IBM Cognos Analytics with Watson is the reporting tool that NMU uses to access information across many datasets. This includes student, faculty/staff, financial, and course information.

HOW TO ACCESS COGNOS

Cognos is an online service accessed through a web browser. Please use the Chrome web browser to access the website. It will **not** work in Internet Explorer or Edge.

You may go directly to the reporting tool by typing the URL https://cognosbi.nmu.edu/cognos/bi/ into your browser and bookmark it for future use. Otherwise, you can access Cognos by logging into MyNMU at http://mynmu.nmu.edu/ and clicking the "Cognos Reports" tile.

When you click the link, a new tab will open asking you to login with your username and password. If you are accessing Cognos for the first time, please use the credentials assigned to you through email.
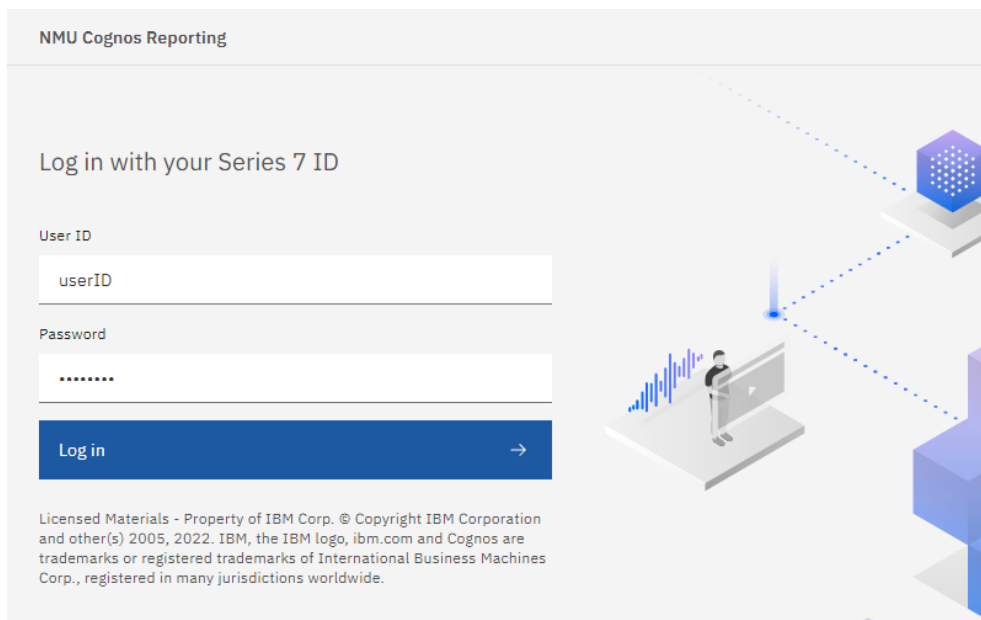
Your User ID is the beginning of your email address (before the @ symbol). Your password is unique to Cognos, so it does not affect other NMU software and systems, such as Banner or MyNMU. Once you type in your credentials, click the blue **Log in** button.

CHANGING YOUR PASSWORD

Cognos has its own password and is **ONLY** for Cognos Reporting. It does not affect your NMU or Banner password.

If you are a **new** Cognos user, you will receive your password in the initial email sent with these instructions. If you would like to **change your password** to something of your choice or you **forget your password** and need it reset, please contact Kelly Larmour directly at 227-1914 or klarmour@nmu.edu.

HOME SCREEN

Your home screen after you log in will display your recently accessed reports. The first time you log in, it will be blank because you haven't run any reports yet.
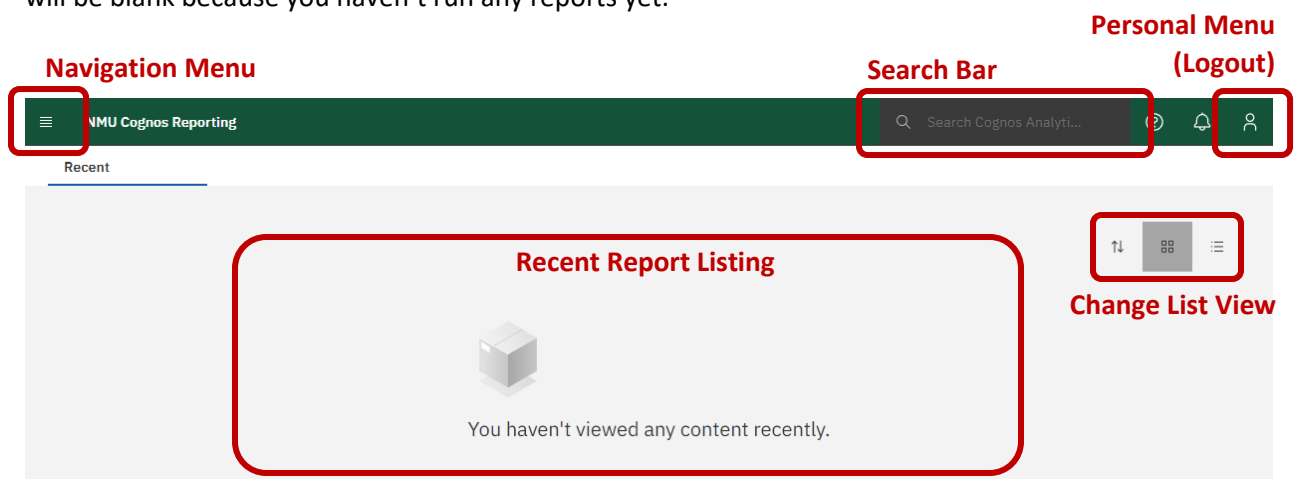
To find your reports, you will need to navigate to Content. Click on the 4-bar icon in the upper left of the screen to show the dark-colored **Navigation Menu**. Click **Content**.
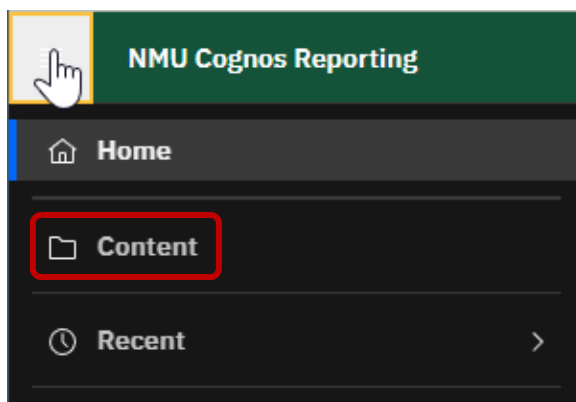
Home will take you back to the Recent tab (or your default home screen).

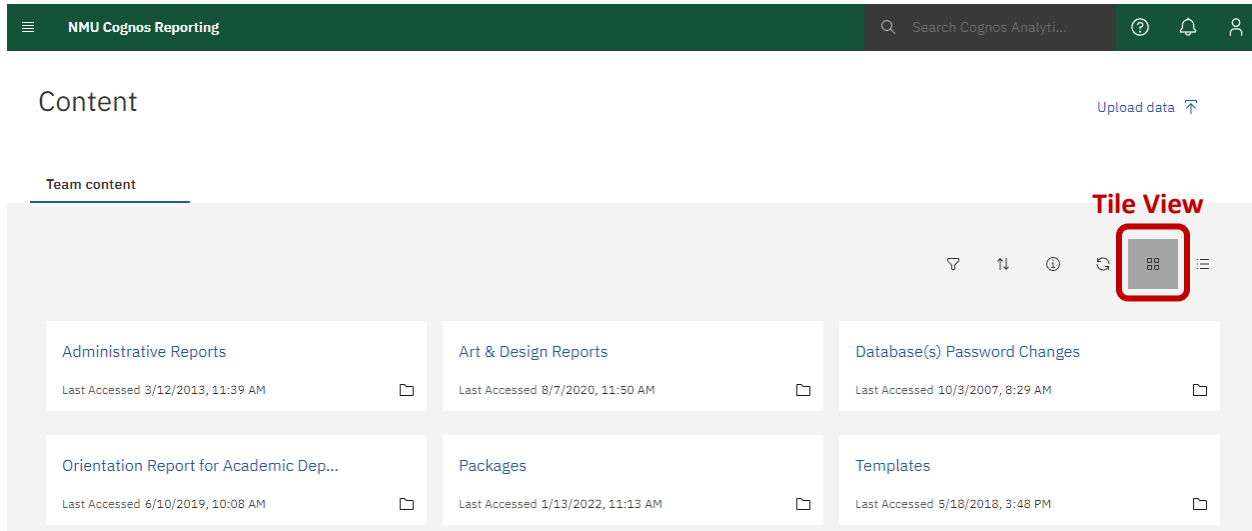**Content** is where all of your folders and reports are located.

Recent will pop out the names of reports you recently accessed.

If you are a report writer, you will also see the option to create a new report in this menu.

CONTENT

The default view of Content is the **Team content tab**. The default view will list the folders as **tiles**.

To change the way you see the folders and reports, you can select a view preference**.**
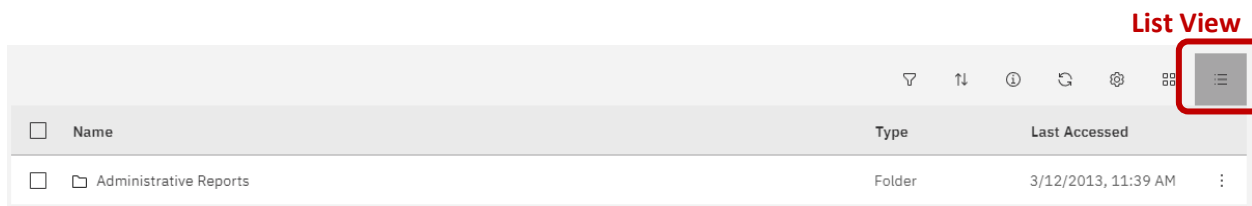
Tiled view
This shows folders and reports as tiles with an icon in the bottom right.

List view
This shows folders and reports as a list with an icon to the left of the title.

The remainder of these instructions will be showing screenshots using the **List view**, but it is a matter of personal preference for which view you would like to use.

All folders are at the top with the reports listed after the subfolders in alphabetical order.

If you are also a report writer, you will notice that your screen also displays the **My content** tab. You can change the view of the folders and reports on this tab and also toggle over to the Team content tab from this screen.

Content

My content | **Team content**
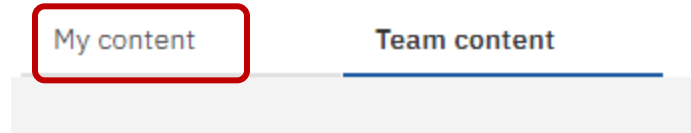
My content functions the same as it did in the previous version. You are able to edit and save your personal reports in this folder. All of your My content should have been brought over with the upgrade. If not, please contact Business Intelligence.

TEAM CONTENT

Cognos is used for reporting on many different kinds of data. Depending on your role at NMU, you will see a variety of folders.

	Name
☐	📁 Administrative Reports **Finance, Work Study, and Labor**
☐	📁 Art & Design Reports **Department**
☐	📁 Database(s) Password Changes
☐	📁 Orientation Report for Academic Departments **Orientation**
☐	📁 Packages
☐	📁 Templates

In the example on the previous page, the user has access to run reports on:

- Budgets and transactions though the Administrative Reports folder;
- Enrolled Art & Design students through the department folder;
- Incoming students through the Orientation folder.

The kind of data you have access to will determine what folders you see in Team content.

The following folders exist in everyone's view, but are not usually accessed to run reports.

Database(s) Password Changes	Used behind the scenes for data access.
Packages	Data is fed to Cognos using data **Packages**. This folder contains all of the packages you have access to for your reports. Report writers use this folder as a source when creating a new report.
Templates	Templates for report writers to use when creating a new report.

If you only use Cognos to run reports, **please ignore these folders**. Do not try to copy, open, or move them or you may cause an error.

There may also an icon beneath the personal menu called Upload data. **Please ignore it.** At this time, IBM does not provide an option to hide the icon, but if you try to upload a document you will receive an eror.
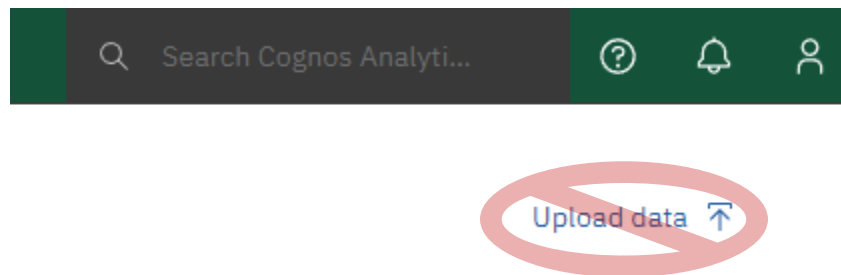
NAVIGATING CONTENT

To drill into a folder, simply click on the title. **Breadcrumbs** appear at the top of the view, so you can easily navigate backwards to a parent folder.

Also, notice the icons to the left of the names (bottom right of the tile if in tile view). You will see either a folder icon ☐ or a colorful report icon to denote the difference between the two. If you access other types of content in Cognos, such as a dashboard or active report, it will also have a colorful icon similar to the one for reports.

Team content / Administrative Reports / Finance Reports

Name	Type
☐ 📁 Current Balance Reports	Folder
☐ 📁 Foundation Finance Reports	Folder
☐ 📁 Month End Reports	Folder
☐ 📁 Transaction Reports	Folder
☐ 📄 Listing of My Organization Numbers	Report

Again, folders appear at the top of the list and reports are displayed afterwards.

RUNNING A REPORT

To run a report click on the title. In this example, we are going to run a report called "Listing of My Organization Numbers." This will return a PDF of all the organization numbers you have access to if you have received finance access from the Controller's Office. As you can see from the breadcrumbs, it is located in Team content / Administrative Reports / Finance Reports.

Team content

Team content / Administrative Reports / Finance Reports

Name	Type	Last Accessed	
☐ 📁 Current Balance Reports	Folder	3/1/2010, 9:08 AM	⋮
☐ 📁 Foundation Finance Reports	Folder	1/14/2016, 8:53 AM	⋮
☐ 📁 Month End Reports	Folder	2/16/2021, 11:23 AM	⋮
☐ 📁 Transaction Reports	Folder	3/1/2010, 9:09 AM	⋮
☐ 📄 Listing of My Organization Numbers	Report	5/10/2022, 12:50 PM	⋮

This will take you to a PDF in your web browser. PDF files have their own settings depending on your web browser extensions. Your menu may look a little bit different depending on which version of Adobe Acrobat/Reader you have.
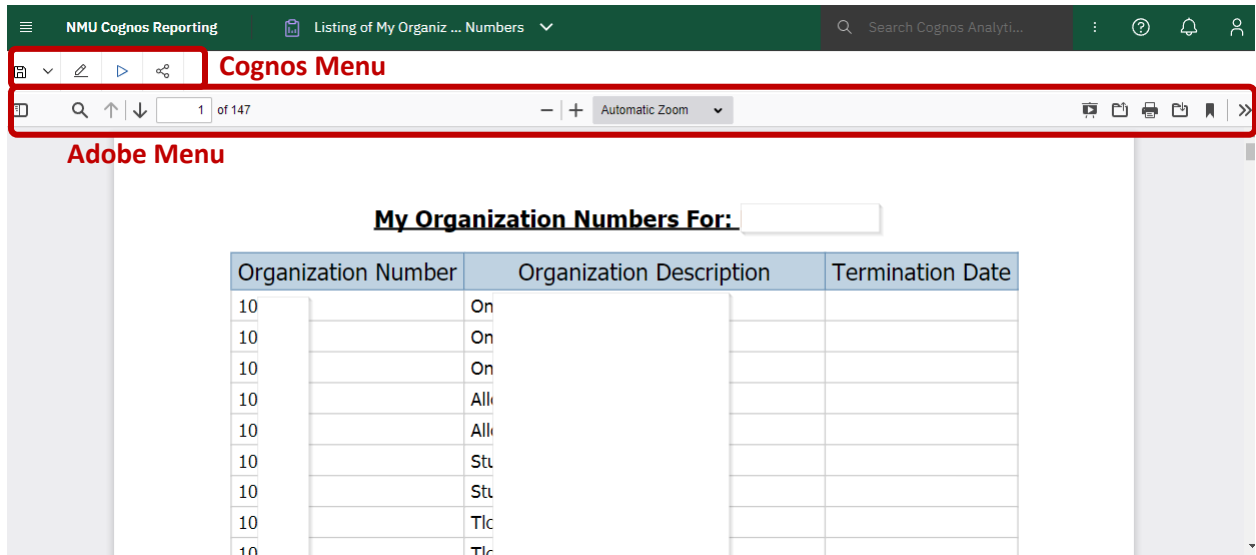
The icons in the upper right of the Adobe menu will display what functions they do when you hover over them. The typical ones you will use are in the middle.
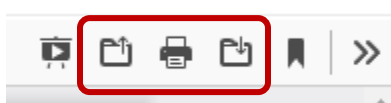
Open File
Opens the dialog box so you can save the report.

Print
This will prepare the document for printing and bring up your browser's printing dialog box.

Download
This will download the report according to your browser's settings.

For example, if you have your web browser set to download documents into your Downloads folder and then open automatically in the appropriate application, you would click this button.

Again, these buttons only appear for a PDF file and may vary depending on your web browser and Adobe settings.

In the upper left side of the **Cognos Menu**, below the top green navigation bar, you will see another set of icons.

To get back to the prompt page, click the **grey triangle** "play" button. Your original prompts should still be showing. **If you make a mistake in your prompts or get a blank report, select this option to re-run your report.**

To refresh your report, click the **circular arrow** button. This will reload the report with the same prompt inputs.

To change the **type of document** you would like your report to be run as, click the **word** that your current document format is in. When you hover over the text, your cursor will display "Select a format."

In the example above, the report is a PDF, so the word "PDF" is in the menu. Click PDF and you will see other options for running the report in a different type of document.

|	
HTML	Run the report in your web browser as a **webpage**.
PDF	Run the report as a **PDF** that will open in your web browser.
Excel	Run the report as an **Excel** document (.xlsx).
Excel data	Run the report as Excel **data** (eliminates styles and formatting).
CSV	Run the report as **CSV** (comma-separated values) file (.csv). This is often used when uploading to a third-party vendor.
XML	Run the report as **XML** (Extensible Markup Language) in your web browser.

Most reports are set to default as Excel (.xlsx) documents that will download according to your web browser's settings. Some reports are also set to default to PDF. If you would like to change the default format of a report, please contact Business Intelligence.

To exit the report, simply click the 4-bar icon in the upper left of the screen to show the dark-colored **Navigation Menu**. You can click **Home** to go to your home page, click **Content** to take you back to Team content, or click **Recent** to show a pop-out list of recent reports.
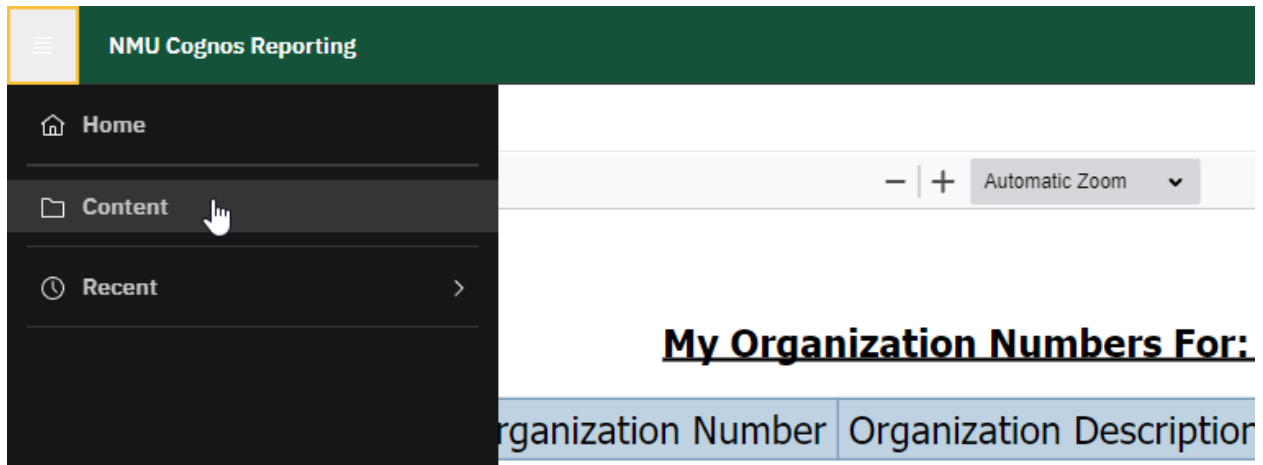
RUNNING A REPORT WITH PROMPTS
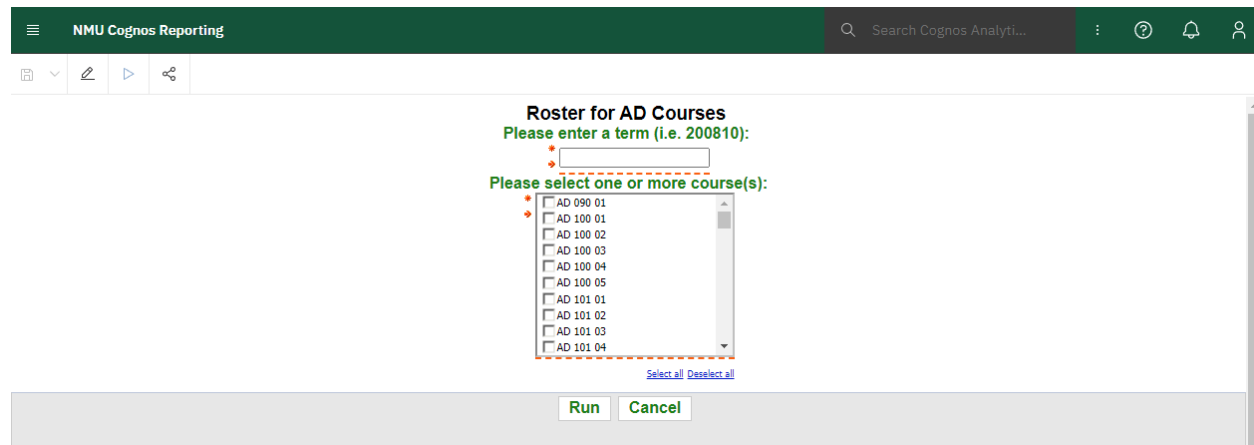
The example above is a report using student data. Terms are based on the year with a suffix of 80 for Fall (starts in August, the 8th month of the year), 10 for Winter (starts in January, the 1st month of the year), and 50 for Summer (starts in May, the 5th month of the year).

An academic year contains Fall, Winter, and Summer in order. The terms for the academic year of 2023-2024 would be 202380 for Fall Semester, 202410 for Winter Semester, and 202450 for the Summer Semester (both sessions).

In the prompts in the example below, the term is for Fall 2022, and then courses are selected using checkboxes. All required prompts with have an asterisk * next to the fields. Click **Run**.
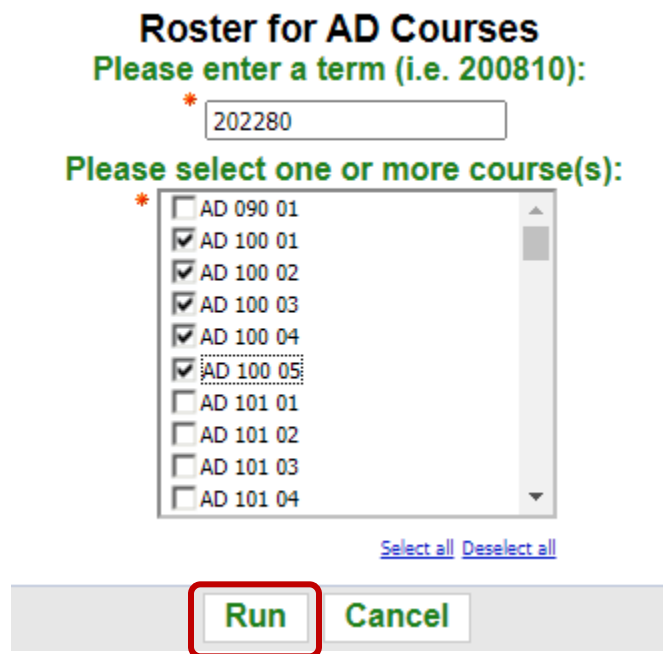
Clicking **Cancel** will take you back to the folder you accessed the report from in Team content.

DOWNLOADING A REPORT

If your report is in an Excel format or a file type not displayed in your web browser, you will be taken to an info page pictured below.
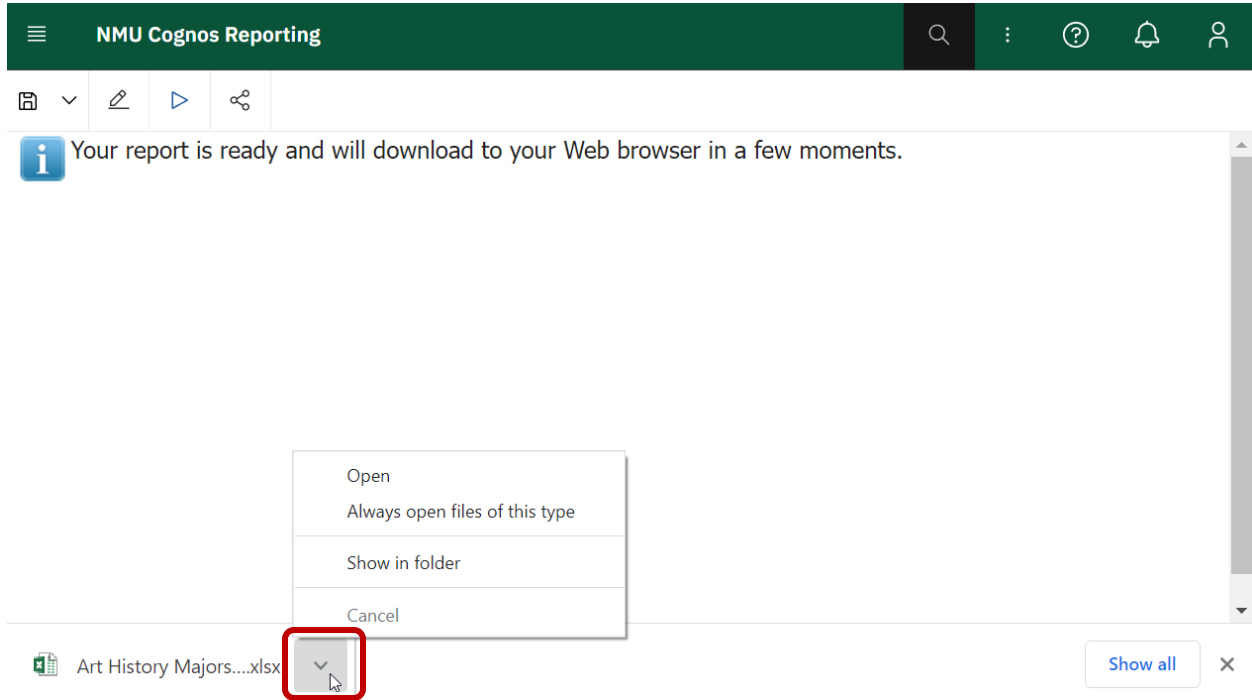
Where your file is downloaded and what your browser does with it depends on your web browser's settings. The default is to download to your Downloads folder. Click the arrow **down arrow** next to your download to see your options.

You can manually open the file by clicking **Open**. If you want your computer to automatically open every type of document you download (extension-specific, such as .xlsx or .docx), click **Always open files of this type**. To see where the report was saved, click **Show in folder**. This is handy if you save your files somewhere else besides the Downloads folder.

Otherwise, you can find your reports in the Downloads folder by opening a folder and going to **Quick access**. The path is C:\Users*your user id*\Downloads.
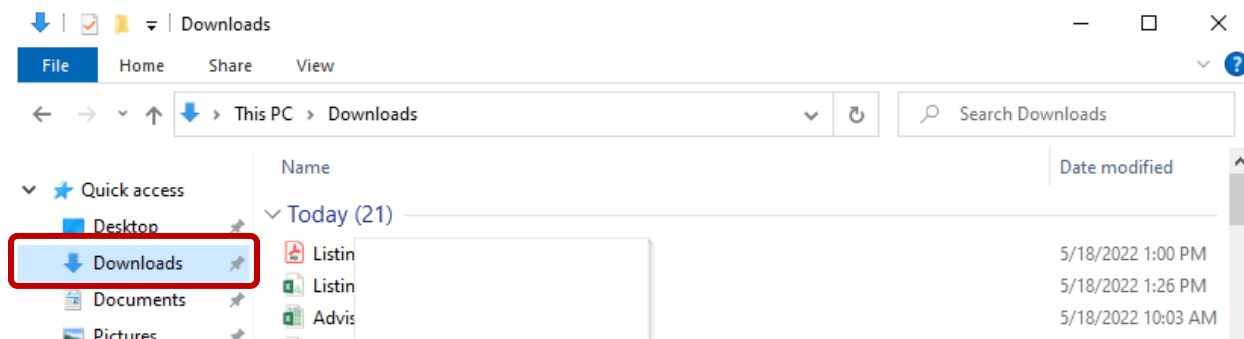
Chrome Only

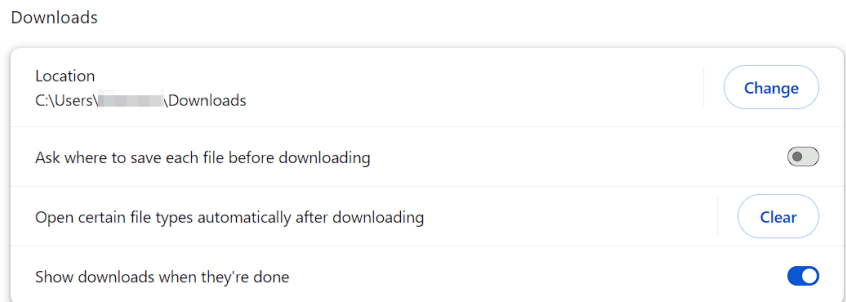To change your download preferences, go to the settings in your web browser. In Chrome, click the 3-dot button in the upper right of the screen next to your profile. Scroll down and select **Settings**.
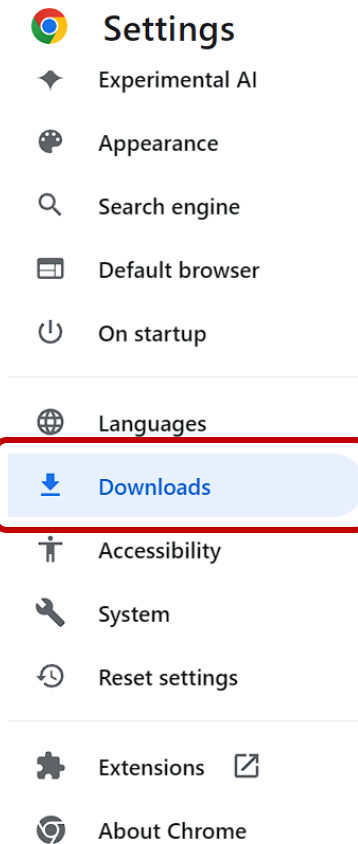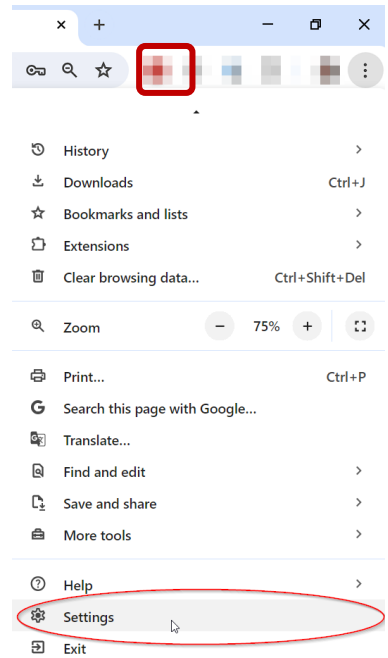
The settings page will open and a menu is on the right. Scroll down and click **Downloads.**

You can change the **Location** of where you want downloaded files to be saved. You can have Chrome **ask you where** you want to save your file everytime before the download begins. You can also **clear** what types of files you have set to open automatically in their respective applications.

These settings apply to Chrome, so whatever changes you make are not just for Cognos but for every file you download in your web browser.

EXITING COGNOS

To exit Cognos form any screen, click the person icon in the upper right corner of the green **Navigation Menu** and click **Log out**. This will take you back to the login page.

If you forget to logout your session will eventually expire after no activity.
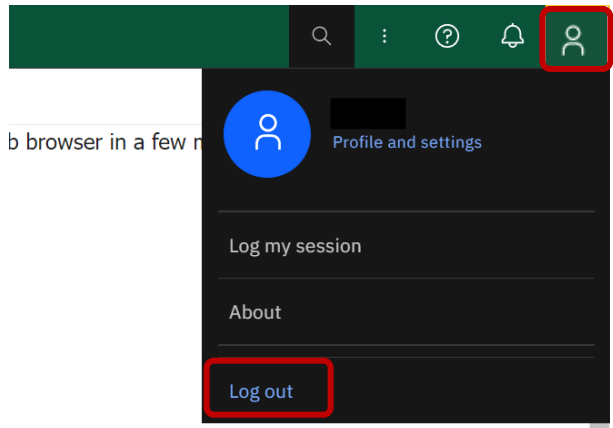
ERRORS

A common error will say something similar to "Unable to load view," or you may just get a blue circle. The best way to fix this is to clear your cache.

Close any tabs you have open with Cognos in Chrome. Go to the 3-dot menu in the upper right corner. Click "Clear browsing data…"
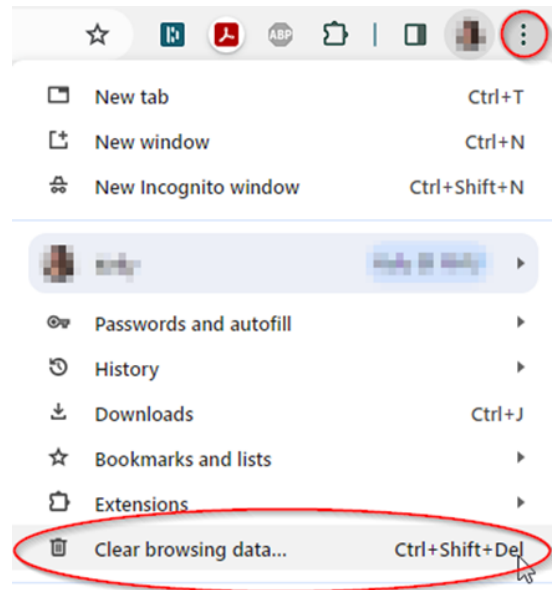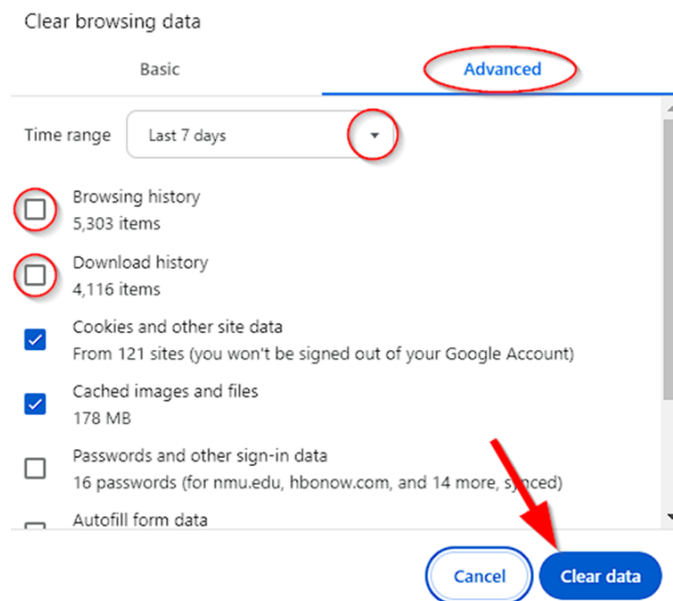
Make sure you are on the Advanced tab. Make sure Cookies and other site data and Cached images and files for the past 7 days (or the time frame since you last experienced the error) are checked.

Then click **Clear data**.

You can also use an incognito window. Cognos always works in an incognito window. To access a **New Incognito window** click on the 3-dot menu in the upper right and select New Incognito window. This will bring up a blank, fresh session.

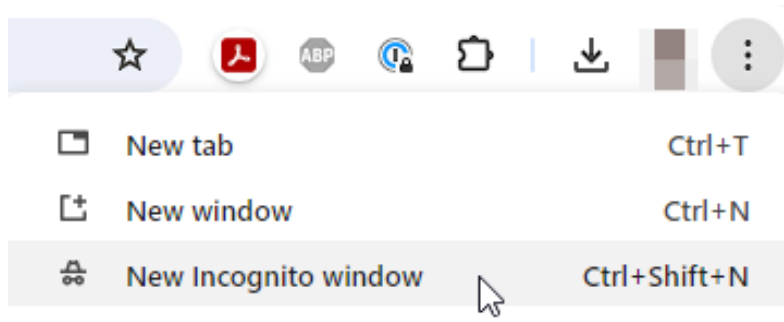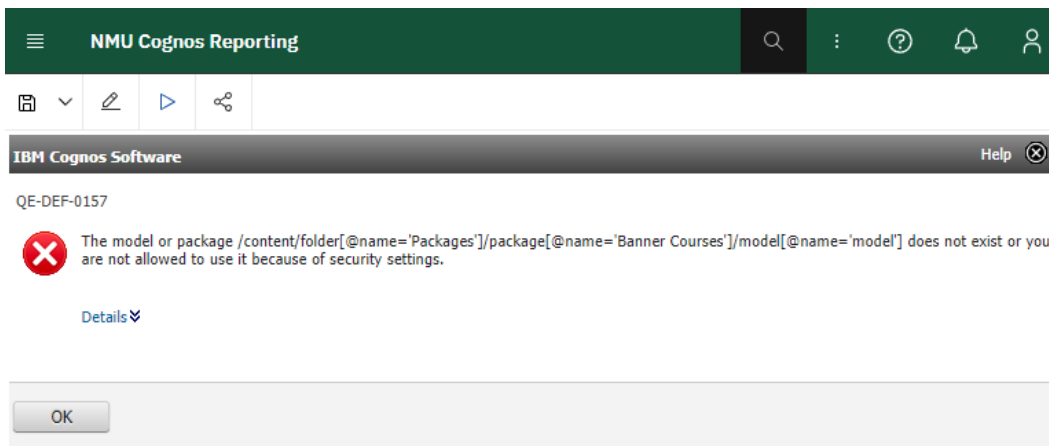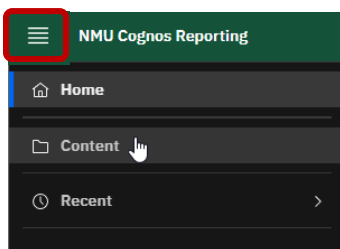

Sometimes, you may run into an error due to security or server settings. An error will look something like this:

If you receive an error message, click **OK**. You will return to your home page (which is usually your recent reports). **Please log out, close Chrome (or your web browser) completely, re-open Chrome, and log in again.**

Try to re-run the report by going through **Content**. Select the 4-bar icon in the upper left green Navigation Menu and click **Content**.

Going through the **Content** folder and re-selecting the report ensures that Cognos is not stuck in a loop of trying open an errored-out report over and over again.

If you receive an error again, please reach out to Business Intelligence, preferably with a screenshot of the **Details** of the error.

Please click the blue **Details** to show the complete text of the error message. You can take a screenshot by pushing the **PrtSc button** on your keyboard (Alt and PrtSc for the active screen if you use multiple monitors). This will automatically copy the image to your computer's clipboard.
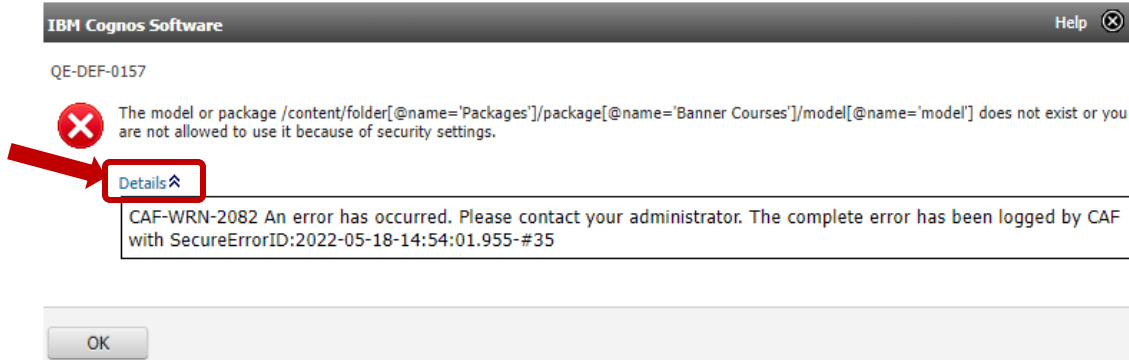
Switch to Gmail and compose a new message. In the body of your email, hold the **Ctrl** and **V buttons** to paste the screenshot image. Give the **report title** and **folder location** of the report. Also include any input you are using for prompts. Send it to Kelly Larmour (klarmour@nmu.edu) or Genevieve Morgan (gmorgan@nmu.edu). Someone will reply to you during business hours.
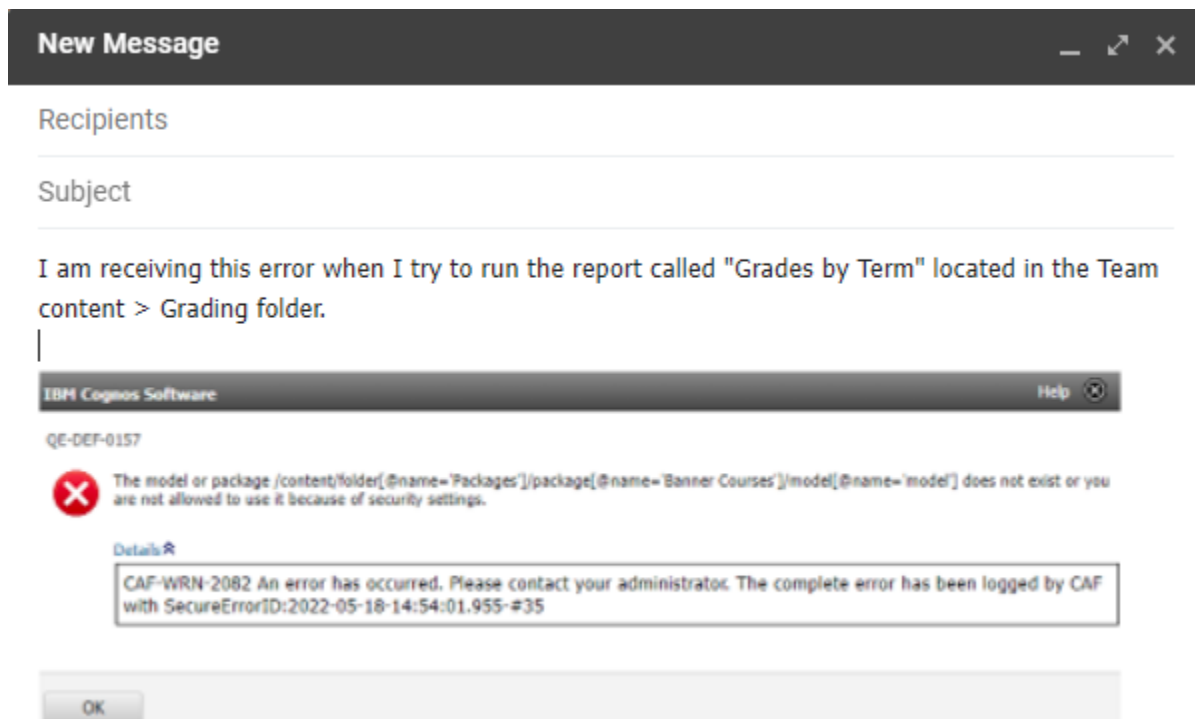
Back in Cognos, click **OK** to return to the home page.

EMPTY OR BLANK REPORTS

Sometimes a report will open with only a title and no data. This is often because a user has entered the wrong prompts. **Always follow the formatting provided in prompt examples.** Financial fiscal years are entered differently than Financial Aid year packages, which are formatted differently than academic semester terms. It all depends on how the data is formatted.

Here is an example of a prompt used for a report using finance data:

Type 2-digit Fiscal Year (example 07)

*
22

## Enter Six-Digit Organization Codes (no dashes), & Click Insert After Each

* Choices:
000000

Insert ➡

⬅ Remove

Select all Deselect all

then Click Run Report

Run Report   Cancel

In the example above, the fiscal year is July 1, 2021 to June 30, 2022. Our finance data records fiscal years using the last two digits of the year-end date, which is 22. In the second prompt, even though your organization number may contain dashes or a prefix, only enter the 6-digit number without formatting. If you do not follow the examples on the prompt page, you will end up with a blank report.

	A	B	C	D	E	F	G
1	FY = 22						May 18, 2022
2				Northern Michigan University			
3				Banner Finance System			
4				Current Organization Financial Statement			
5							
6				Organization: -			
7	Acct Code	Account Code Description	Base Budget	Revised Budget	Year to Date Activity	Open Commitments	Balance Available
8					1		
9							

Notice that the report example above has blank fields.
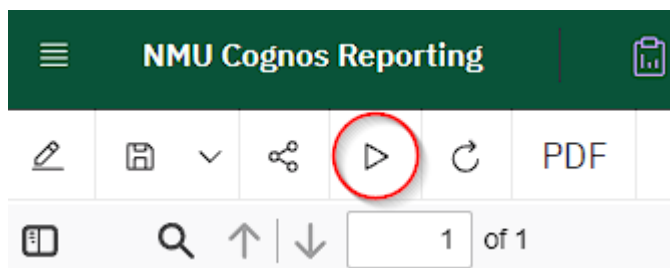
If you receive a blank report, click on the **grey triangle** "play" button in the upper left green navigation menu. This will take you back to the prompt screen.

If you ever get stuck where a report keeps downloading and you are unable to get back to the prompt page, choose the same option to **Reset prompts and run**.

REPORT REQUESTS

We want your reporting to be simple and efficient. If you find yourself switching between formats often, or opening a report in Excel to sort or format your data in a certain way, contact Business Intelligence so that we can help you get **exactly** what information you need in the format you want it. We don't want you to download a report and then have to spend 30 minutes editing a document in Excel to perfect it. Feel free to contact us to:

- Change the name or location of a report;
- Change the default setting of the report (PDF or Excel);
- Change the way data is displayed (such as a middle initial, date, alphabetical sorting, etc.);
- Change the grouping of a report (make all cells equal sizes for sorting in Excel);
- Schedule a report to be sent by email;
- Or anything else!

To request a new report, please reach out to one of us in Business Intelligence.

Kelly Larmour (x1914)	**Jenna Morgan (x1254)**
klarmour@nmu.edu	gmorgan@nmu.edu
Specializes in:	Specializes in:

Kelly Larmour specializes in:
- Student and Human Resources data
- Detailed reporting
- Cognos access and password changes

Jenna Morgan specializes in:
- Admissions, Finance, Purchasing, and Financial Aid data
- Group/count reporting

When requesting a report, please tell us precisely what you are looking for:

- **Target your data.**
    - Think about specific codes and filters. Do you know your major codes in your department? Do you know what specific fields in Banner you are looking for?
    - Examples: all BIOL majors with more than 95 credits and a 3.5+ GPA, all currently enrolled undergrads with a minor in Gender Studies, the number of students admitted for a term for specific majors in your department.
- **Include the fields you want generated in the report.**
    - Typically, there are two kinds of reports, detailed and counts. Detailed reporting will give you a list of specific individuals on a report, while counts will simply give you a total number of individuals who meet the criteria you specified.
    - Examples: First Name, Last Name, NMU IN, Major, Email, count of students on academic probation, number of admitted students in department.
    - **Note:** If you are requesting data from outside of your department or non-directory information (like GPA), we may require you to state the business purpose of your report in an email to the Registrar for approval.
- **Tell us if there is a similar report.**
    - It can be very helpful if you can direct us to a report that already exists so that we don't have to start from scratch.

- **Tell us what you want the report to be called and where you want it to be located.**
  - We try to name reports as logically as possible, but if you want it to have a specific name and be stored in a certain folder, please let us know.
- **Give a time frame of when you need your report.**
  - Please be reasonable when requesting a report. There are some reports that take priority over others, depending on necessity. Typically, it is first-come, first-serve.
  - Unforeseen events, such as server outages or upgrades, may delay reporting.

If you're unsure if we would be able to obtain the data you are looking for, please don't hesitate to contact us over the phone to talk it out.