

PLANSOURCE[®]

Cognos Analytics Portal

Business Intelligence

Cognos Analytics

Cognos Analytics is a complete web-based Business Intelligence and analytics solution, offering a unified user experience that works the same on all devices.

Consumers can view reports to analyze their PlanSource HCM data, while report authors can edit reports without needing a separate authoring environment.

What's New in Cognos Analytics

Many features from Business Intelligence (v10) have changed or been replaced in Cognos Analytics (v11).

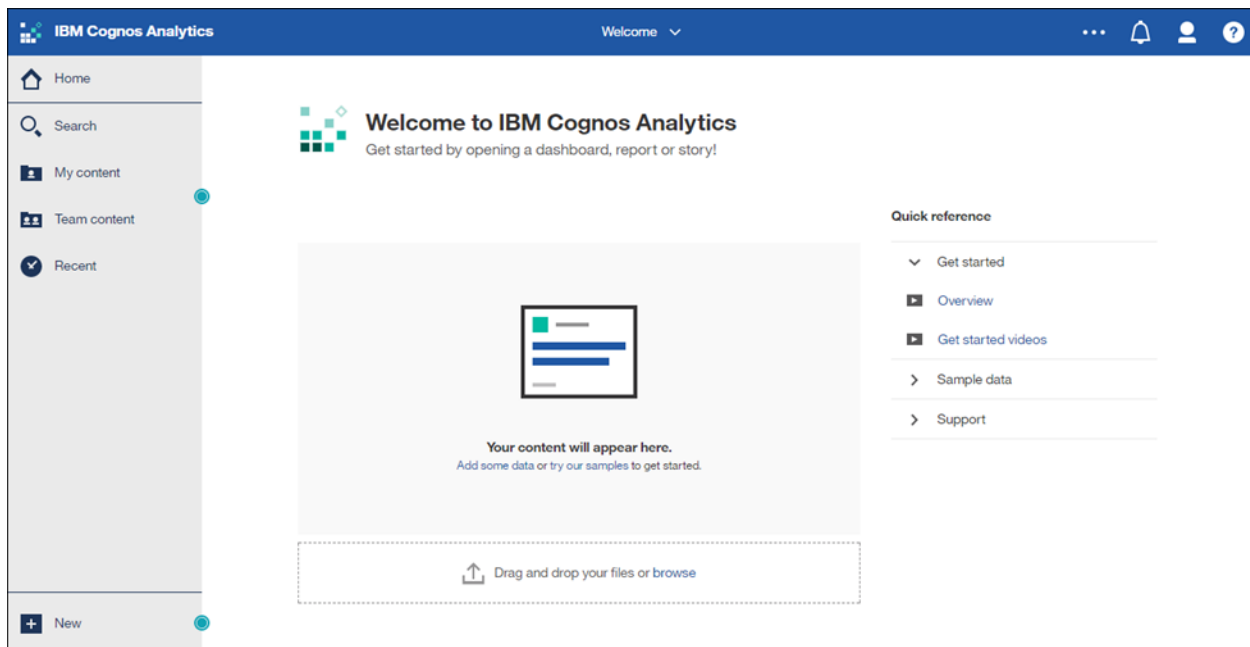
- Cognos Analytics Portal replaces Cognos Connection.
- Multiple studios have been combined into a single report authoring tool that supports all report users: consumers, self-service report authors, and professional report authors.
- On-demand toolbars and menus display options that are valid for the current context.

Event Studio remains available as a separate tool.

Cognos Analytics Portal User Interface

The Cognos Analytics portal enables users to view and organize their Business Intelligence content.

After logging in to Cognos Analytics, the Welcome page appears. From the Welcome page, you can navigate to the content you need.



In the Cognos Analytics portal you can:

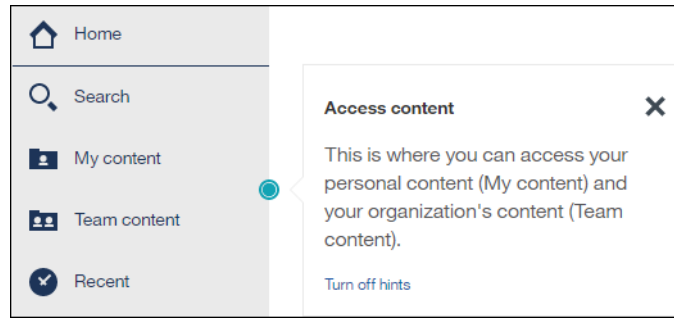
- Run a report with specific options including format, prompt values, and language.
- Interact with report output in the report viewer by filtering, sorting, and grouping.
- Create a report view or a copy of a report for future use.
- Subscribe to (schedule) a report to run at a convenient time or on a recurring basis.
- Create dashboards with visualizations.

You must have the necessary permissions to access content and perform tasks such as authoring or saving entries. Your Business Intelligence administrator assigns permissions.

Menu Hints

Cognos Analytics provides hints opposite the name of selected menu items.

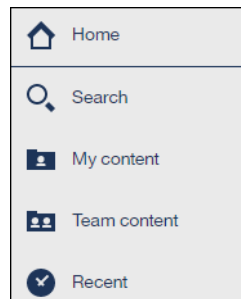
Select the green dot adjacent to a menu item to learn more about the item.



Select Turn Off Hints to remove the menu hints. You can turn hints on again in My Preferences.

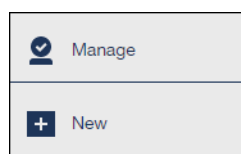
Side Panel

The Cognos Analytics side panel enables you to access your Business Intelligence content.



- Home - Home returns you to your starting page from any location.
- Search - The Search function helps you locate reports, dashboards, packages, and other items stored in My Content and Team Content. You can save search parameters for future use.
- My Content - My Content displays your personal content. (My Content replaces My Folders in Cognos 10.)
- Team Content - Team Content displays public content that is available to your team. (Team Content replaces Public Folders in Cognos 10.)
- Recent - Recent lists the last twenty items you accessed. Recently accessed items also appear in panes on the Welcome page.

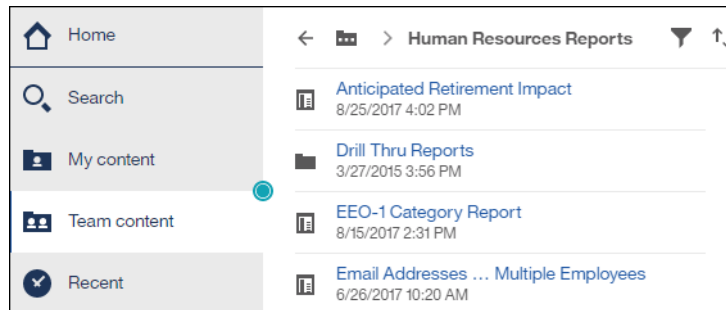
The bottom area of the side panel provides access to content creation and administration.



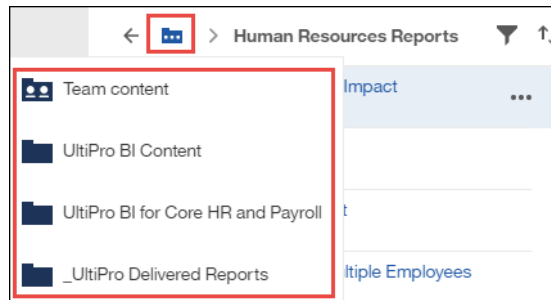
- **Manage** - Manage provides access to administration features. Only users assigned to an administrator role see Manage.
- **New** - The New icon allows you to create objects including dashboards and reports. Only users assigned to specific roles are able to create reports. All users are permitted to create dashboards.

Navigation

Selecting a menu item from the side panel allows you to navigate to your Business Intelligence content. Every selection expands a tree structure.



To view the navigation path, select the Collapsed Items icon.



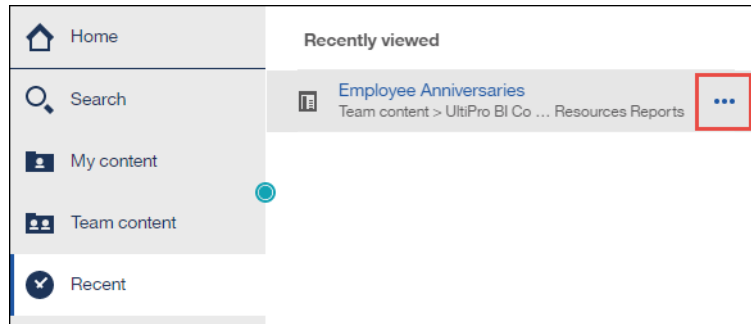
To navigate back one level you can select the left-facing arrow.

You also have the option to filter results and sort.

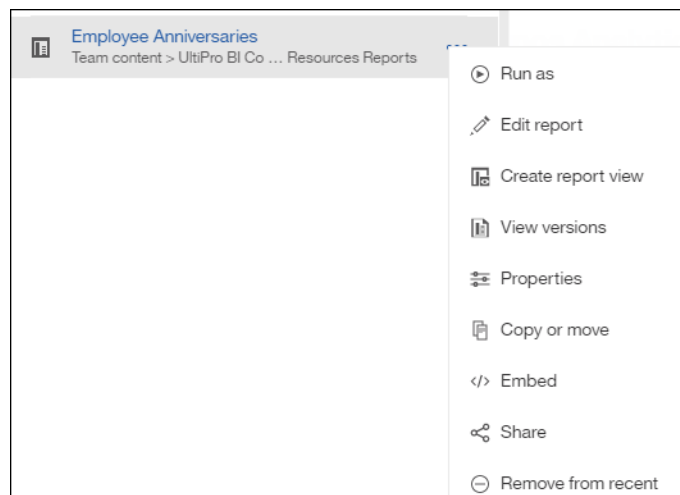
On-Demand Menus

On-demand menus display options that are valid for the current context.

Select the More icon opposite an object name to view the options valid for the object.



Make a selection from the drop-down list as needed.

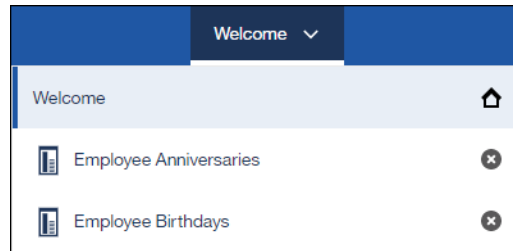


Application Bar

The application bar at the top of the portal provides access to your Personal Menu and notifications, and enables you to navigate between content pages and establish a home page.

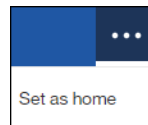


The Welcome drop-down list enables you to navigate between open reports and the Welcome page.

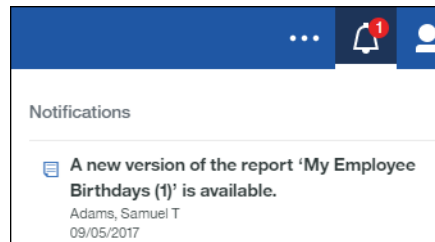


To close an open report, select the Remove icon (x) to the right of a report name.

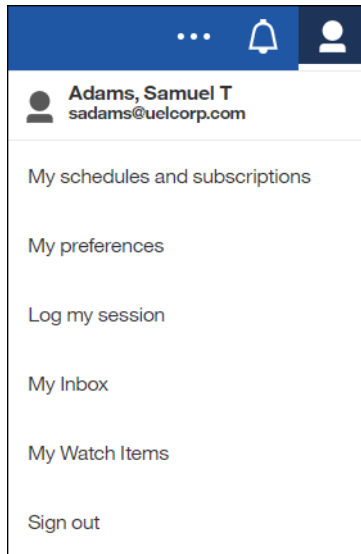
The More link enables you to establish a home page. Set As Home can be set to any page you have permission to access and want to view as your start page.



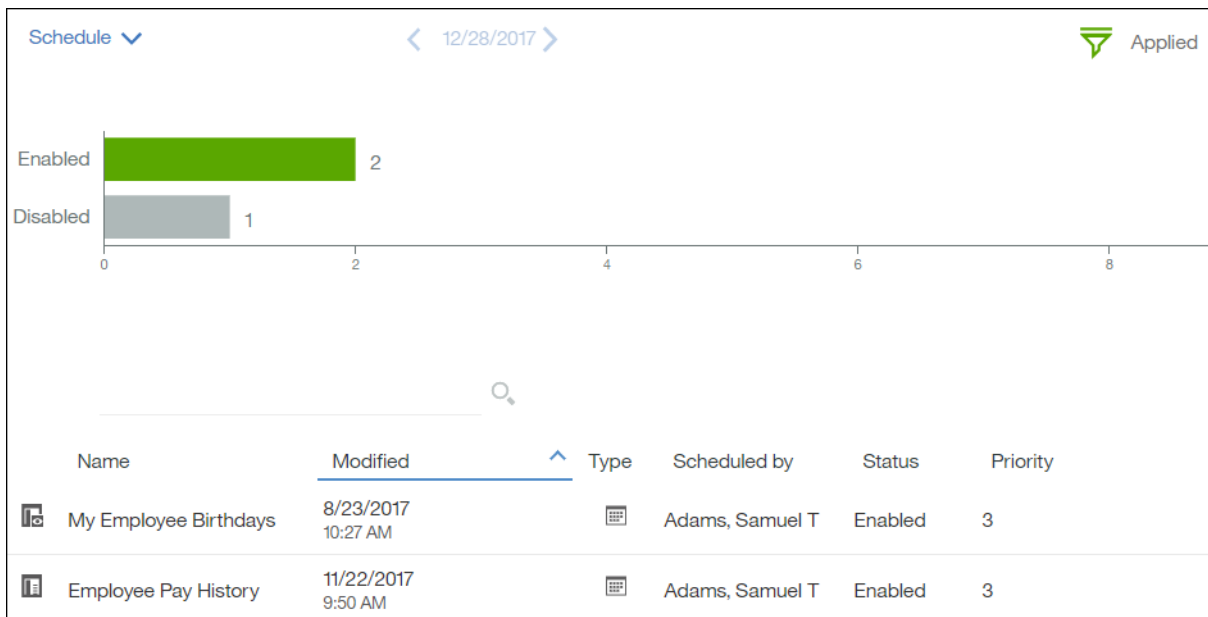
Select the Notifications icon to be notified of output from subscriptions (reports scheduled to run on a regular basis).



The Personal Menu enables you to view subscriptions and configure your preferences.



My Schedules and Subscriptions allow you to quickly view your scheduled items.



In the My Preferences menu, you can personalize how the portal displays content when you log in. You can select a preferred home page, report format, product and content languages, and more.

My preferences

[General](#) [Personal](#)

Home page Default

Report format HTML ▼

Turn on accessibility features

Show hints

Options for your region

Time zone (GMT-05:00) United States Time (Louisville) >

Product language English >

Content language English (United States) >

Bidirectional language support

Base direction for text Right-to-left ▼