

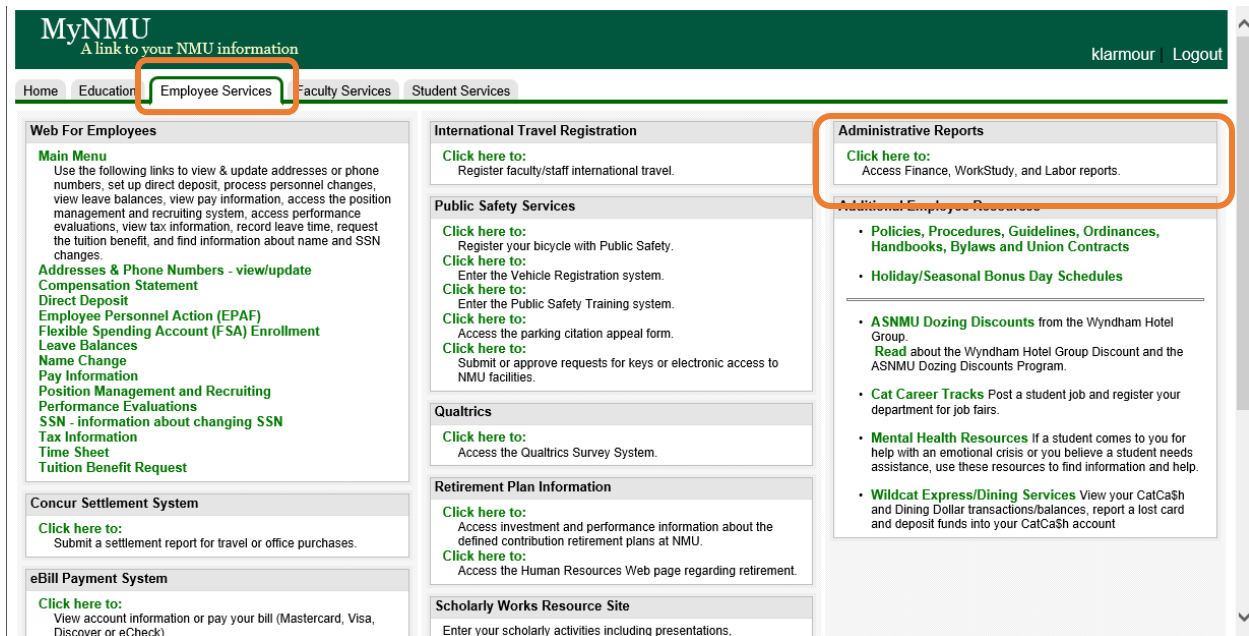


IBM Cognos Analytics is the reporting tool that NMU uses to access information across many datasets. This includes student, faculty/staff, financial, and course information.

## HOW TO ACCESS COGNOS

Cognos is an online service accessed through a web browser. We recommend using Chrome or Firefox. It will **not** work in Internet Explorer.

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/>. Under the “Employee Services” tab, you will find a header in the far left column for “Administrative Reports.”



When you click the link, a new tab will open asking you to login with your username and password. Please use the credentials assigned to you through email. If you are accessing Cognos for the first time, you will be asked to change your password.

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 OK button.

## CHANGING YOUR PASSWORD

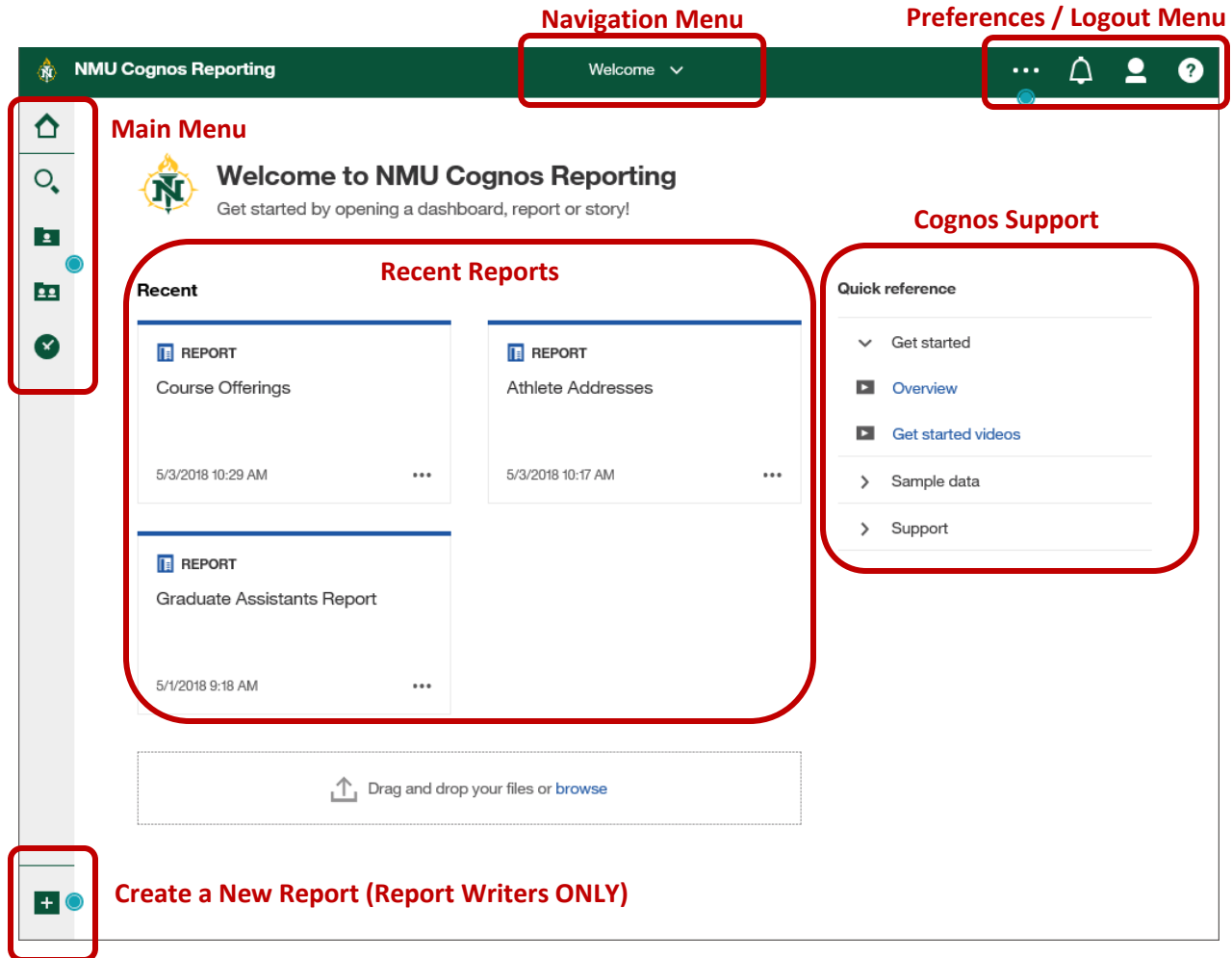
When you login to Cognos for the first time you will be prompted to change your password. Type your old password (the one given to you by email) into the “Old password” field. Then choose a new password for the second field, and confirm it in the third field. Click the “Change password” button.



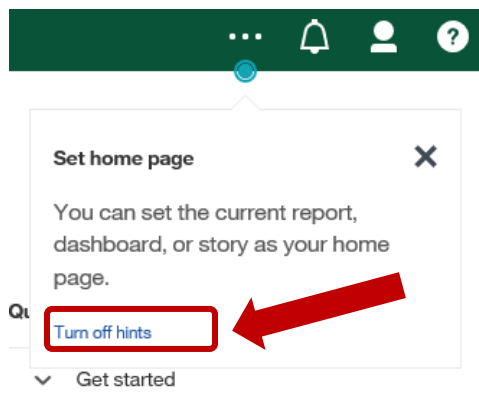
If you forget your password and need it reset, please contact Business Intelligence/Information Services. Again, this password is **ONLY** for Cognos Reporting and does not affect your NMU or Banner password.

# DASHBOARD

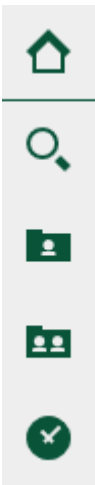
The welcome screen is a dashboard that allows you to access your data and is laid out as follows:



The first time you login to the system, you will see teal dots. If you click on the dot, you will see some helpful hints for navigating in Cognos. You may turn off hints at any time.



The **Main Menu** is in the upper left-hand side of the screen and is a collection of vertical icons.



**Home:** This will return you to the Welcome screen, or whichever screen you have set up as your home screen.

**Search:** Click here to search for reports.

**My content:** Formally “My Folders.” If you are a **report writer**, this is where you can store your reports for personal use (not available to other users).

**Team content:** Formally “Public Folders.” This is where you will find your department and administrative reporting (finance) folders.

**Recent:** This is where you will find a list of reports you recently ran.

The **Preferences / Logout Menu** is located in the top right corner of the screen.



The **Ellipses icon (Action Button)** will allow you to set any screen as your home screen.



The **Bell icon** shows any notifications you may have.

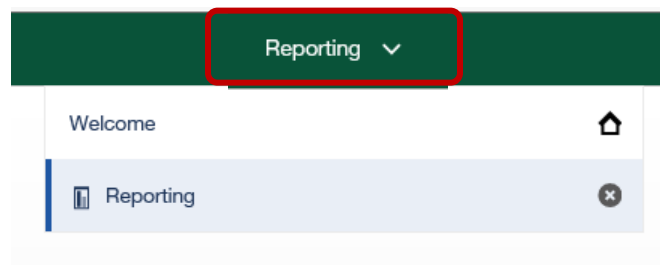


The **Person icon** is where you can set your preferences, schedule report runs, and logout.




The **Question Mark icon** will take you to IBM Cognos help resources. However, if you need help, please reach out to NMU Business Intelligence first.

The **Navigation Menu**, which can be thought of like the “breadcrumbs” feature from the previous version of Cognos, tells you what screen you are currently viewing. If you ever get lost, simply click on the title with a down arrow at the top center of the page, and you can find your way back to the welcome screen.



At the center of the **Welcome** screen, you will see a listing of recent reports you ran, which gives you easy access to quickly run them again. On the right-hand side, you will also see the “Quick reference” menu which will take you to YouTube videos and IBM Cognos support. These may be of interest to report writers. However, if you need help with Cognos, **please reach out to NMU Business Intelligence first.**

The bottom left corner of the screen has a  icon. This button is for people who write reports in NMU Cognos Reporting. If you only have permission to **RUN** reports, clicking this icon will give you an error or a blank screen. Simply click on the **Navigation Menu** in the top center and you can go back to previous screens.

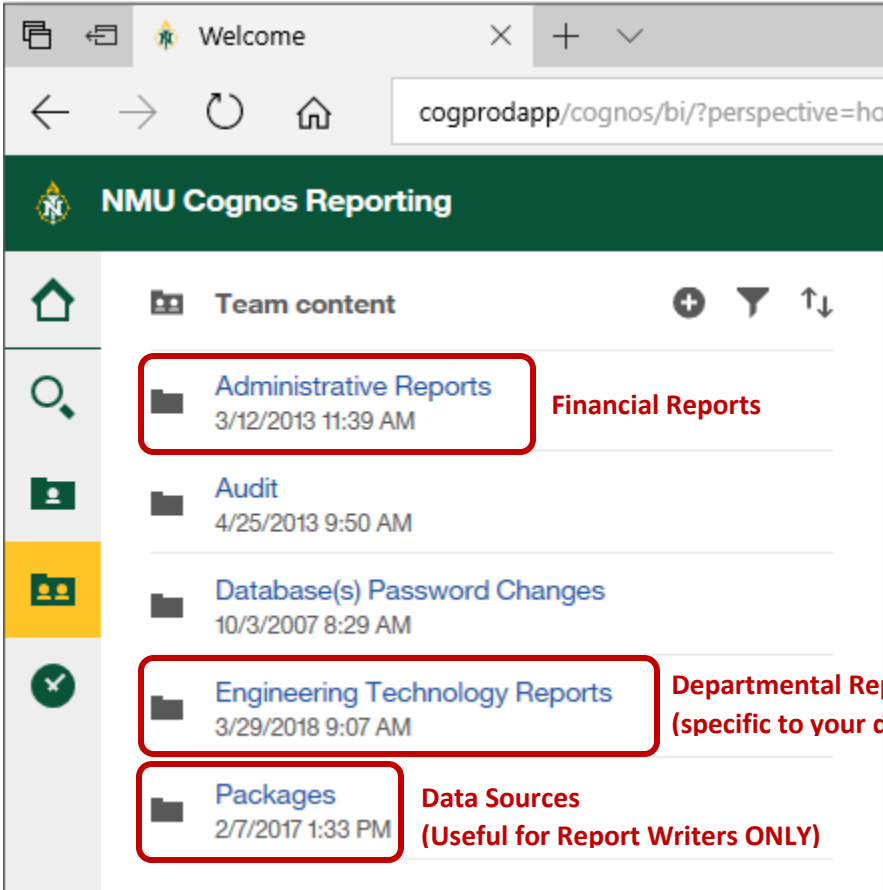
If you are a report writer, clicking the **Plus** icon will give you the option to create new content, such as reports, dashboards, and stories. Report writing will be covered in separate documentation.

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## TEAM CONTENT

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The **Team content** button on the main menu is where you will find all the folders and reports you have access to. This is the fourth icon on the main menu and looks like a folder with two people icons.



The screenshot shows the NMU Cognos Reporting application interface. The browser address bar displays `cogprodapp/cognos/bi/?perspective=ho`. The main header is green with the NMU logo and the text "NMU Cognos Reporting". Below the header is a navigation menu with several icons. A red arrow labeled "Team Content" points to the icon representing a folder with two people, which is highlighted in yellow. To the right of this icon, a list of reports is displayed under the heading "Team content". The reports are:

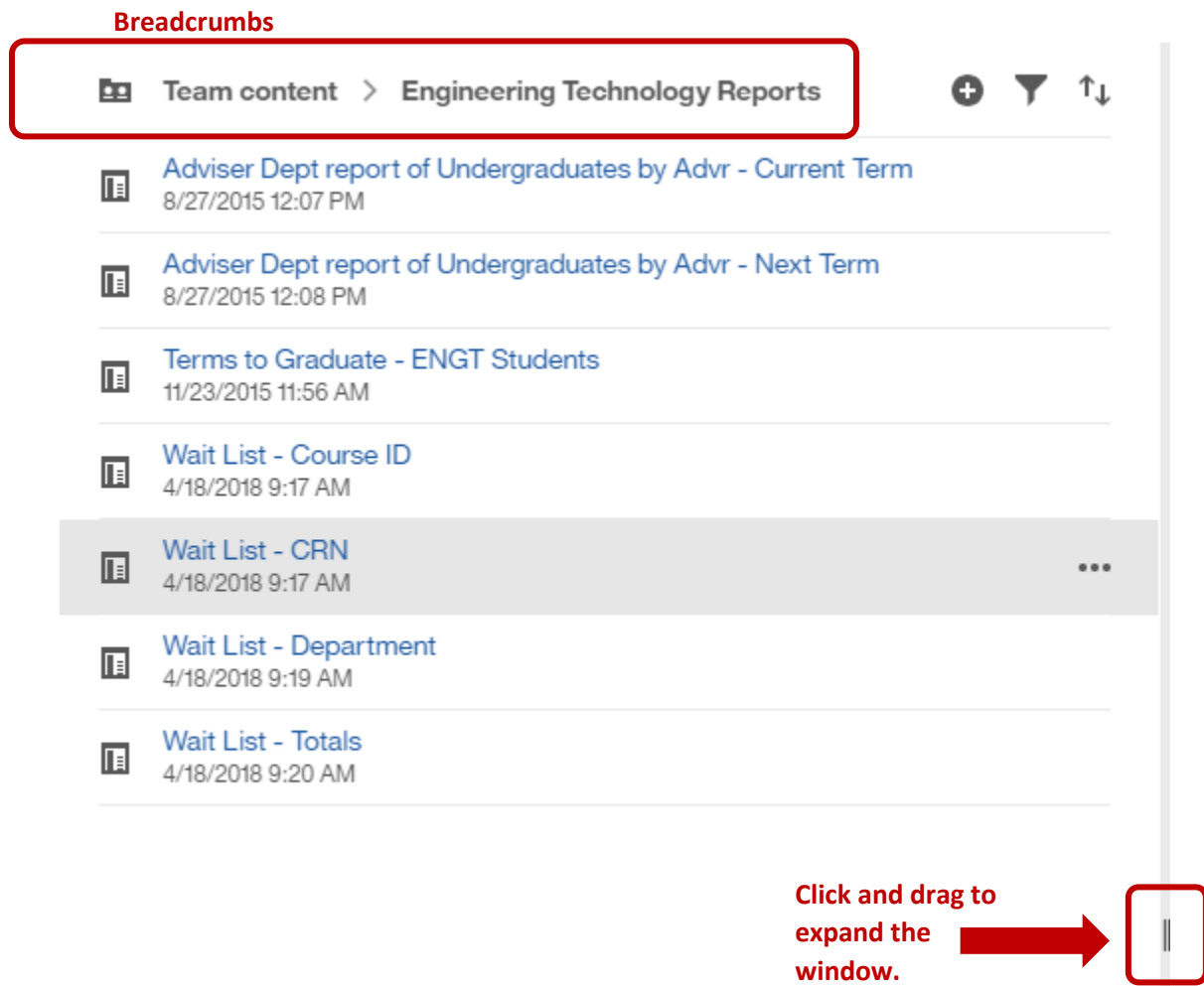
- Administrative Reports** (3/12/2013 11:39 AM) - circled in red, with "Financial Reports" written to its right.
- Audit** (4/25/2013 9:50 AM)
- Database(s) Password Changes** (10/3/2007 8:29 AM)
- Engineering Technology Reports** (3/29/2018 9:07 AM) - circled in red, with "Departmental Reports (specific to your department)" written to its right.
- Packages** (2/7/2017 1:33 PM) - circled in red, with "Data Sources (Useful for Report Writers ONLY)" written to its right.

Some folders are organized into subfolders. If you would like to rearrange reports in a folder, rename a folder, or add a folder, please contact Business Intelligence/Information Services. We want you to be as organized as possible and we want your folder to make sense to you and your department!

If you get lost in your folders, the Team content window also provides breadcrumbs to figure out where you are. This is also helpful if you request a report and are trying to tell someone where to save it, or if a report needs tweaking and you have to describe how to find it.

If your window is too small to read the title of a report, click and drag the || icon to expand the window (this feature works best in Chrome).

**Breadcrumbs**



Team content > Engineering Technology Reports

- Adviser Dept report of Undergraduates by Advr - Current Term  
8/27/2015 12:07 PM
- Adviser Dept report of Undergraduates by Advr - Next Term  
8/27/2015 12:08 PM
- Terms to Graduate - ENGT Students  
11/23/2015 11:56 AM
- Wait List - Course ID  
4/18/2018 9:17 AM
- Wait List - CRN  
4/18/2018 9:17 AM
- Wait List - Department  
4/18/2018 9:19 AM
- Wait List - Totals  
4/18/2018 9:20 AM

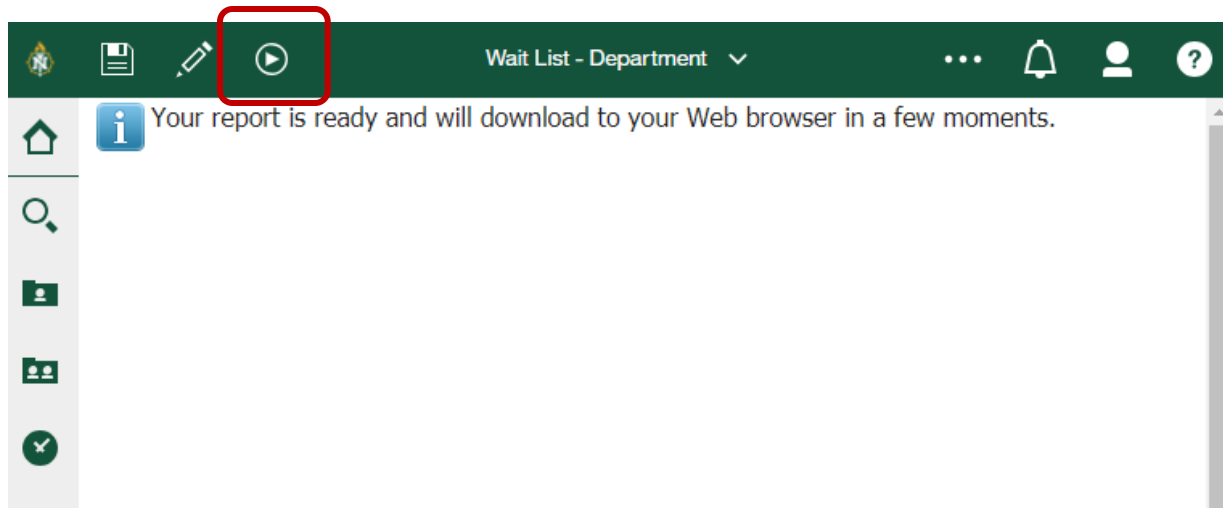
Click and drag to expand the window.


## RUNNING A REPORT








To run a report, simply click the title of the report. This will run the report in its default format. Some reports will take you to a prompt page where you may need to input information, such as a term for semester reports, or an organization number for finance reports. Other reports may load without prompting.

Please note that the more information in a report, the longer it takes to run. If it seems like your report is running forever, contact Business Intelligence/Information Services. As we go through server upgrades, sometimes the links to the data get broken and require different programming.

When the report has ran successfully, you will see this message:



If you want your report in a different format, you can click the triangle **Run** button. 

- |   |  |
|---|--|
|  Run HTML              | Run as a webpage.  |
|  Run PDF               | Run as an Adobe PDF (generally printer-friendly).        |
|  Run Excel             | Run as an Excel document.                                |
|  Run Excel data        | Run as data (may not maintain style of original report). |
|  Run CSV               | Run as comma delimited data (usable in text editor).     |
|  Run XML               | Run as eXtensible Markup Language, similar to HTML.      |
|  Reset prompts and run | Run again in the same format with different prompts.     |

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 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),
- Or anything else!

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## REQUESTING A REPORT

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When requesting a report, you will want to reach out to one of the two data analysts in the Business Intelligence/Information Services department.

### **Kelly Larmour (x1914)**

[klarmour@nmu.edu](mailto:klarmour@nmu.edu)

Specializes in:

- Student and Human Resources data
- Detailed reporting
- Cognos access and password changes

### **Jenna Morgan (x1254)**

[gmorgan@nmu.edu](mailto:gmorgan@nmu.edu)

Specializes in:

- Admissions, Finance, Purchasing, and Financial Aid data
- Group 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 probation.
  - **Note:** If you are requesting data from outside of your department or non-directory information (like GPA or IN), we may require you to state the business purpose of your report in an email to Kim Rotundo in the Registrar's Office ([krotundo@nmu.edu](mailto:krotundo@nmu.edu)) for her to approve.



- **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 specifically 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.

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## TROUBLESHOOTING

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If you are having issues accessing Cognos, receiving server errors when you run reports, or need help with anything else, please contact us.

### **Business Intelligence & Information Services**

(906) 227-2410

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Open during university business hours.