

# CREATE A REPORT VIEW IN COGNOS

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## REVISION HISTORY

Version	Date	Name	Description
1.0	1/6/2017	Keith Harnden	Draft
1.1	1/9/2017	Teri Eckman	Final
2.0	1/13/2017	Teri Eckman	Added clarification on file format type and default section

## INTRODUCTION AND PURPOSE

This document will take you through the steps to create a Report View in Cognos. A Report View allows you to set parameters for a report and run it as needed with the saved parameter set. This is very similar to the “Save Query” functionality in the Student Data Query System.

## RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. N/A

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. All Banner Cognos users

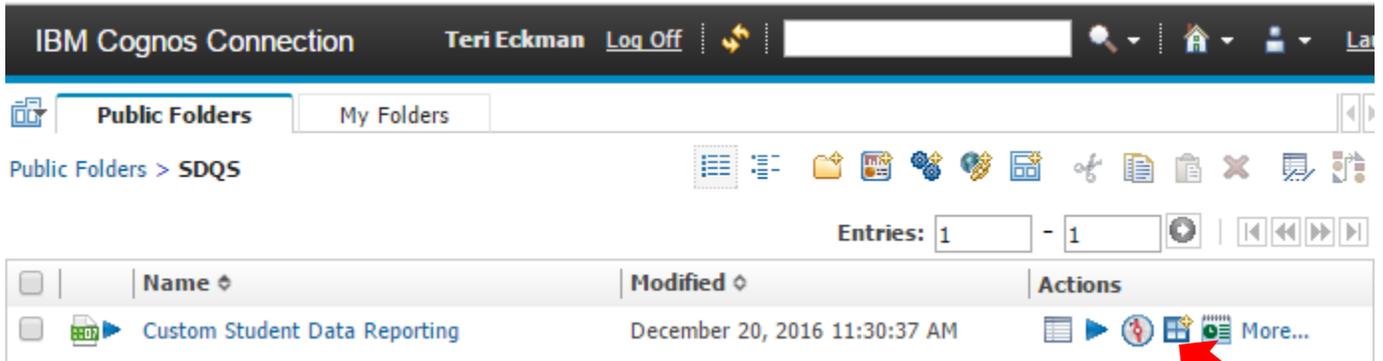
## BEFORE YOU BEGIN

Log into Banner Cognos to follow along.

## PROCEDURES

### STEPS

1. Click on the report view icon  next to the report you want to set up



2. Change the report name to something meaningful for the future, for example “Biology Majors”
3. Click on “Select My Folders”
4. Click “Finish”

#### Specify a name and description - New Report View wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:

Biology Majors for Winter 2017

Description:

Screen tip:

Location:

None

Select another location... **Select My Folders**

Cancel

< Back

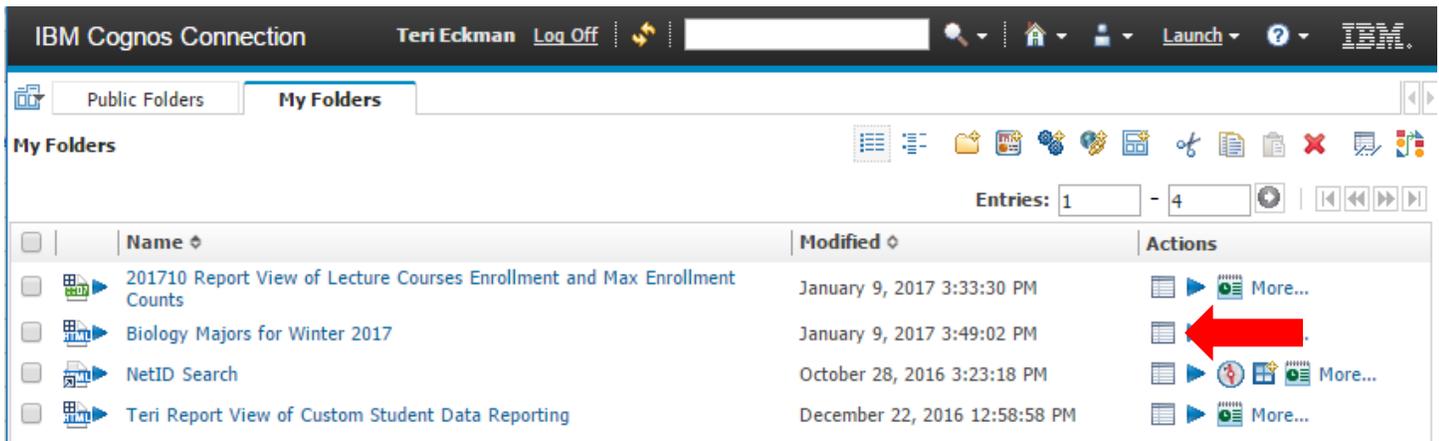
Next >

Finish

5. You will be returned to the **Public Folder**. Navigate to your **My Folders** tab.



6. Click on the properties icon  next to the report that you just named.



7. Click on the “Report view” tab

Set properties - Biology Majors for Winter 2017
Help

General
Report view
Permissions

Specify the properties for this entry.

**Type:** Report view

**Owner:** Teri Eckman

**Contact:** None [Set the contact](#) ▼

Disable this entry

Hide this entry

**Location:** My Folders [View the search path, ID and URL](#)

**Created:** January 9, 2017 3:49:02 PM

**Modified:** January 9, 2017 3:49:02 PM

**Icon:** Standard [Edit...](#)

---

The name, screen tip and description are shown for the selected language.

**Language:**  
 [Remove values for this language](#)

**Name:**

**Screen tip:**

**Description:**

---

**Run history:**  
 Setting the number of occurrences to zero (0) saves an unlimited number of occurrences.

Number of occurrences:

Duration:   ▼

**Report output versions:**  
 Setting the number of occurrences to zero (0) saves an unlimited number of occurrences.

Number of occurrences:

Duration:   ▼

---

Source report : [Public Folders > SDQS > Custom Student Data Reporting](#) [Report Properties](#) [Link to a report...](#)

OK
Cancel

**Note:** Repeat steps 6 and 7 to edit an existing Report View.

8. Set the following options
  - a. **Default action:** “View most recent report”
  - b. **Report options:** if you want to override defaults, then click the checkbox and set default values (listed below)
    1. **Formats** (HTML, Excel, PDF, etc.) **Note:** do not select “Excel 2007 Data” as the Format. This will cause the output to include columns that you did not select. Selecting “Excel 2007” will give you only the columns you select.
    2. **Accessibility** (enable or not)
    3. **Languages** (select English or leave as-is)
  - c. **Prompt values:**
    - i. Click the “Set...” link
      1. Another window will open that will allow you to set the parameters you want to save.
        - a. You are NOT running the report at this point – you are saving your selections so that you can run the report.
        - b. Click “**Finish**” or in the Custom Student Data Reporting click “**Execute Query**”

Set properties - Biology Majors for Winter 2017

General
Report view
Permissions

Select the default options to use for this entry.

**Default action:**

**Report options:**

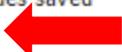
Override the default values 

**Format:**

**Accessibility:**  
 Enable accessibility support

**Language:**

**PDF options:**  
 No options saved  
[Set...](#)

**Prompt values:**  
 No values saved  
[Set...](#) 

Prompt for values

[Advanced options](#) ▾

CUSTOM STUDENT DATA REPORTING (CSDR) PROMPT VALUES SET

Criteria			Cancel	Execute Query
<b>Detail/Summary View</b> <input checked="" type="radio"/> Detail View <input type="radio"/> Summary View		<b>Term/Student</b> Term: 201710 SID Nbr: Last Name: First Name: Net ID:		<b>Demographic</b> <input type="radio"/> Gender <input type="radio"/> Ethnicity <input type="radio"/> Visa Type <input type="radio"/> Country of Citizenship
<b>Academic Classification</b> <input type="radio"/> College <input type="radio"/> Degree <input checked="" type="radio"/> Major <input type="radio"/> Concentration <input type="radio"/> Minor <input type="radio"/> Class <input type="radio"/> Department		<b>Academic Matriculation</b> <input type="radio"/> Entry Term <input type="radio"/> Entry Action <input type="radio"/> Exit Term <input type="radio"/> Career <input type="radio"/> Current Entry Action <input type="radio"/> Expected Grad Term <input type="radio"/> Degree Checkout Term <input type="radio"/> Degree Checkout Status <input type="radio"/> Term Catalog		<b>Academic Classification - Major</b> <input type="checkbox"/> BIEN - Bioengineering <input checked="" type="checkbox"/> BIOL - Biology <input type="checkbox"/> BLCN - Conservation Biology <input type="checkbox"/> BLPL - Paleobiology <input type="checkbox"/> BLPS - Psychobiology <input type="checkbox"/> BLSC - Biological Sciences <input type="checkbox"/> BLST - Black Studies
<b>Original Cohort Classification</b> <input type="radio"/> Academic Year <input type="radio"/> Entry Term <input type="radio"/> Career <input type="radio"/> College <input type="radio"/> Degree <input type="radio"/> Major <input type="radio"/> Concentration <input type="radio"/> Minor		<b>Enrollment</b> <input type="radio"/> Subject Area <input type="radio"/> Session <input type="radio"/> Activity <input type="radio"/> Grade Type <input type="radio"/> Status <input type="radio"/> Official Grade <input type="radio"/> Primary Class <input type="radio"/> Course Type Course ID: Course ID Course Section: Course Secti Earned Units: Earned Units		
<b>Admission Application</b> <input type="radio"/> Application Term <input type="radio"/> Application Status <input type="radio"/> Application Requirement Rule <input type="radio"/> Preferred College Applied To <input type="radio"/> Preferred Degree Applied To <input type="radio"/> Preferred Major Applied To		<b>Academic Statistics</b> Current Term: Current Terr GPA: Cum. Undergrad. GPA: Cum. Undergr Cum. Grad. GPA: Cum. Grad. i Cum. Prof. GPA: Cum. Prof. G Current Enrolled Units: Current Enro		

Note: CSDR has 5 pages in the drop down for parameter selections and display columns. Make sure you are on the page you want your saved Report View to default to before you click on "Execute Query". Whichever page you are on when you click "Execute Query" will be the one that you are presented with when you run your saved Report View.

You will be returned to the **Report view** tab after clicking “Finish” or “Execute Query”

- ii. **NOTE: Checkbox Prompt for values:** (if you do **not** want to see the prompts each time you click on your saved Report view then **uncheck** this box)
  1. For example, if you selected Winter 2017 Biology majors and never want to run it for Spring 2017 Biology majors, then uncheck the box.
  2. If you want to run this same selection but modify other criteria at the time you execute the query, then keep the box checked. When you click on your Report you will get the prompts so you can choose the additional criteria before running the query.

Set properties - Biology Majors for Winter 2017

General
Report view
Permissions

Select the default options to use for this entry.

**Default action:**

**Report options:**  
 Override the default values  
**Format:**  
  
**Accessibility:**  
 Enable accessibility support  
**Language:**

**PDF options:**  
 No options saved  
[Set...](#)

**Prompt values:**  
 AcademicClassificaitonColumnsParm: '(no ef... [View all](#)  
[Edit...](#) [Clear](#)  
 Prompt for values

[Advanced options](#) ⌵

- d. Click “OK”

You will be returned back to your “**My Folders**” tab. Click on the name of the report you created to view your results OR enter additional prompts to run the query.

**SPECIAL CONSIDERATIONS:**

Graduate students are no longer in the “GD” college, but are in their respective college. Be sure to include or select on “Career” to identify Graduate students.