UNIVERSITY OF
Southampton

<div style="text-align:center">**This work instruction was last updated: 22nd March 2010**</div>

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View and Print Options for Reports in Excel

This work instruction will instruct you how to change the view and print options of a report when you are viewing it in Excel.
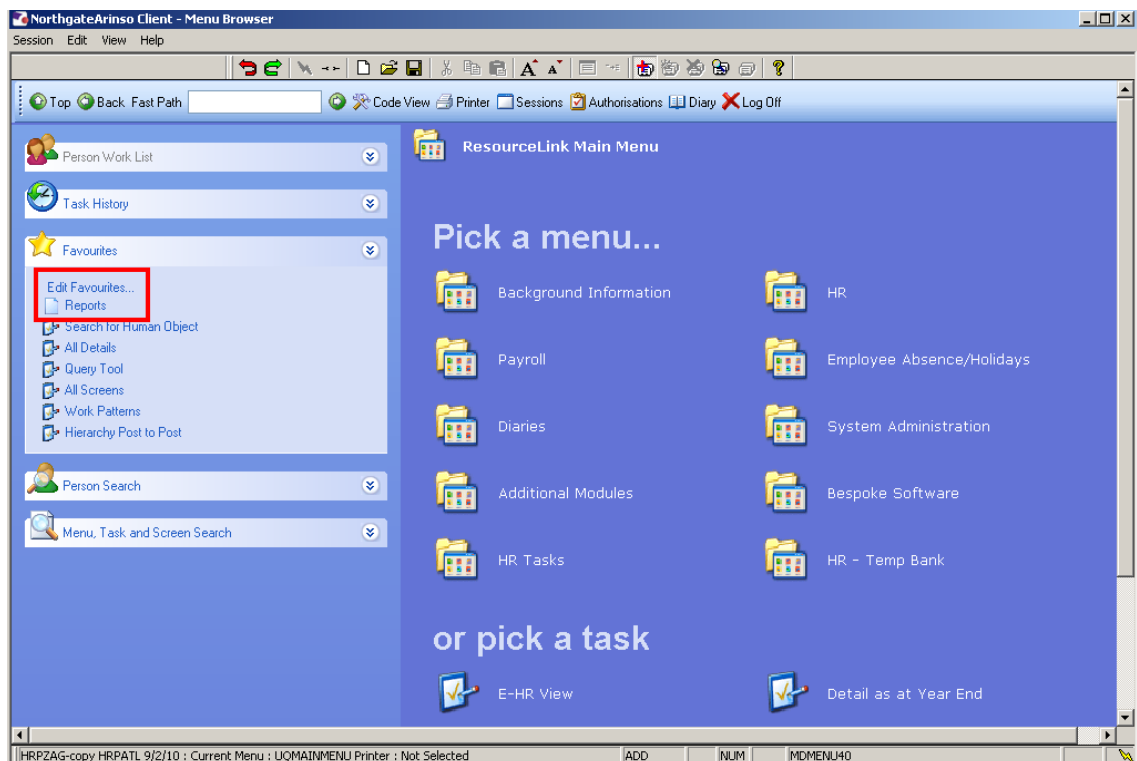
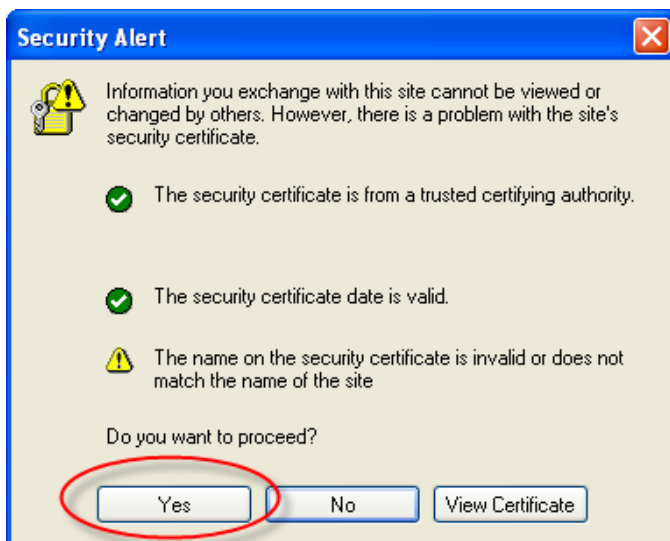# 1 Logging onto the Cognos system

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**.
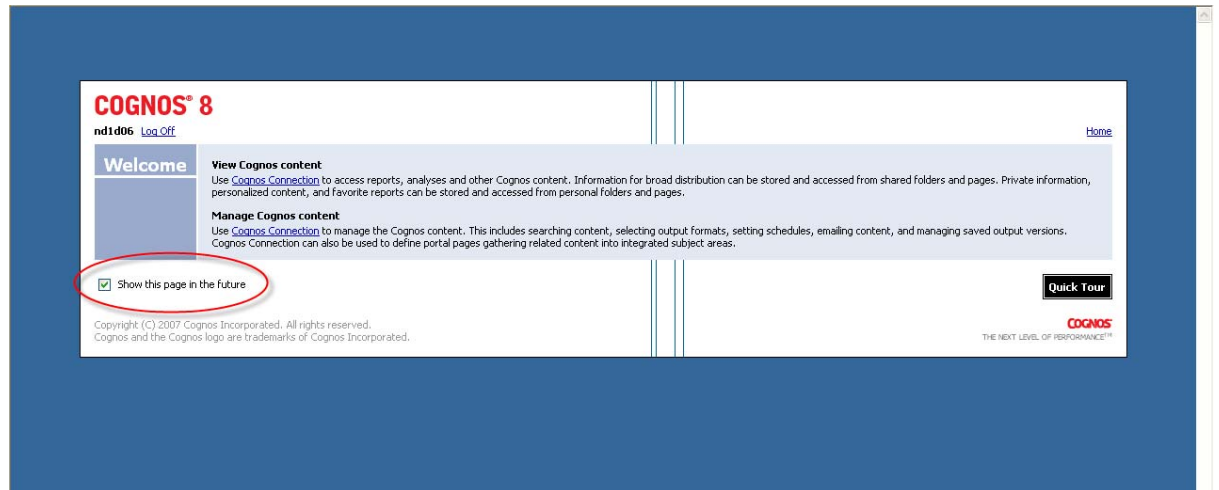

💣   The following warning box will appear.

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**
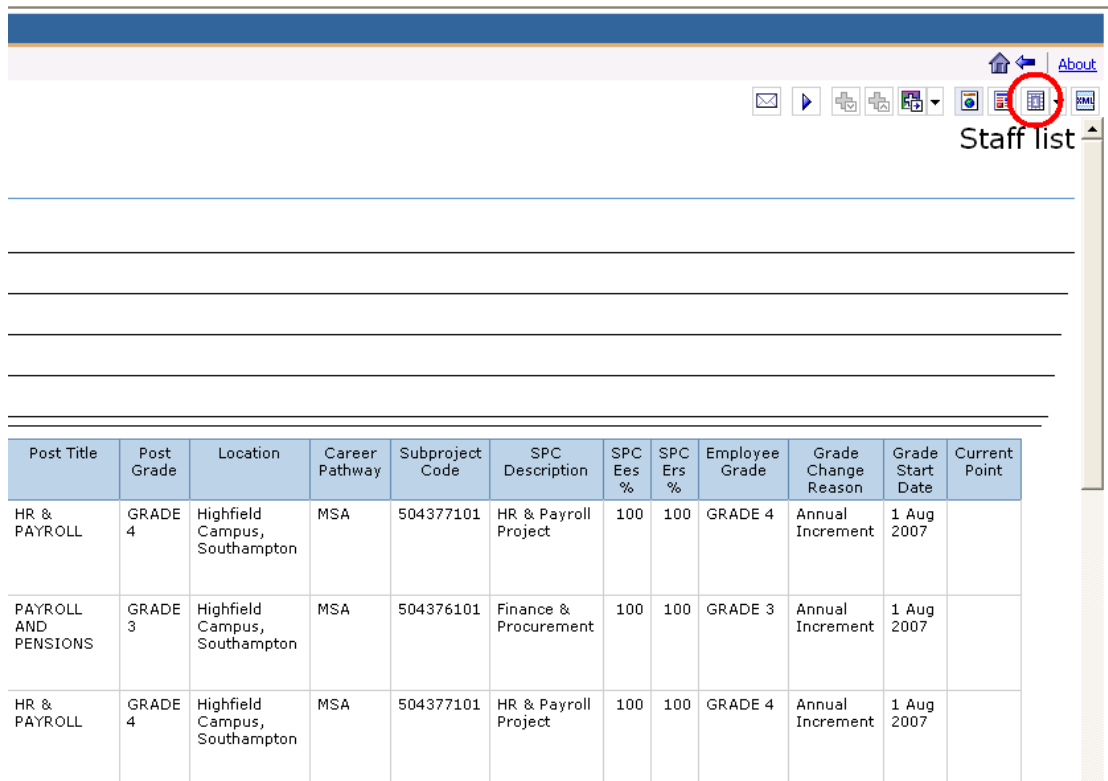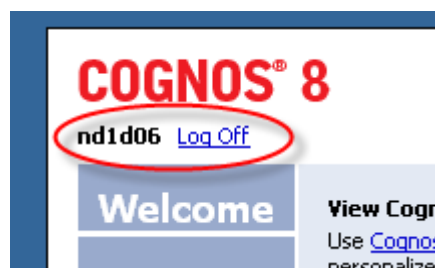

1.6   To enter and view the reports, click on the **Cognos Connection** link under **View Cognos Content**.
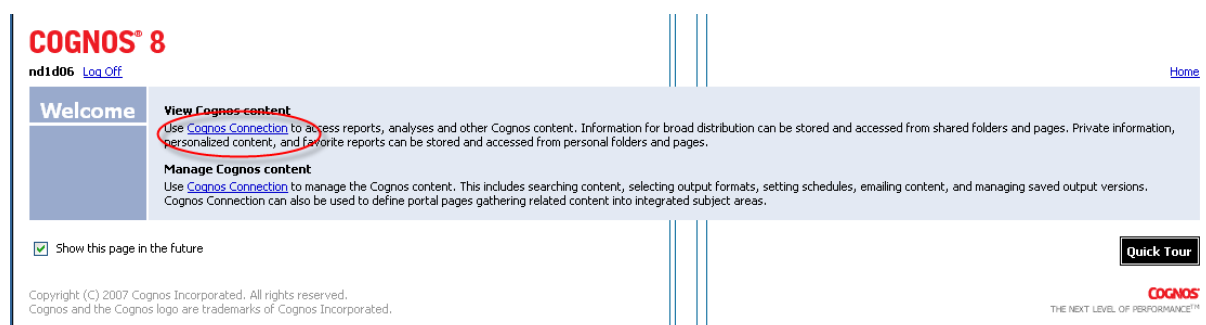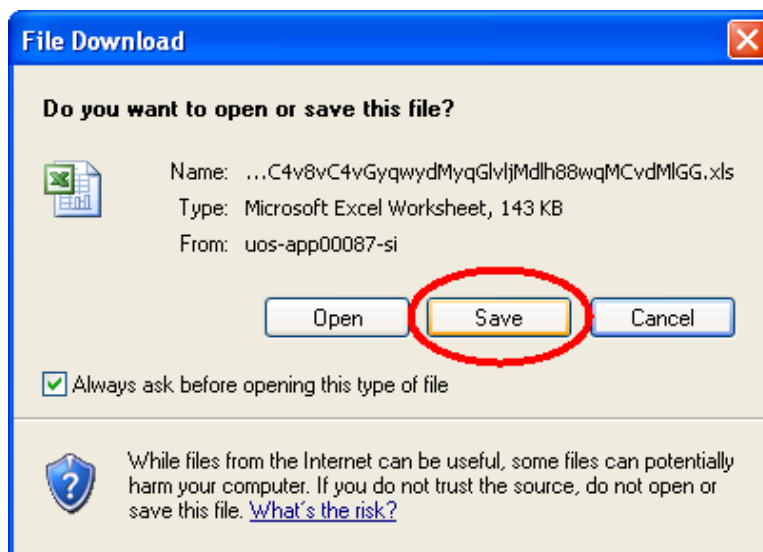
2   Re-generating a report in Excel

Once you have selected any report and run it, it will open in PDF format by default.

2.1   To re-generate the report in Excel, simply click on the Excel button on the top-right of the screen (circled below).
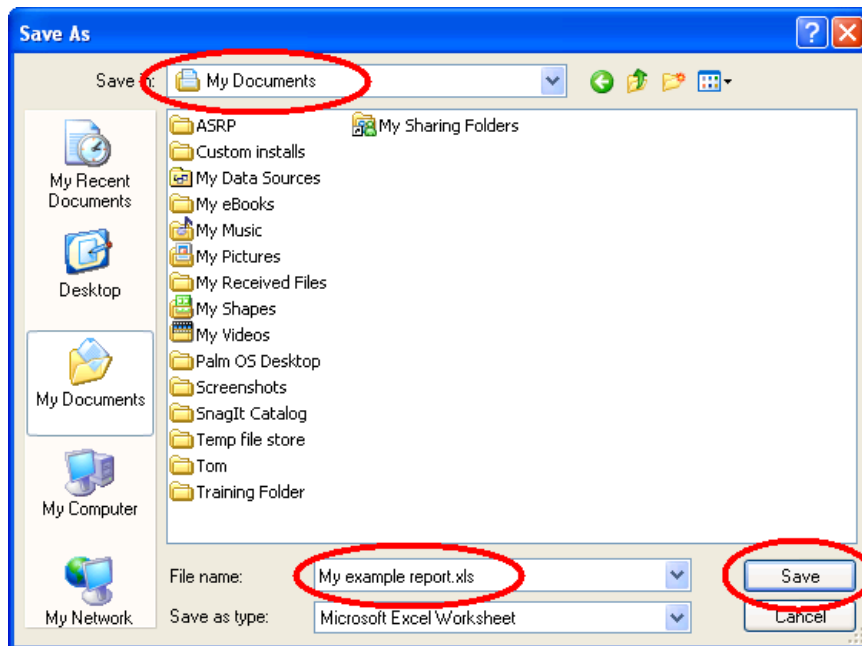

2.2   After a few seconds you will be asked whether you would like to **Open**, **Save** or **Cancel** the file in Excel. Click on **Save**:

2.3   Specify where you would like to save the report, give the file a suitable name and click on **Save**:

> ☀ As these are HR reports containing sensitive data, do ensure that you save them to a suitable location (do <u>NOT</u> save them to public areas of a resource drive, for example).

2.4   If you get a pop-up window, informing you that download is complete, place a tick in the tick-box to avoid getting this message again, and then click on **Open**:
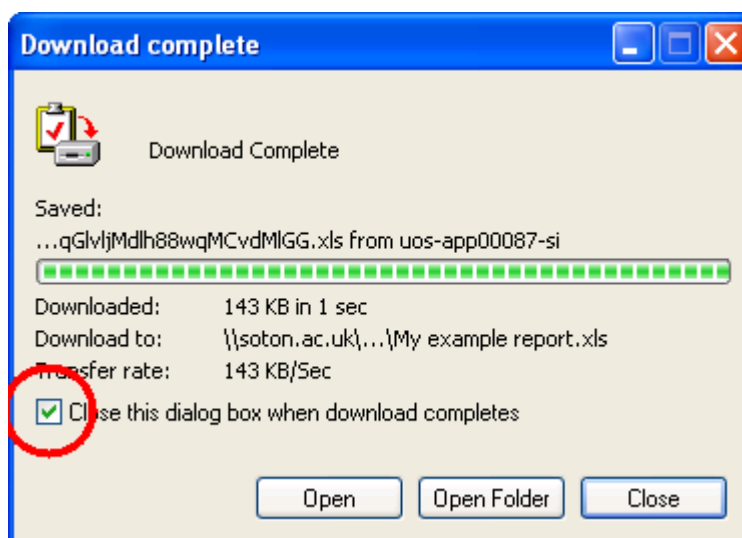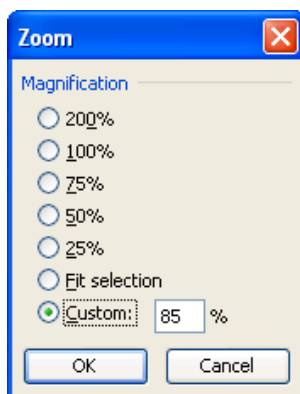

2.5   Your report will now open in Excel.

3   Changing the View on Screen in Excel

3.1   There are a couple of ways to zoom in or out in Excel (so that you can view more or less data within one screen). Either go to the **View** menu and click on the **Zoom…** line:
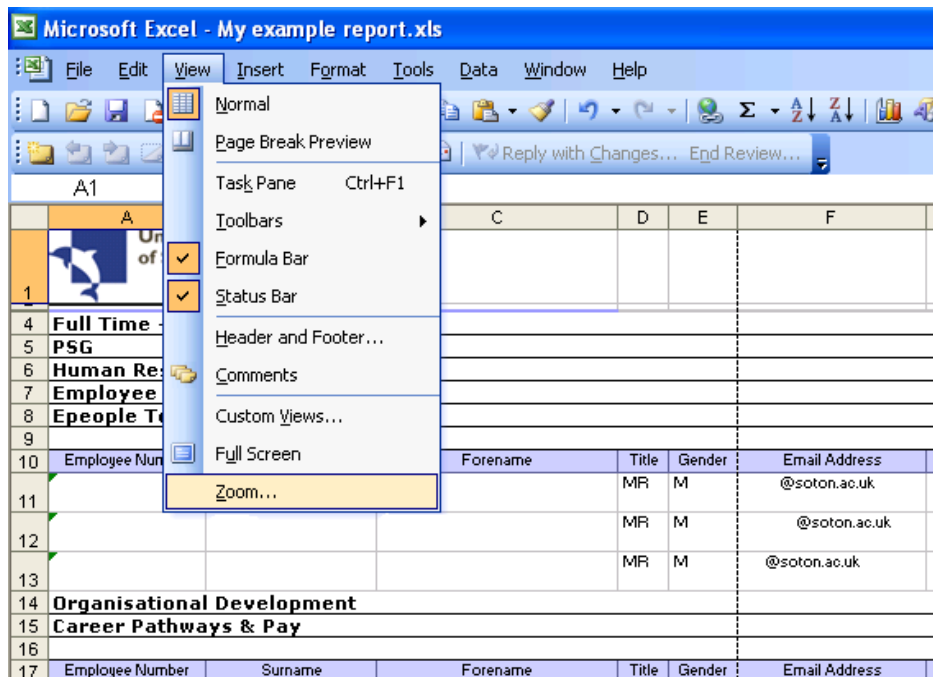
3.2   Then select one of the listed zoom percentages, or use the **Custom** field to enter any percentage, then click on **OK**:
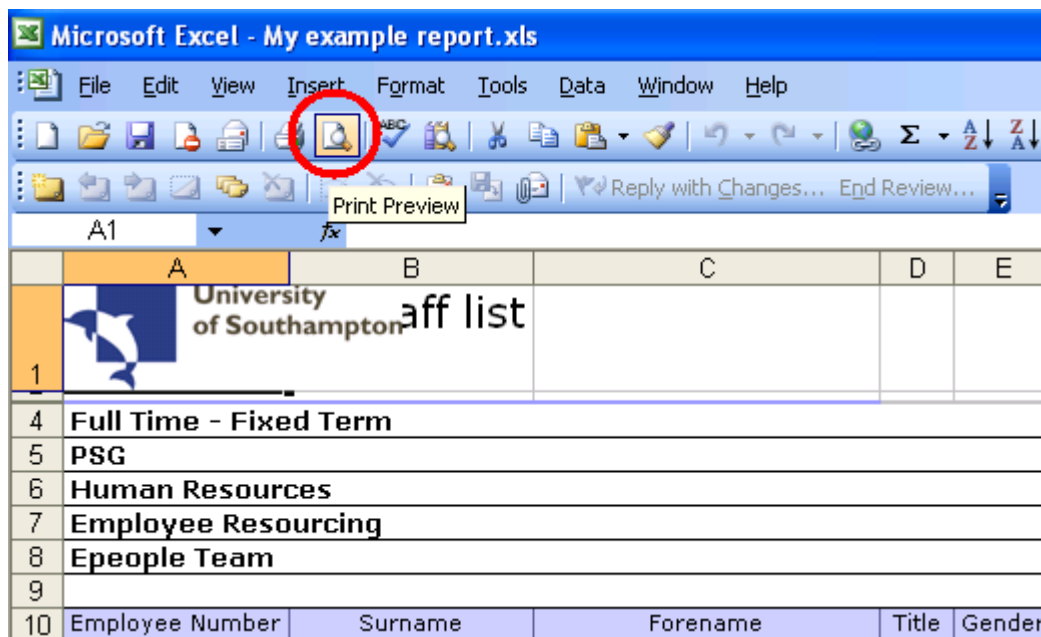

3.3   Alternatively, you can simply hold down the **Ctrl** key on your keyboard and then use the scroll button on your mouse to zoom in or out.
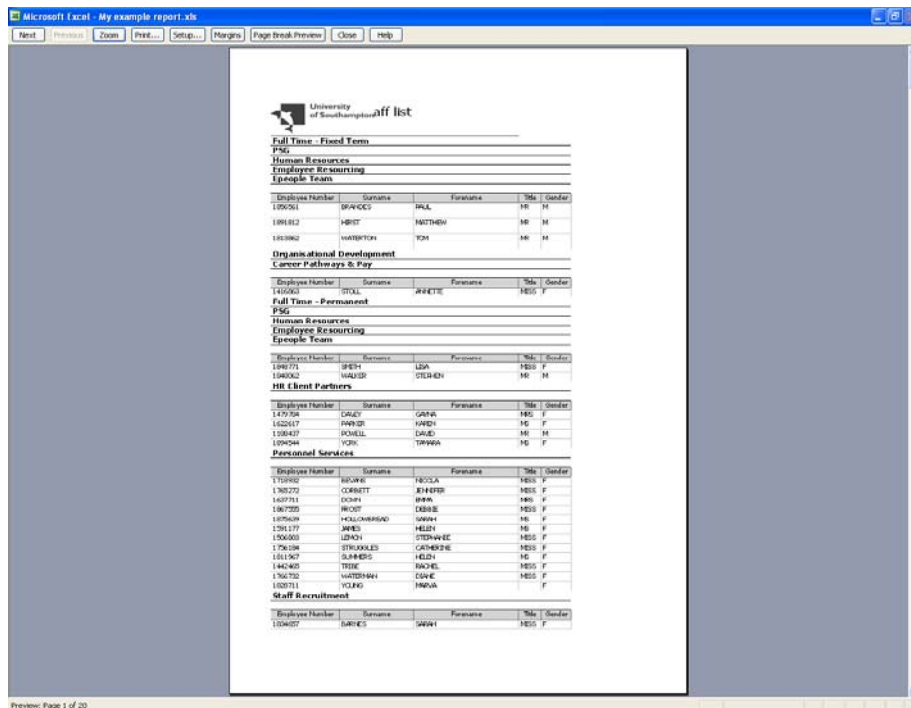
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4 Changing the Print Options in Excel

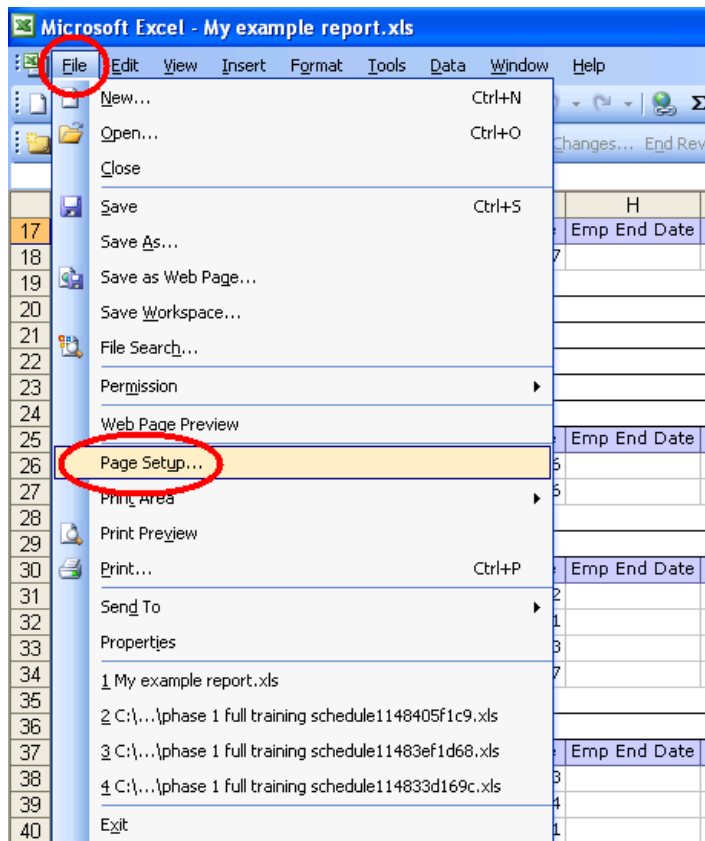4.1 You can use the **Print Preview** button to see how the report would look if you printed it as it is:


4.2 This will open the **Print Preview** page view:

4.3 Simply click on the **Close** button to return to the normal Excel workbook view.

4.4 When you do return to the normal Excel workbook view, you will notice that dashed lines now appear on the screen, indicating where the page breaks would be if you were to print off the report as it is now:

4.5 To adjust the print setting, use the **File** menu and go down to **Page Setup…**:

4.6   A Page Setup window will appear, wherein you will be able to make the following changes to your document:
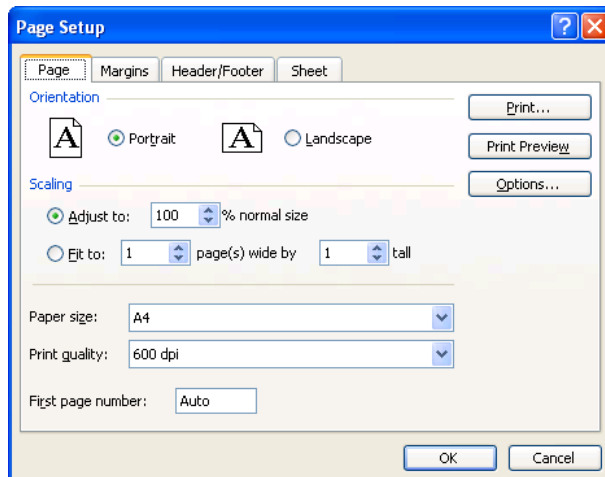
- Set the page to either portrait or landscape orientation (**Page** tab)

- Set the page to automatically fit 1 or 2 or 3 etc. pages on each printed page (**Page** tab)

- Set the margins around the edge of the printed page (**Margins** tab)

- Add a header and/or footer to the printed page (**Header/Footer** tab)

- Set row and/or column headings to print on each page (**Sheet** tab)

- Select whether the page prints gridlines, etc. on the printout (**Sheet** tab)

5 Printing One Section of a Report

If you have a large report and only wish to print off a small section of it, then you can set up the print area by following these steps:

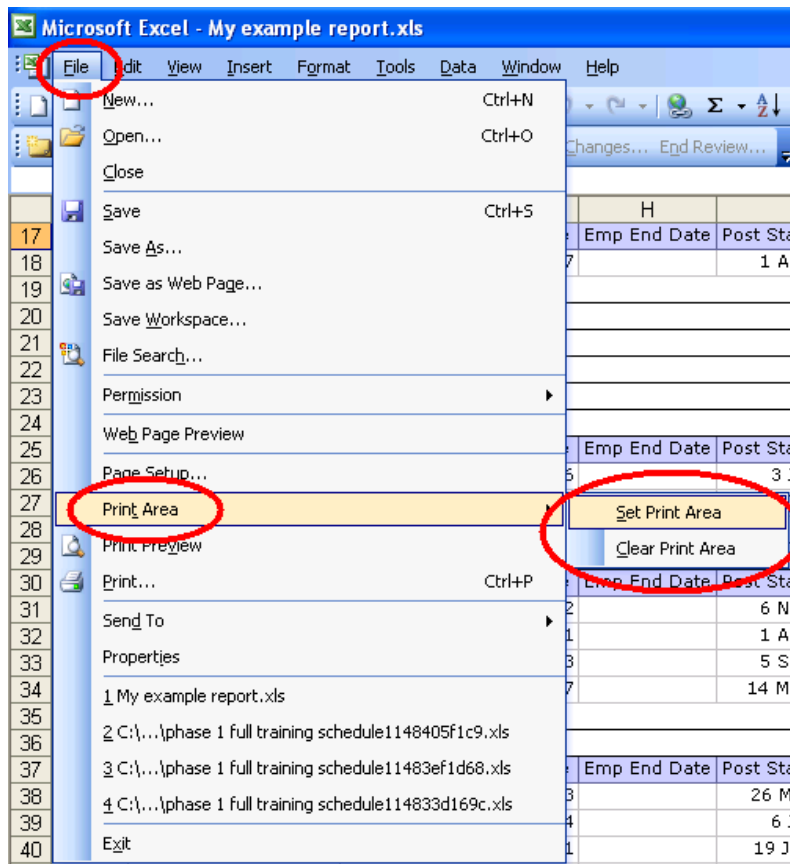5.1 Use your mouse to select the area that you wish to print:

5.2 Then go to the **File** menu and select **Print Area** / **Select Print Area**:

5.3   The area that you have selected will now have a thicker border around it:

5.4   If you are happy with the selection then you can simply click on **Print** to print this section.

5.5   To de-select this area, go to the **File** menu and then **Print Area** / **Clear Print Area**.

6   Logging off after using the Cognos reporting tool

6.1   Click on the Log Off icon at the top of the screen.

The following screen will be displayed.

6.2   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.

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