

# Cognos® Report Primer

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## Obtaining Permission to Run Cognos® Reports

Before you begin, you need:

1. A valid login to the PDE web portal; and
2. Permission to run Cognos® reports.

You may register online to obtain a PDE web portal login. The steps are listed below.

1. Navigate to [www.education.state.pa.us](http://www.education.state.pa.us).
2. Click on the **Register** link (see below).



3. Complete the Registration Screen. You must fill in the required fields

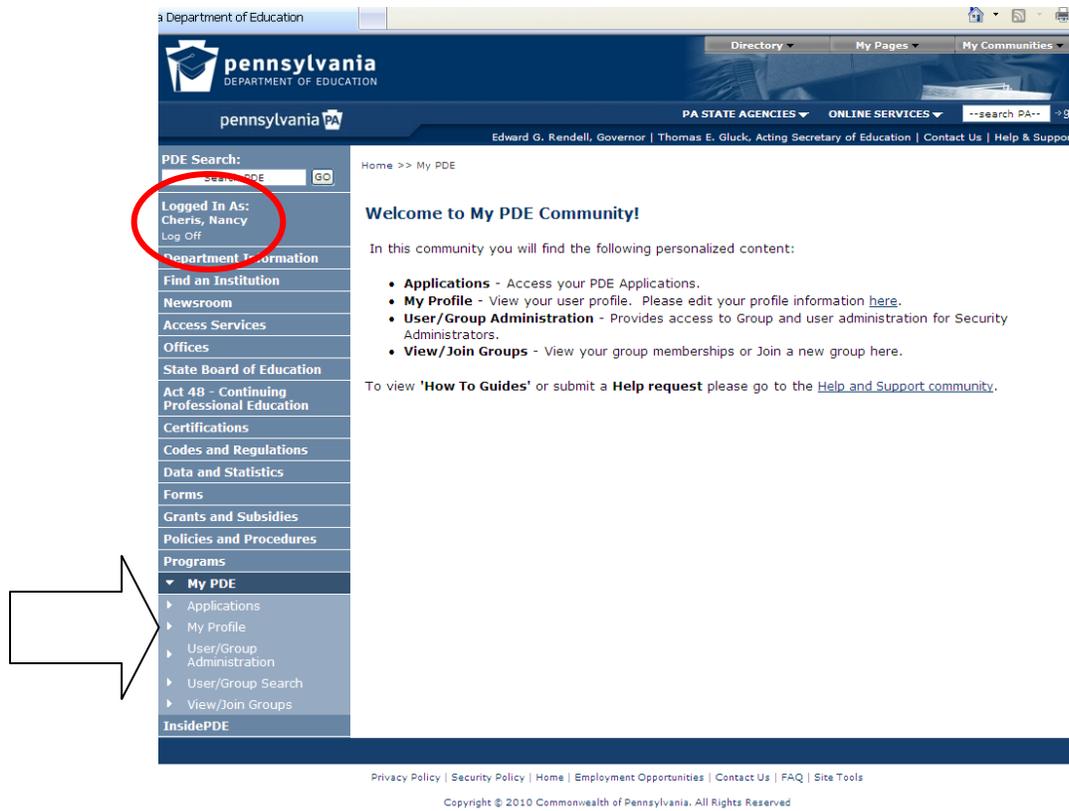
A screenshot of the registration screen on the PDE web portal. The page has a blue header with the 'PA pennsylvania STATE OF INDEPENDENCE' logo. On the left side, there is a yellow sidebar with links for 'Login', 'Register', and 'Forgot Password'. The main content area is titled 'Register' and contains a form with the following fields: 'Name Prefix' (dropdown menu), 'First Name' (text box), 'Last Name' (text box), 'Name Suffix' (dropdown menu), 'Company' (text box), 'Title' (text box), 'Address1' (text box), 'Address2' (text box), 'City' (text box), 'State' (text box), 'Zip' (text box), 'Phone' (text box), 'Fax' (text box), 'Email Address' (text box), 'User ID' (text box), 'Password' (text box), 'Confirm Password' (text box), 'Question' (text box), and 'Answer' (text box). Red asterisks (\*) are placed to the right of the First Name, Last Name, Address1, City, State, Zip, Email Address, User ID, Password, Confirm Password, Question, and Answer fields, indicating they are required. At the bottom of the form, there are 'Start Over' and 'Register' buttons. A note at the bottom right states: '\* Denotes a required field.'

designated with a red asterisk (\*).

4. Click on the **Register** button at the bottom of the screen.

Once registered, you must update your profile to make it active.

1. Close your browser window, reopen it and navigate back to [www.education.state.pa.us](http://www.education.state.pa.us).
2. Click on the **Log In** link.
3. Click on **My PDE** near the bottom of the navigation panel on the left.



4. Click on **My Profile** in the sub-menu that opens and complete the **User Profile** screen.

This completes your one-time registration setup.

After completing the registration and activation process, contact the PIMS Security Administrator at your local education agency [LEA]. The Security Administrator, who is a staff member at your district, school or institution, will give you access to Cognos® reports, PIMS or other PDE applications.

**Tip:** Whenever you log in during future sessions, make sure the upper left corner of the screen displays "Logged in As:" as circled in red in the screenshot above. Applications will not work if you are not "Logged in As:" properly.

## Cognos® Reports Security Roles

The table shown below lists the security roles we currently have in COGNOS.

<b>Role</b>	<b>Description</b>
District All	User can view all PK-12 reports for his/her district.
District All Except School Safety	User can view all PK-12 reports with the exception of School Safety reports, for his/her district
District Staff All	User can view all PK-12 staff-related reports,, including HQT reports, for his/her district.
District Staff HQT	User can view PK-12 reports relevant to Staff HQT only, for his/her district.
District Student All	User can view all PK-12 student-related reports, for his/her district.
District Student Assessment	User can view PK-12 assessment reports only, for his/her district.
District Student Child Accounting	User can view PK-12 child accounting reports only, for his/her district.
District Student Course	User can view PK-12 course reports only, for his/her district.
District Student CTE	User can view PK-12 CTE reports only, for his/her district.
District Student Enrollment	User can view PK-12 enrollment reports only, for his/her district.
District Student Grads Dropouts	User can view PK-12 graduation and dropout reports only, for his/her district.
District Student Low Income	User can view PK-12 low income reports only, for his/her district.
District Student LEP	User can view PK-12 LEP reports only, for his/her district.
District Student School Safety	User can view PK-12 school safety reports only, for his/her district.
District Student Special Education	User can view PK-12 special education reports only, for his/her district.
District Aggregate	User can view PK-12 aggregate reports, for his/her district.

## Accessing Cognos Reports

1. Navigate to [www.education.state.pa.us](http://www.education.state.pa.us).
2. Log in to the portal (Figure 1).



Figure 1

3. Use the pull down menu at the bottom of the navigation link list to select **PIMS Reports** (Figure 2).
4. Click on the **GO** button (Figure 2).

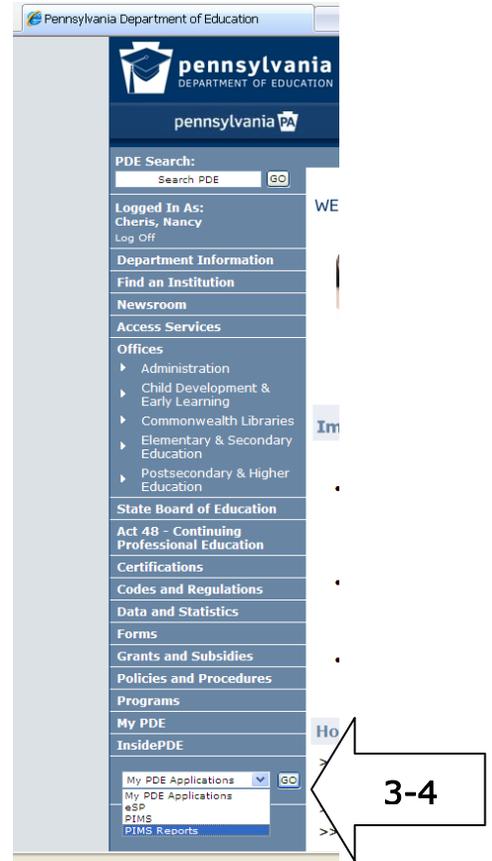


Figure 2

Cognos® Public Folders Home Page will open in a new browser window:

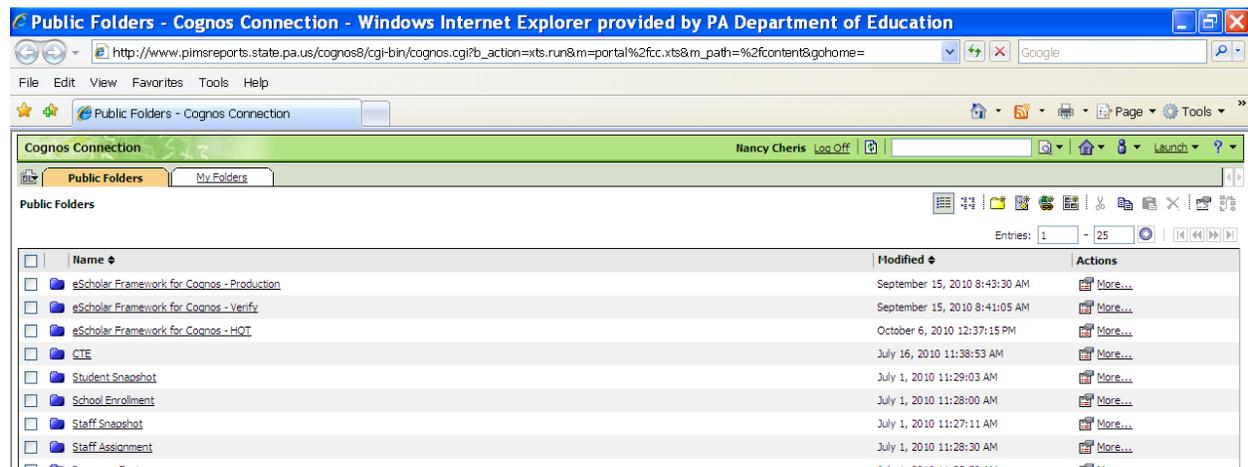


Figure 3: PUBLIC FOLDERS HOME PAGE

**Tip:** If you see a Welcome screen, you may click the box to bypass the screen in the future before continuing to the home page shown above.

## Report Overview and Conventions

There are two types of reports used in PIMS reporting: Verify and Production. We use the conventional path notation to identify the location of reports. All navigation begins from the Public Folders Home Page, which is referred to as "Public Folders". Subsequent levels requires a left click to proceed; levels are separated by a ">" symbol.

To navigate to verify reports from the Public Folders Home Page, simply left click on the eScholar Framework for Cognos – Verify link. The notation for this is either:

- Public Folders > eScholar Framework for Cognos – Verify; or
- Public Folders > Verify.

Navigational instructions for production reports are similar:

- Public Folders > eScholar Framework for Cognos – Production;
- Public Folders > Production; or simply
- Production.

Production reports will not reflect changes until after a data refresh.

**Tip:** You may click on any part of the path at the top of the report list to jump to another section. For example, to switch between production and verify, click on the Public Folders link at the top of the screen and then on the eScholar Framework for Cognos – Verify link.

### Verify Reports

We recommend that you run the Verify reports immediately after each successful batch upload. There are two reports for each template, a summary and details report. These reports, when run in Excel<sup>®</sup> format, provide an accurate reflection of the data in the warehouse. A green check during the upload is a positive indicator; however, it does not indicate that 100% of your data made it to the warehouse. Thus, running and carefully checking the verify reports is the only way to make sure your data are complete and accurate.

Verify reports may be accessed from Public Folders > eScholar Framework for Cognos – Verify or, in some collections, through shortcuts provided in the production report folders. Regardless of how the verify reports are accessed, they never require a data refresh. In fact, they may run during the refresh.

An Excel® or Delimited text (CSV) format is recommended for all verify reports. Navigation for many template details reports is **Public Folders > Verify > Validation Reports > Template Verification**. Child Accounting verify reports are all located in Public Folders > Production > Child Accounting Reports in the two Validation folders. The details report provides individual data with descriptions and in a different sequence from your batch upload. You cannot upload corrected verify report data as a batch file.

**Tip:** Run the summary report to see if all schools within your LEA are represented. Run the details report to review the individual records.

## Production Reports

Production reports are recommended as the next step after reviewing the verify reports to:

- Review the data in multiple templates;
- Check for completeness;
- Check for accuracy;
- Identify errors and omissions for correction; and
- Print the Accuracy Certification Statement (ACS).

Production reports do NOT reflect data upload changes immediately. The production reports must be run after a data refresh. Data are refreshed in PIMS twice daily between 5:30 and 7:00 AM and then again between noon and 1:30 PM. You can not run reports during the data refresh. If you try to run a report while the data are refreshing you will see an Error 121 screen. Log out and wait to run the report at a later time.

There are a variety of reports for each PIMS collection. Navigation may be simple, such as Public Folders > Production > CTE Reports. Most collections have nested folders such as the professional staff collection:

- Public Folders > Production > Staff Profile Reports
- Public Folders > Production > Staff Profile Reports > Error Reports
- Public Folders > Production > Staff Profile Reports > Verify-Validation Reports.

Each collection is different so be sure to take advantage of all reports.

**Tip:** The **Accuracy Certification Statement**, or **ACS**, is a production report. If your collection requires an ACS submission run this report early in the collection cycle so that you have time to correct errors before the collection ends. A list of ACS and due dates is included in the front of the PIMS Manual, Volume I. Select the PDF format for all ACS reports.

## Report Formats

You may select the report format each time you run a report when using the recommended "Multiple Reports" method. Some reports run best in a specific format. When guidance is not provided, the following general selections may be applied:

Format	Generally Recommended for:
HTML	
PDF	Accuracy Certification Statements.
Excel 2007 Excel 2002	Verify and Production Reports other than ACS
Excel 2000 Single Sheet	Not recommended unless this is your only Excel option.
Delimited text (CSV)	Large verify details reports that are easier to review in Access or other database.
XML	

**Tip:** You may set your format preference to save time. See the Customization section at the end of this document for instructions.

## Time-Out Errors

Cognos times out when inactive for a period of time. Close the Cognos window and the PDE portal window when this occurs. You may log into the portal and then start a new Cognos session after closing both windows.

**Tip:** click on a navigation link at the top of the page or the refresh button periodically to avoid time-out errors.

## Running Reports

There are two ways to run a report. The method described under Multiple or Scheduled Reports is recommended. It has a few more steps, but actually saves time and resources.

### Multiple or Scheduled Reports (Recommended method)

1. Navigate to the desired report. Do NOT click on the report name.
2. Click on the blue triangle ► under the **Actions** column across from the desired report name (See Figure 4).

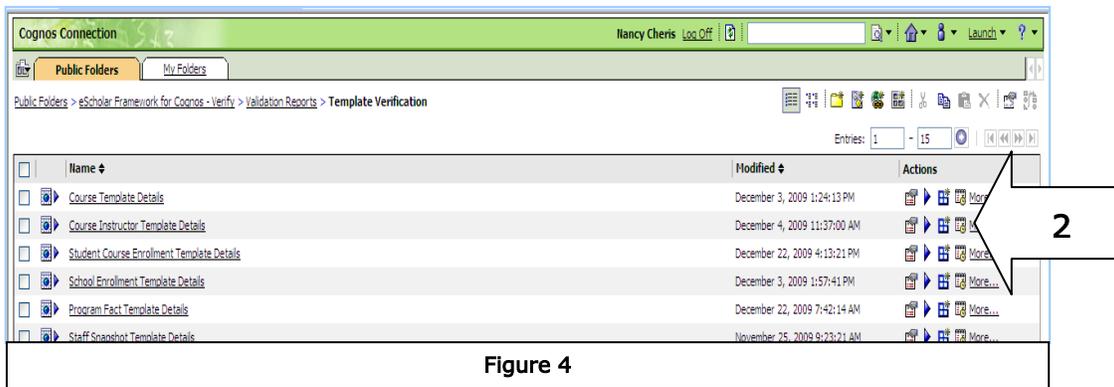
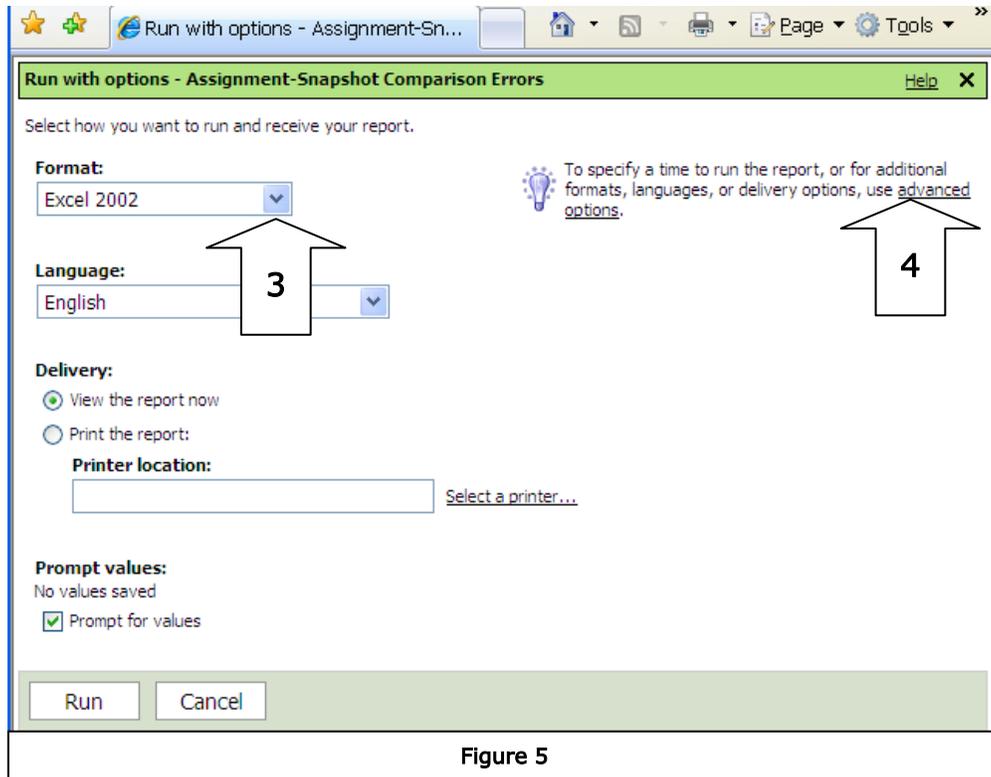


Figure 4

3. Select the **Format** using the pull-down menu (See Figure 5).



4. Click on the **advanced options** link (See Figure 5).
5. Under Time and mode, select **Run in the background:** (See Figure 6).

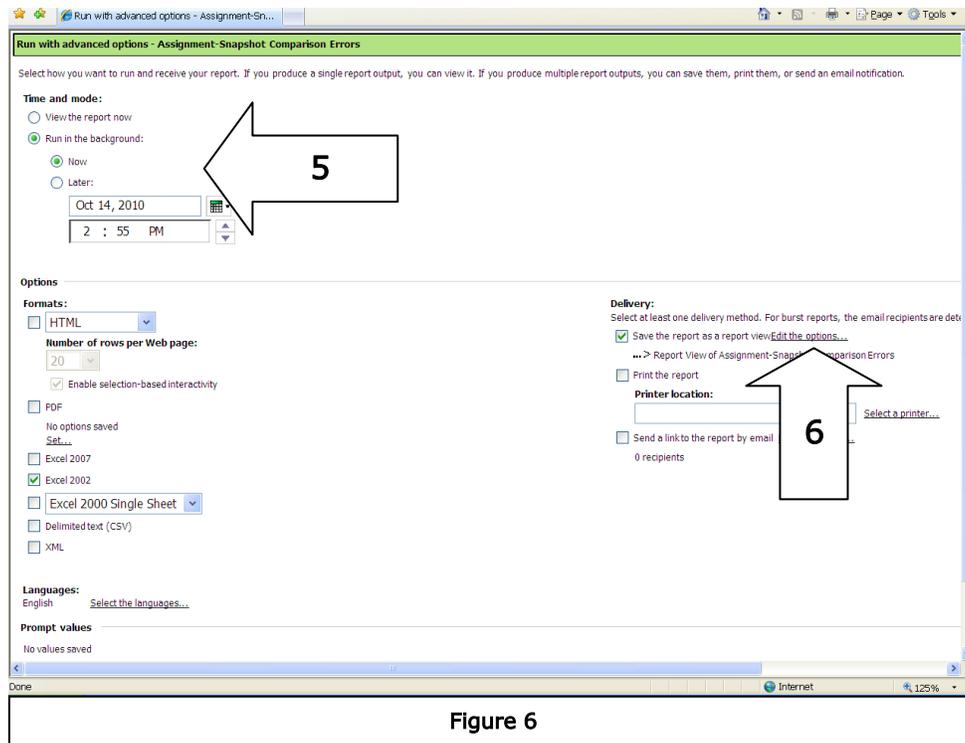
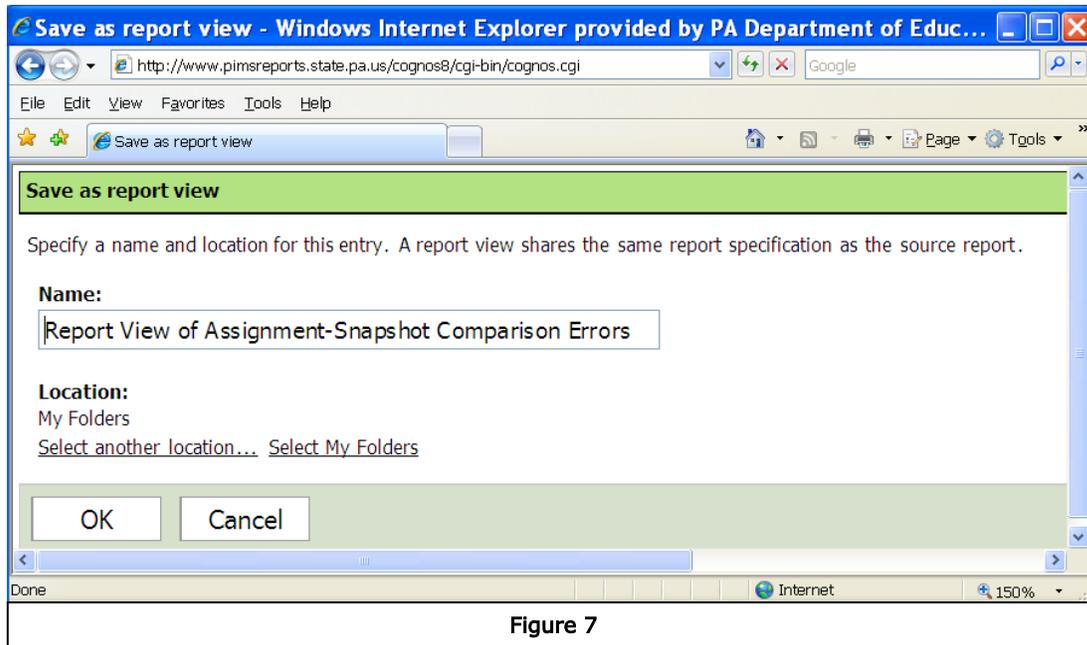


Figure 6

- a. To run the report immediately, go to step 6, as “Now” is the default.
  - b. To run the report in the future, such as after the next refresh, click on the **Later** radio button and enter the desired date and time.
6. Confirm or change the **Formats** under the Options section.
  7. If you want to adjust the report name, click on the **edit the options** link (See Figure 6 above) to access the Save as report view screen (See Figure 7 below). Change the name then click on the **OK** button to return to the Run with Advanced Options screen.



8. Click on the **OK** button at the bottom of the Run with Advanced Options screen and wait a few seconds until the selections screen appears.
9. Respond to any filter selections, which will vary by report. This may include school year, snapshot date, etc. You may have to click on the **Next >** button to complete all filter selections.
10. Click on the **Finish** button to run the report. You will automatically return to the list of report screens where you began because your report is either running in the background or scheduled to run at a later time.
11. Repeat for additional reports as desired.

**Tip:** Your reports will be placed in the **My Folders** tab when finished.

## Single Reports (NOT recommended))

If you only need to run one report, you may navigate to the desired report and click on the underlined report name (link).

- Click on the selection criteria, such as District, School Year, Snapshot date and use the **Next>** button if it applies;
- Click on the **Finish** button;
- Wait and watch the hour glass spin until your report appears.

**Tip:** This method is **NOT RECOMMENDED** because it:

1. Ties up your computer;
2. Does not let you choose the format before running the report; and
3. **Takes more resources slowing down all users statewide.**

We encourage you to use the multiple or scheduled reports technique.

## Using My Folders

Reports run in the background using advanced options are inserted into the My Folders tab in Cognos®. You may switch between the Public Folders and My Folders by clicking on the desired tab.

## One-time Setup

Some computers are set up to work with My Folders reports. If you click on the report name (link) in My Folders and the File Download “Open/Save” window appears, your computer is already set up and you may skip this section. If, however, you click on any report name (link) in My Folders and nothing appears to happen within a few seconds, you need to complete the setup instructions that follow. This process may be needed on each computer that you use with Cognos®.

1. Confirm or change your Popup Blocker settings.
  - a. Click on the **Tools** menu above the Cognos Connection near the top of your screen (See Figure 8).

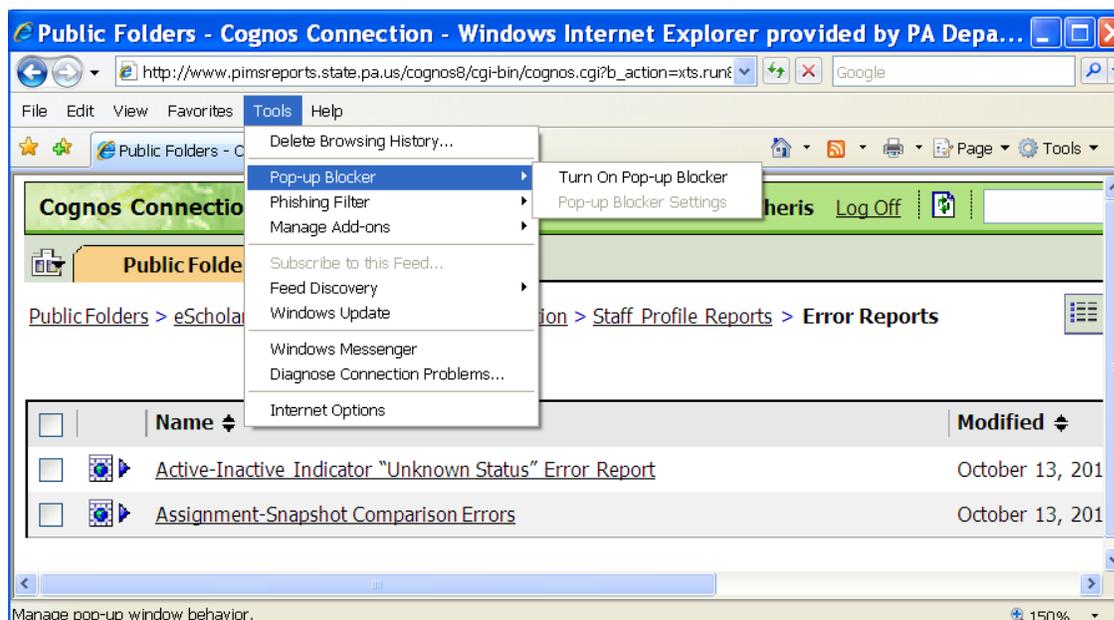


Figure 8

- b. Click on the **Pop-up Blocker** option. If your screen looks like Figure 8, press the Escape key. If your screen displays “Turn Off Pop-up Blocker” click on that message.
2. Confirm or Enable your Downloads settings.

- Click on the **Tools** menu above the Cognos Connection near the top of your screen (See Figure 8).
- Click on the last menu option, **Internet Options**.
- Click on the **Security** Tab (See Figure 9).
- Click on the **Internet** icon (globe).
- Click on the **Custom level...** button.
- Scroll down until you reach the **Downloads** section in the Security Settings – Internet Zone window (See Figure 10).

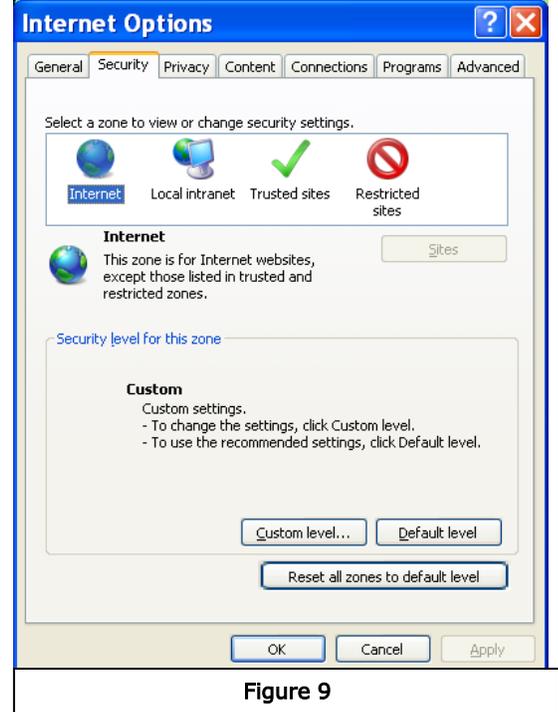


Figure 9

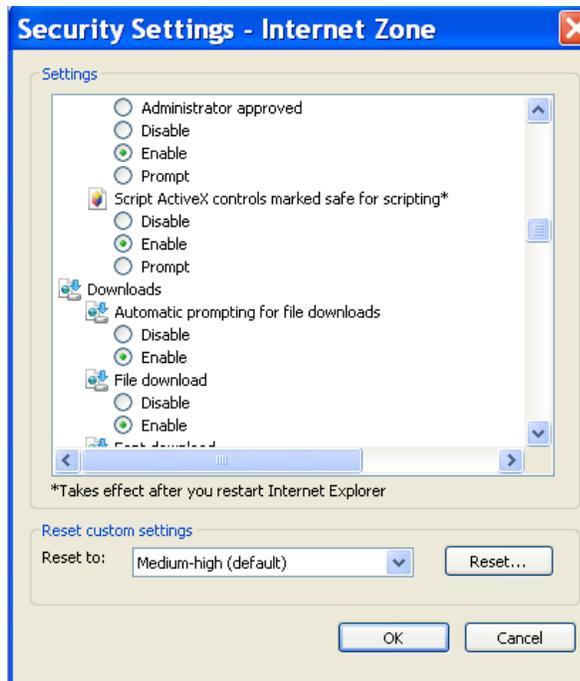


Figure 10

- Locate **Automatic prompting for file downloads** and click the **Enabled** radio button if currently disabled.
- In the next group, **File download**, click the **Enabled** radio button if currently disabled.
- Click on the **OK** button on the Security Settings screen and again on the Internet Options screen and you should be back at the My Folders window.

**Tip:** Contact your school's network administrator or technical support person for assistance if you have trouble or are unable to follow these instructions.

## Saving or Opening Reports in My Folders

1. Click on the **View Outputs** icon  under the Actions section to display or download each report (See Figure 11).

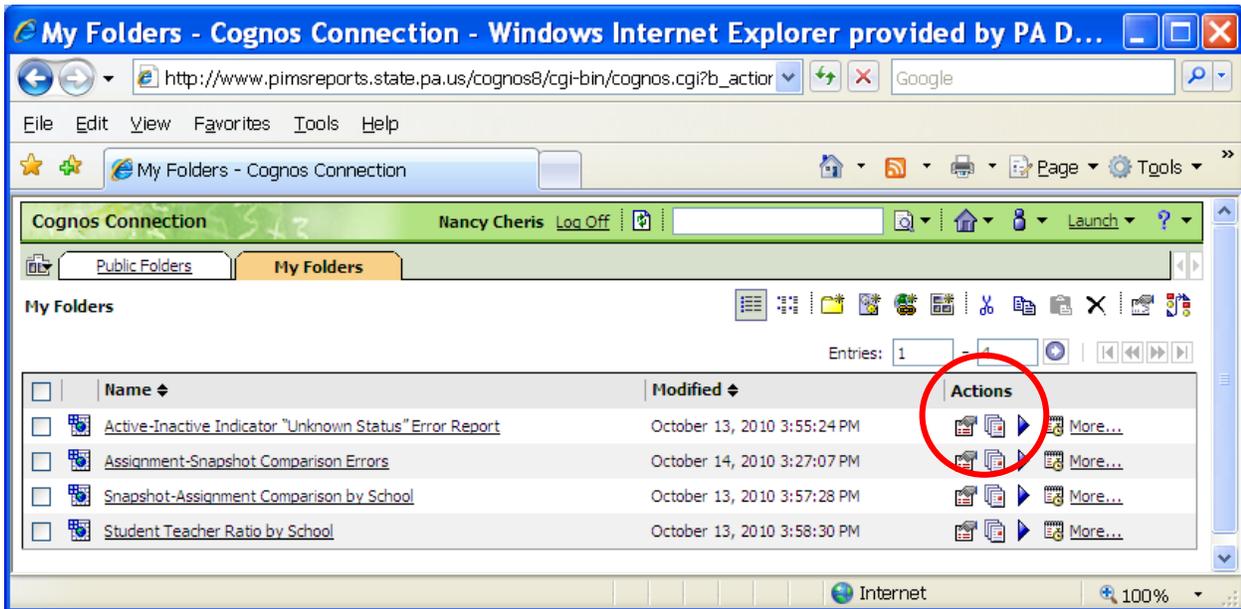


Figure 11

2. Click on the **Download** icon on the View report output versions ... screen (See Figure 12).

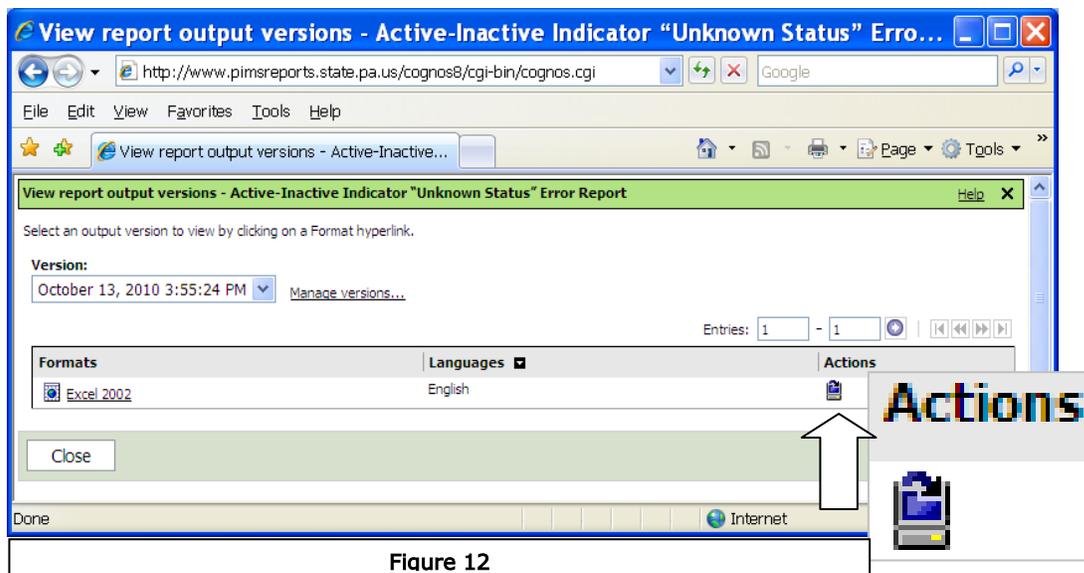


Figure 12

3. When the File Download window appears (Figure 13), click on the **Open** button to display the report or on the **Save** button to save a copy for storage and later review.



Figure 13

4. Click on the **Close** button (Figure 12) to return to My Folders.

## Maintaining My Folders

1. Periodically delete old reports from My Folders to make it easier to find current copies.
2. If you run the same report twice, and do not use the Advanced Options to change the report name, the older version will be deleted and the latest version will be retained.

**Tip:** Click OK to ignore the “Deleting entries may result in broken links” message (Figure 14) that appears when deleting reports from My Folders.



Figure 14

## Finding Reports

This section will aid in locating “missing” reports in the Public Folders when you know the location and title. It will also help you search for a report when you know all or part of the name but not the location.

### Page 2 (Why isn’t this report listed?)

The Public Folders page displays 15 entries per page unless modified<sup>1</sup>. You must navigate to the next page to find more reports. Click on the VCR buttons in the upper right corner to advance or go back to the previous screen (See Figure 15). The VCR buttons will be grayed out if there is only one page.

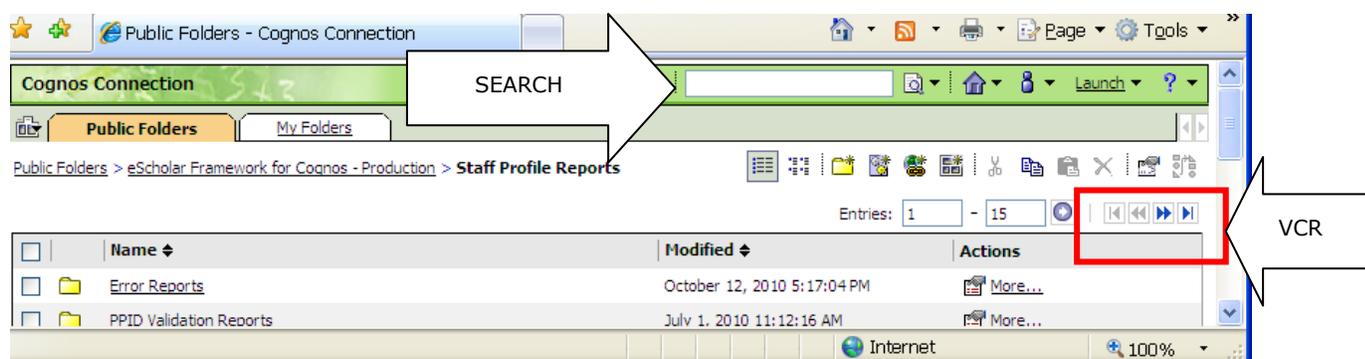


Figure 15

### Searching (What is that report called?)

Use the Search feature to quickly locate reports when standard navigation isn’t working. This is very helpful when you remember only part of a report name or when you can’t remember which sub-folder contains the report. To search:

1. Click in the search box (see Figure 15).
2. Type in all or part of the report name.
3. Press the Enter key.
4. View the results (see Figure 16). You may run the report from the results screen.

<sup>1</sup> The next section contains instructions for modifying this setting.

5. You may use the **Advanced** link to modify the search if your initial attempt is unsuccessful.

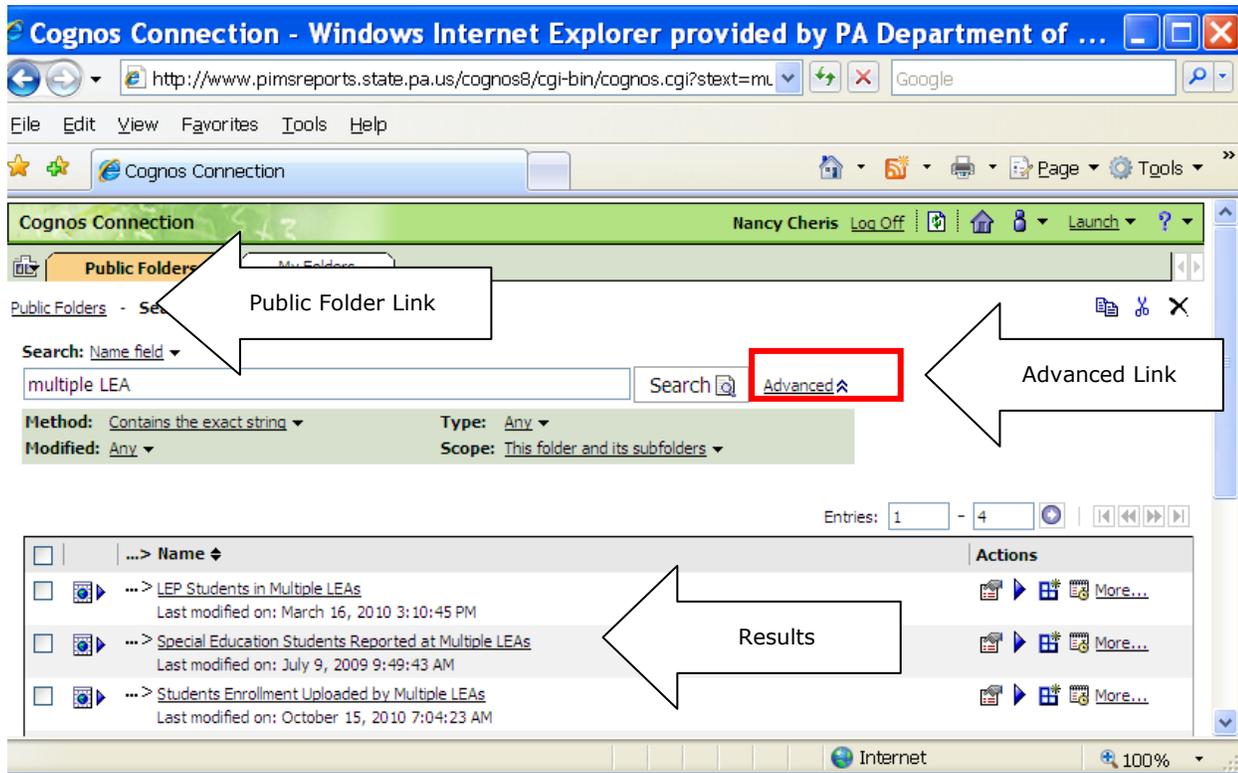


Figure 16

**Tip:** Run your search from the Public Folder or highest level within your collection to expedite searching. Click on the **Public Folder** link, or top level link, before initiating the search to quickly zoom to the target location.

## Additional Features

There are many enhancements built into Cognos® which may save time and provide status information. A few are introduced in this section. Feel free to explore the any feature not explained that you encounter while following the instructions.

### Home

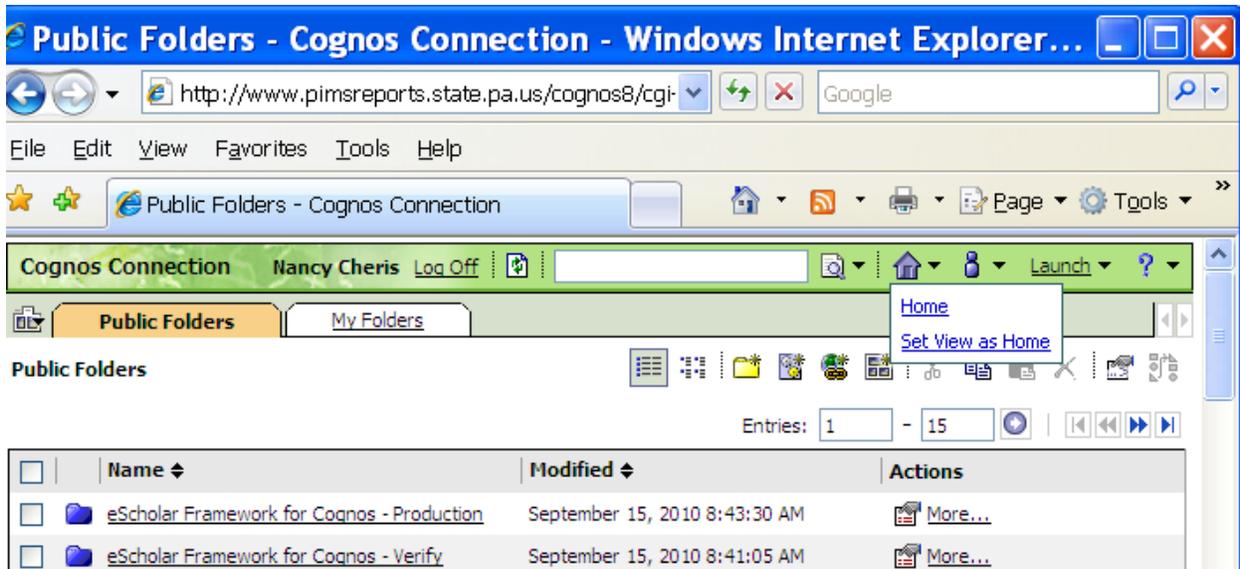


Figure 17

Click on the down arrow to the right of the **Home** icon to use this option.

- The **Home** link zooms you to whatever screen you previously set as your Home page. Use this when you have navigated elsewhere and wish to return.
- The **Set View as Home** menu option should be selected when you are at the location most frequently visited. Once set, you will automatically be directed to the Home location each time you initiate Cognos®.

**Tip:** Change your Home screen to match the current collection or phase of the collection in progress. For example, when you first upload, you may wish to navigate to Public Folders > Verify > Validation Reports > Template Verification and then set your Home location. When you begin finalizing your data, you may switch home to a Production location that contains the analysis reports related to the collection.

## My Area

The **My Area** icon provides information and additional customization options.

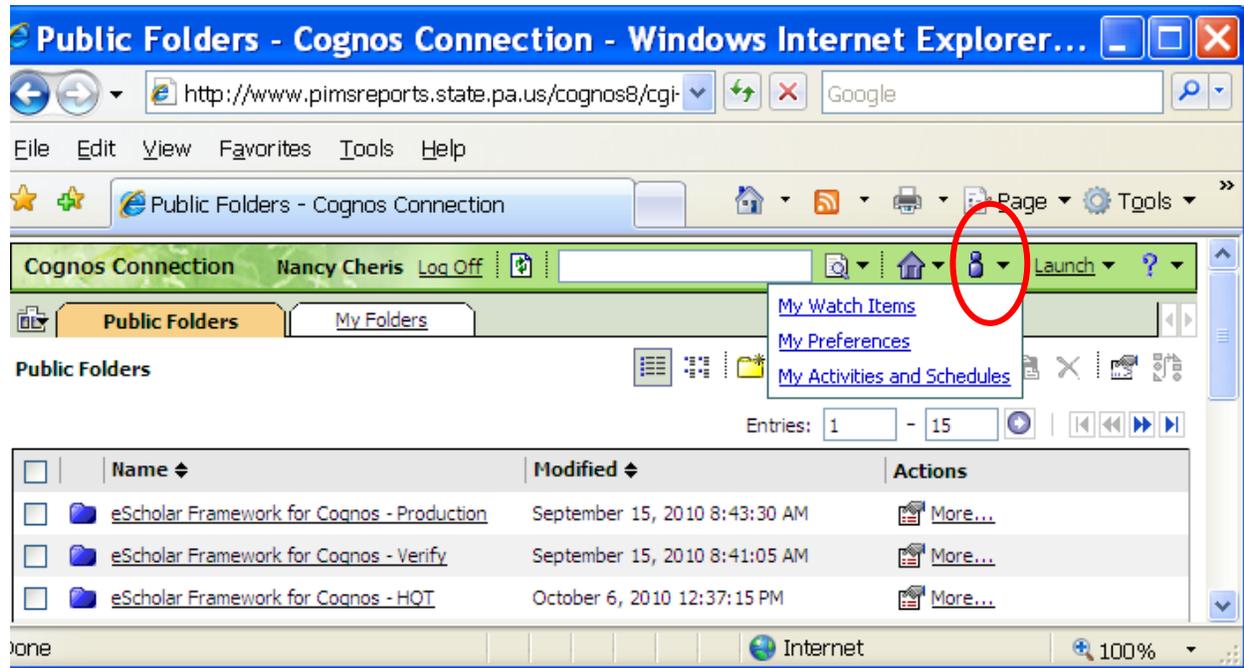


Figure 18

**My Preferences** (Figure 19) lets you customize the display, default report format, turn off the Welcome Screen (if you haven't already done so) and set other parameters.

- The **Number of entries in list view** changes the number of report names and sub-folders listed on each screen. If you are working in a collection with more than 15 reports, you may wish to increase the number as shown in Figure 19.
- Change the **Report format** to the Excel or Text delimited (CSV) format that you use most often. You have the option of changing the format each time you run a report, so you may select PDF when running the ACS, as needed. Changing the default from HTML saves a click each time you run the report and prevents accidentally running the report in the wrong format.

Click the **OK** button to save your changes and return to your prior location.

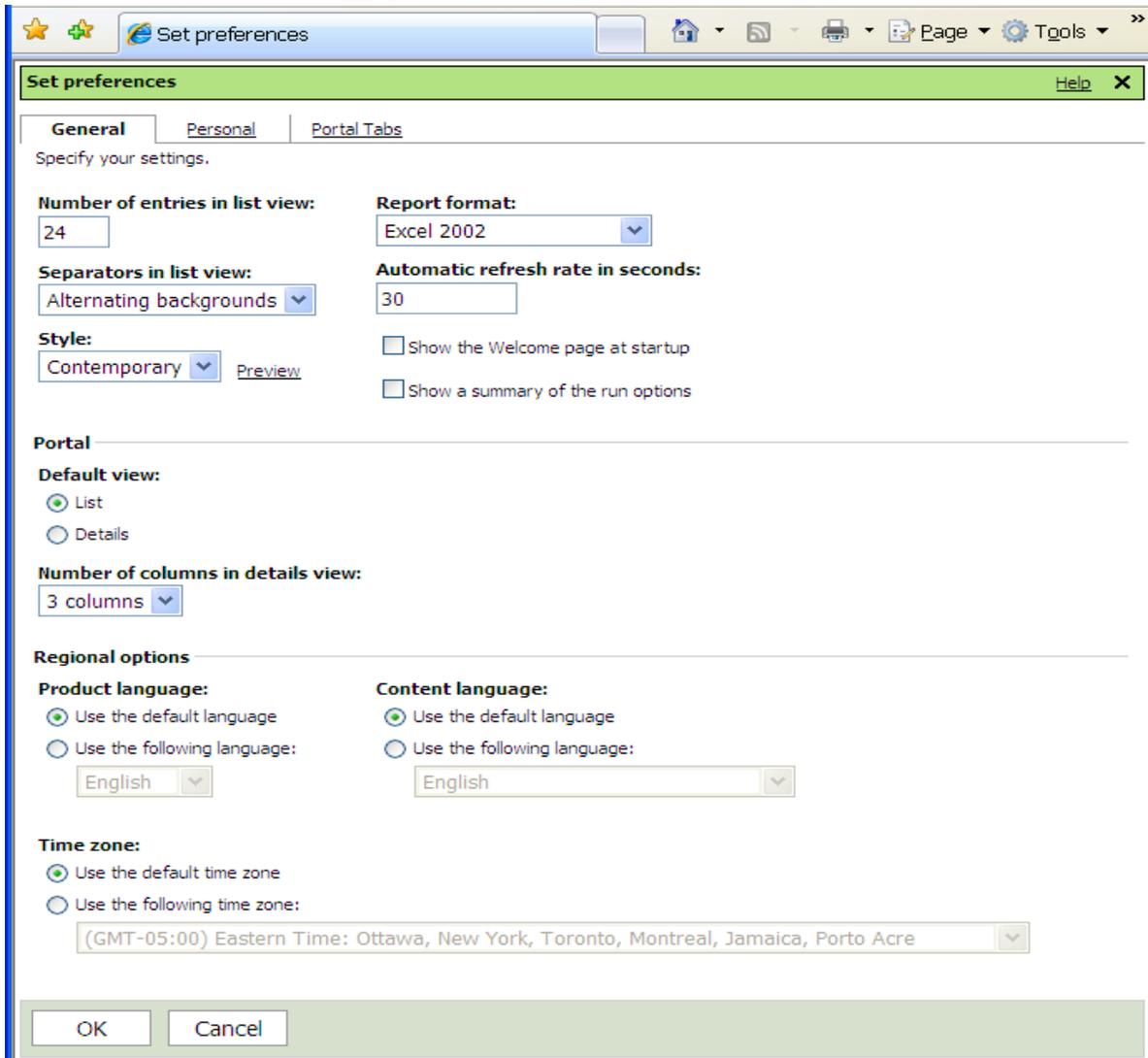


Figure 19

## My Activities and Schedules (Figure 20)

The My Activities and Schedules lets you track past, present and future activities. This feature works well when running reports using the advanced

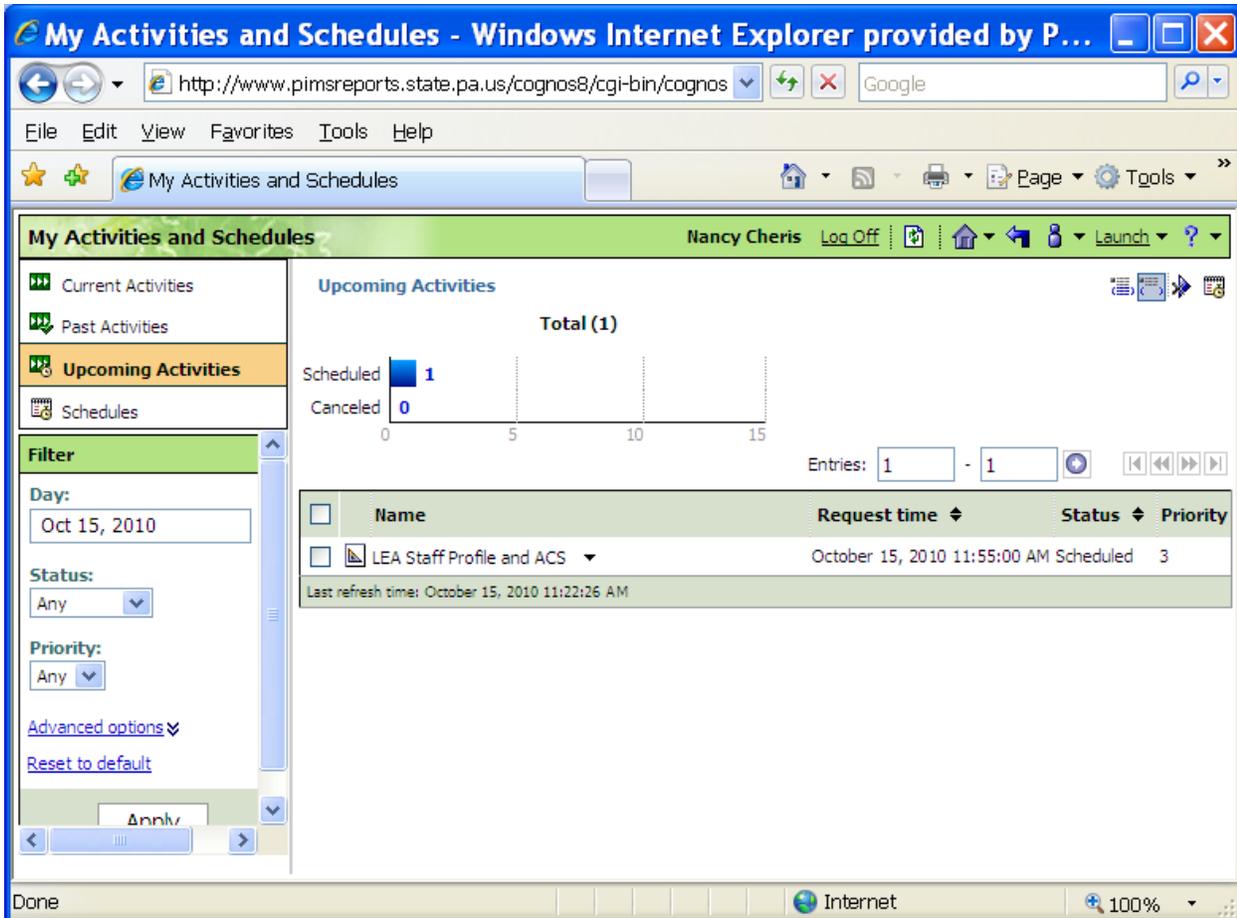


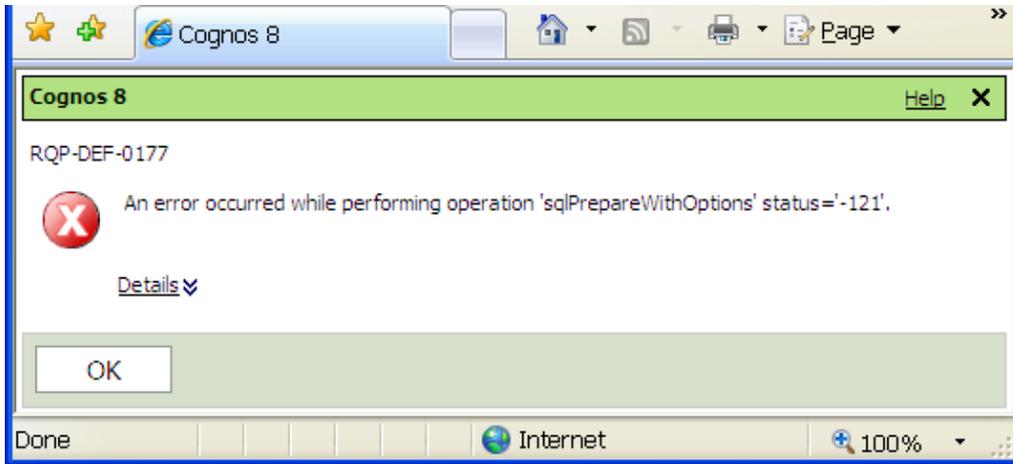
Figure 20

options. If a report seems to take too long, check the **Current Activities** feature. If it is executing, it is running. The **Upcoming Activities** link, shown in Figure 20, serves as a reminder for the reports already scheduled to run in the future or those you still need to initiate. The **Filter** is used to change the date range displayed in past or upcoming activities.

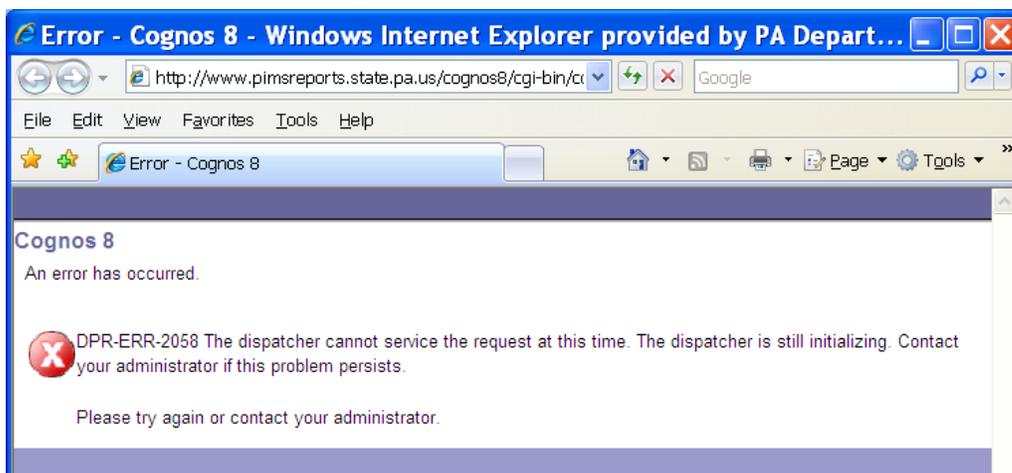
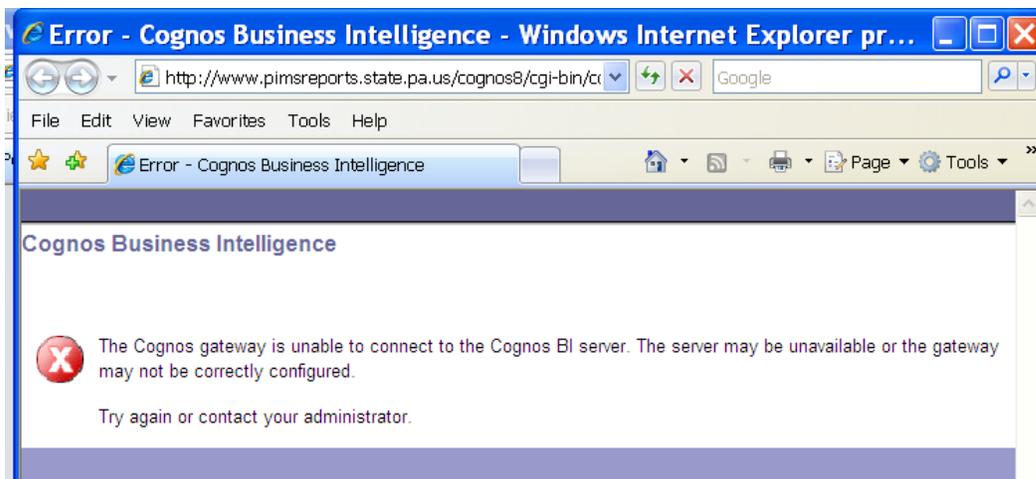
**Tip:** Use the **Return icon**  located beside the Home icon to exit from My Activities and Schedules.

## Common Error Screens

When Cognos® is not available, such as during the end of the refresh cycle, you are likely to see this error:



When you have timed out, these are typical error messages:



## PIMS Collection Reports

Collection specific information is distributed directly by the collection manager. Attend the training Webinar provided for each collection to ensure that you have the most current information available. The collections are:

<u>Collection</u>	<u>Cognos® Folder</u>
April 2011	Precode Reports
Child Accounting	Child Accounting Reports
Cohort Graduation Rate	Graduation and Dropout Reports
Course/HQT	Course Reports
Course/HQT	HQT Reports
Graduates & Dropouts	Graduation and Dropout Reports
November Precode	Precode Reports
Oct 1 Student	Enrollment Reports
Oct 1 Student	Low Income Reports
Safe Schools	Safe Schools Reports
Special Education	Special Education Reports
Staff (Professional Staff)	Staff Profile Reports
Summer CTE	CTE Reports

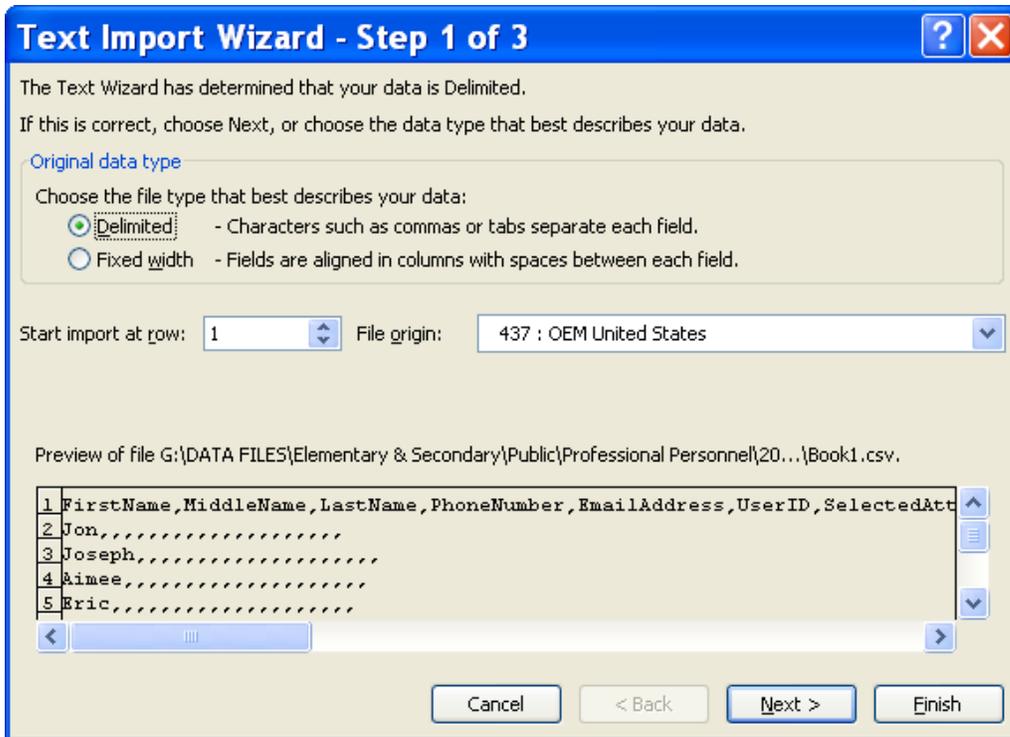
## Importing CSV Formatted Cognos® Reports into Excel®

Reports created applying the comma separated value (CSV) format may be imported into or linked with Microsoft Access®. To protect leading zeroes and ISO formatted dates, we recommend changing all fields to text if imported.

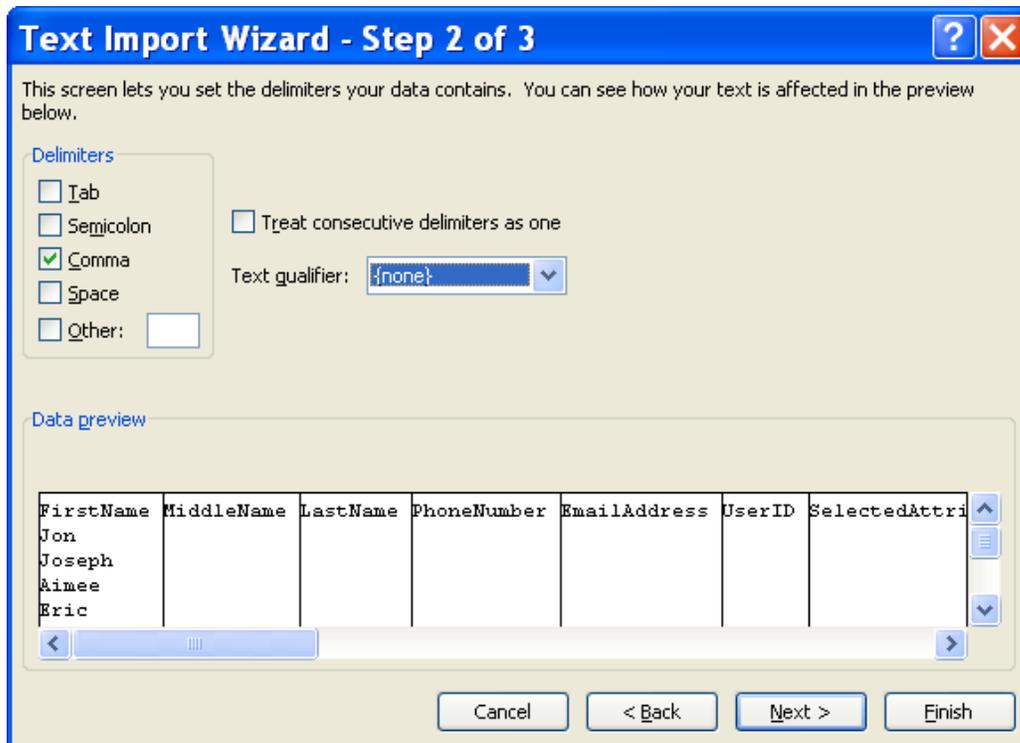
CSV files may be opened directly in Excel, however, leading zeroes may be lost and ISO formatted dates will convert to non-ISO format. We recommend that you import CSV files and change all fields to text fields to avoid these problems. Instructions follow to help you use the Import Text File Wizard.

To begin the import process, open Excel and begin with a blank worksheet.

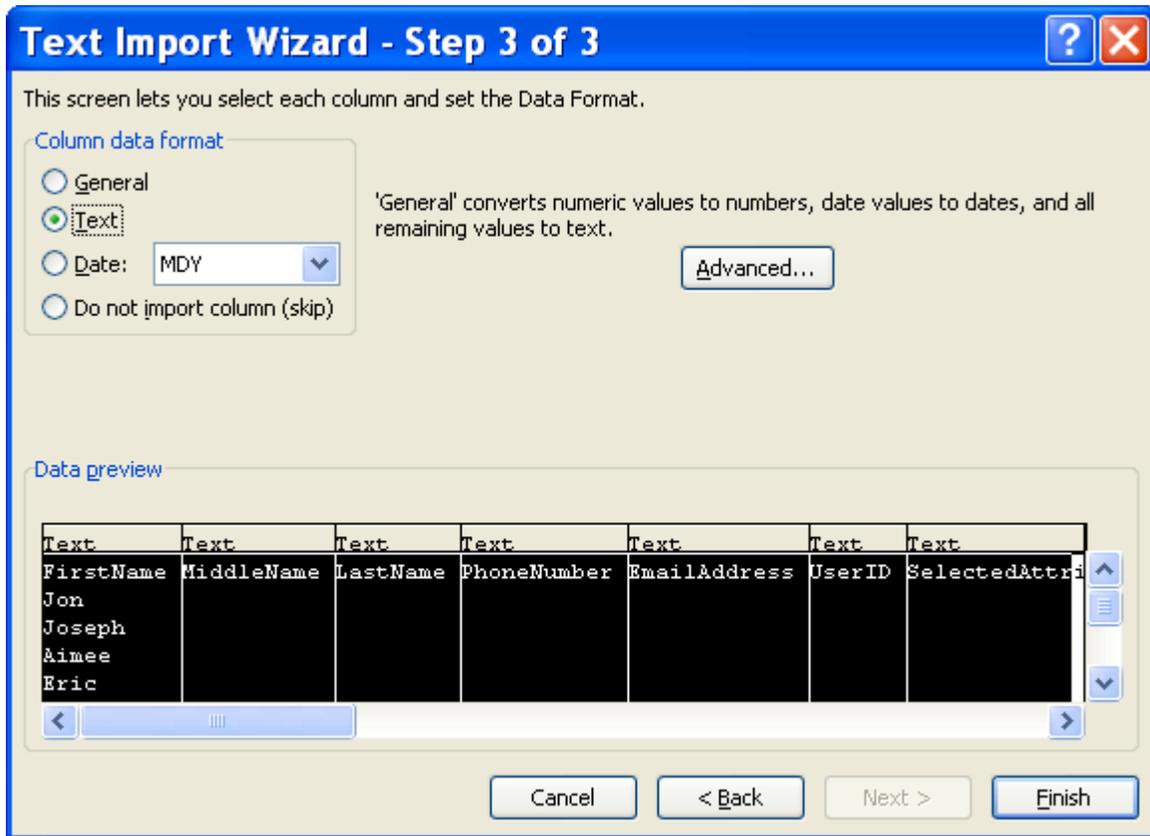
1. Launch the Import Text File wizard:
  - EXCEL 2002/2003 – Click on the Data > Import External Data > Import Data menu options.
  - EXCEL 2007/2010 – Click on the DATA ribbon > Get External Data - From Text



2. Click on the **NEXT** button on Step 1 of 3



3. Change the Delimiters from Tab to **COMMA** and the Text qualifier to **{none}** in Step 2 of 3, and then click on the **NEXT** button.



4. Change all **Column data formats** to text:
  - Click anywhere in the first column (on Jon or Joseph in the picture above);
  - Hold down the **Shift** key and slide the blue bar beneath the Data Preview section all the way to the right until you can see the last column;
  - Before letting go of the shift key, click anywhere in the last column. All columns should be blackened as shown above.
  - Click on the **Text** radio button. All columns in the data preview section will now display "Text" instead of "General".
5. Click on the **Finish** button.
6. In Excel 2007/2010 click on **OK** to respond to the Import Data options.

