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Cognos Analytics Conversion – version 10.2.0 to version 11.0

Timeframe:

- Cutover to version 11 – September 19th

What does cutover mean to you?

- Shortcuts/bookmarks to Cognos need to be updated to:
  https://bianalytics.ucsd.edu/ibmcognos/bi

- No longer use Internet Explorer as web browser. Use Firefox or Chrome!!!

- Cognos 10.2.0 will no longer be available to Health Sciences report users

- Brand new user interface with version 11
Cognos Analytics (version 11.0) Overview

• Single, simplified, unified portal for all tools
  o Portal uses a series of sliding panels instead of tabs and folders
    ▪ User experience is the same on all devices
    ▪ More intuitive and interactive

• New Smart Search
  o Fully indexed resulting in quicker results
    ▪ Similar to Google search, returns results as you type
    ▪ No wildcards are needed
  o Searches can be saved for future use
  o Search results can be filtered by content type (reports, dashboards, folders etc.) and by date

• Recently Used Files

• Personalization Opportunities
  o Set home page

• On-Screen Hints/Coach Marks
New sign on screen:

Cognos Analytics Portal:

Toolbar

Navigation Panel
Navigating the Cognos Analytics User Interface (UI)
The goal of the new UI and navigation panel is to provide users with a streamlined way to view content and activities pertinent to them.

Navigation Panel.
On the left side of the UI is the main Navigation Panel. This navigation panel is present on the UI at all times and updates dynamically as the user works with the various capabilities within Cognos Analytics.

Indicates a hint is available

1. **Search.** The New Smart Search in Cognos Analytics provides a modernized search engine that uses a smart, intent-driven search algorithm to assist the User. **Click on Search** to open the search panel. As you type, an auto-fill feature will launch and render search suggestions for related terms. **Click** outside the Search panel to close it. Searches can be saved or filtered.
2. Team Content (was Public folders in version 10.2.0). The Team Content folder contains all Health Sciences reports and data downloads the user has permissions to view. Click on Team Content to open the navigation panel. Notice there is a list of folders. Click outside the Team Content panel to close it.
More – Displays Properties, etc. of folder Right-click on the folder provides the same function

Switch Views – Displays details (wide or narrow)

Narrow View:

Wide View:
Display Cognos Reports and Download Raw Data

To display Finman Health Sciences reports in HTML format, double click the report name.

Profit & Loss Summary report:
To display FinMan Health Sciences reports as PDF or Excel, highlight the file name and click the More to the right of the file name and select the option to “Run as”.
Another way to run the reports in a different format is to just click on the report which you want and when it gives out the html version, click the play button on the top left corner and select the format you want.
4. **Recent.** The Recent button shows the user the most recently used list of content, up to 20 objects (reports, dashboards, data modules, etc.). Objects appear in order based on most recently used. Once an object is viewed, it will move to the top of the list. **Hover** your mouse over the icon to the left of each object to identify the type of object. **Click** outside the Recent panel to close it.

5. **New.** The New button allows the user to create a new report, dashboard or data module. We will set up trainings for this soon.

6. **Upload files.** The Upload files button allows users to upload Excel files for quick analysis and visualizations. Excel XLS, XLSX and CSV files may be uploaded. **Note:** Only the first tab of a multi-tabbed spreadsheet will upload. Save each tab as a separate file if you want to upload multiple tabs of data. Size limit is 100MB.

   We will set up trainings for this soon.

7. **Notifications** – If the user subscribes to a report or report view, the user is notified every time the report is re-run. Currently not used by Health Sciences but will put into place at a later date.
**Toolbar**

1. **Welcome** – Navigates the user to his/her Home Page. The user may set one or multiple reports, dashboards or queries as home pages.

2. - Sets the user’s home page(s)

3. **User Logon (Personal Menu)** - Sets user preferences and manages subscriptions.
Other Training/Reference Resources:

1. Click the IBM Cognos Analytics icon. Help takes the user to the IBM Cognos Analytics Community
   http://www.ibm.com/communities/analytics/cognos-analytics/

2. Cognos Analytics website in Blink which includes link to a training environment (mostly for report developers):
   http://blink.ucsd.edu/technology/bi/cognos/index.html