simply click on the title of that report.

Human Resources

🕭 When you have clicked on the report link that you require you will see the following warning window:

3.2 Click on **Yes**

3.3 In some cases the report will then run and appear on your screen; in other cases you will be required to select some parameters for that report (such as dates, etc.) before the report generates.

ⓘ Where you do need to select some parameters, there will always be instructions on the screen.

4 Example - The Starters Report

The following page will be displayed when you have clicked on the **Starters** link.

It is merely a case of following the instructions shown on the screen.

4.1   Click in the boxes to select the criteria you require in your report.
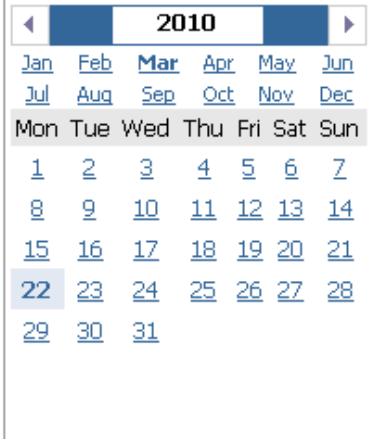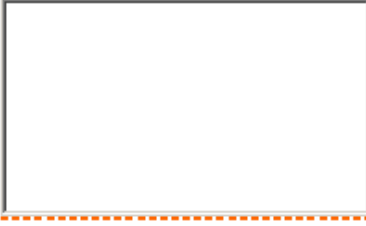
4.2   Click **Select all** Select all if you require all criteria to be shown in your report

4.3   Click **Deselect al**l Deselect all if you wish to undo all choices or amend the criteria for the report

4.4   Use the scroll bar to move up and down the available choices for your report criteria

4.5   Select the **start date** for your report

2. Select a start and end date and press insert (mandatory); press remove to remove a date selection.

From:

○

◄		2010			►
Jan	Feb	**Mar**	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Insert ➜

◄ Remove

＊Choices:

Select all Deselect all

◉ Earliest date

ⓘ   Within the Cognos system, mandatory fields are indicated by a red asterisk ＊

4.6   Use the arrows to select the year required for the start of your report.

4.7   Click on the **Month** that you want the report to start from. This will appear in bold type.

4.8   Click on the **Day** that you want the report to start from. This will appear in bold type and be highlighted slightly.

4.9   Next, you need to select an **end date** for your report, following the same method as for the start date (see steps 4.6 to 4.8 above)

4.10   Once you have selected the **From** and **To** dates, click on the **Insert** button
        so that the dates appear in the box, as shown below:

4.11   Click on **Finish** to run the report.

4.12   If you wish to cancel the report, click on **Cancel**

After a few seconds your report will open on the screen (usually in html format).

5 Changing the format of a report

Any of the reports can be generated in any of the following formats:
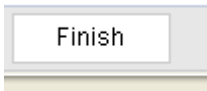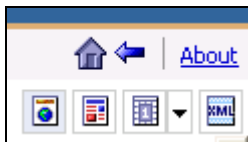
- **PDF document**

- **HTML document**

- **Excel spreadsheet**

- **XML code**

5.1 This is done by clicking on the relevant icon on the top right of the screen.

ⓘ Explanation of the different icons:

Option to display the report in HTML format.

Option to display the report in PDF format.

Option to display the report in a single Excel sheet format. (The drop-down arrow on the right of the icon allows you to select other Excel file types if required).

Option to display the report in XML code format.

5.2 To view your report in a different format, simply click on the relevant button and the report will regenerate in the chosen format.

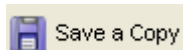# 6 Further options available when generating a report in PDF

There are a number of options available to you when generating a report in Adobe PDF format.

6.1 Access is via the tool bar at the top of the PDF document.
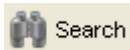

ⓘ Explanation of the different icons:

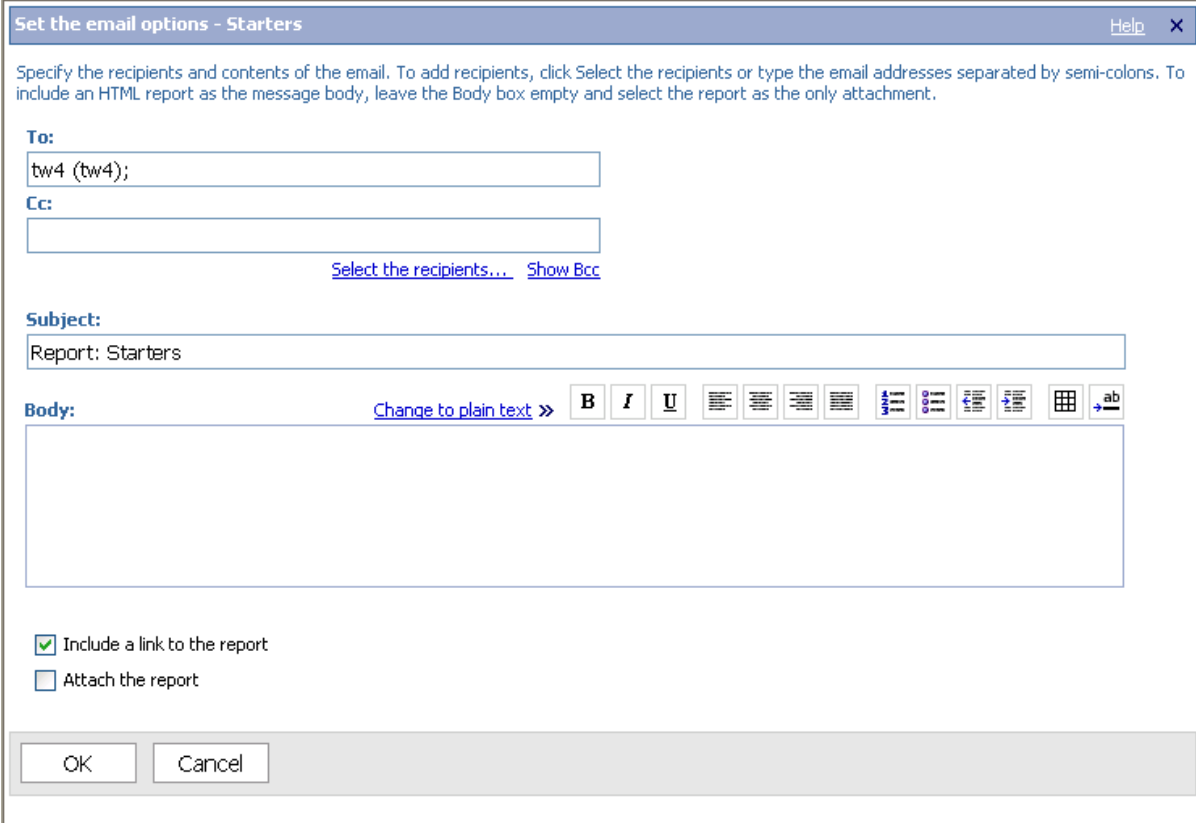| Icon	Description
Save a Copy	Option to save the report to the hard drive or disk
(print)	Option to print the document
(email)	Option to send a URL link within an email or send the document as an attachment to an email.
Search	Option to search the report for key words within the report.
(hand)	Option to move around the document.
Select	Option to select specific content within the document.
(snapshot)	Option to capture a snapshot of content within the document
(zoom controls 148%)	Options for resizing the document
(rotate)	Option to rotate the document.
(ABC)	Option to spell check
(undo)	Option to undo.
(copy)	Option to copy a selected area of the document.

7 Sending a report by email

7.1 Click on the email icon ⊠ located at the top right of the screen.

7.2 The screen below will be displayed.

Set the email options - Starters Help ✕

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To:

tw4 (tw4);

Cc:

Select the recipients... Show Bcc

Subject:

Report: Starters

Body: Change to plain text » **B** *I* <u>U</u> ≡ ≡ ≡ ≡ ≔ ≔ ⇤ ⇥ ⊞ →ab

☑ Include a link to the report
☐ Attach the report

OK Cancel

7.3 To select the recipients of the email **type** the email address in the **To** or **CC** fields or **click** on the link to access the directory.

7.4 Type your message in the **Body** field

ⓘ You can choose whether the recipient of your email receives either a link to the report or receives the report as a file attachment.

7.5 The system defaults to the option "**Include a link to the report**"
☑ Include a link to the report as this ensures that only staff who are set up with the appropriate access rights within ResourceLink and Cognos will be able to view HR information.

7.6 However, if you do need to send the report as a file attachment, then simply click in the box labelled "**Attach the report**" ☑ Attach the report

7.7 Click on **OK** and the email will be sent.

8   Logging off after using the Cognos reporting tool

8.1   Click on the [Log Off] icon at the top of the screen.

The following screen will be displayed.

8.2   If you want to log in again, simply click on the [Log on again...] link.

     ⓘ   You will then be taken back to the initial screen to enter the system.

8.3   If you have finished using Cognos, click on the white cross in the red box to close the Cognos window.