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1. Reporting Data

The Library Reporting System (LRS), also known as Cognos for the name of the IBM software on which it runs, is a warehouse of library data. LRS data sources are: Aleph, Verde, the Harvard Depository Progress system, and the Reserves List tool. Data in the LRS includes order, invoice and budget data, circulation data including loans and loan history, active requests, reserve courses, reserves bibliographic data, reserves list data, items, and MARC bibliographic (HVD01) and holdings (HVD60) data. Monday through Friday, reporting data is up-to-date through midnight of the previous day. Support is available Monday - Friday, from 9am to 5pm.

2. Access the Library Reporting System

   a. Log on to Cognos

      • Open the following URL in Internet Explorer (IE8 is recommended) or Mozilla Firefox:
          http://reporting.lib.harvard.edu/ibmcognos
      • Enter your user ID and password
      • NOTE: The user ID is NOT case sensitive but the password IS case sensitive.
      • Click OK

   b. Log off of Cognos

      • From the Welcome screen: click on the Log Off link in the upper right corner
      • On the Public Folders screen: Click the Log Off link that displays in the top red bar

   NOTE: Please remember to log off when your reporting session is complete so the server knows to end the session.

3. Navigation

For report users the Welcome Screen only displays the icons under the left column labeled My Content: My home and Public folders.

Report authors will My Content and My Actions. Under My Actions icons for Open Query Studio, and Open Report Studio will display.
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**a. Locate Reports**
Public Folders contain all of the pre-defined reports and are accessible to all users. Folders are organized by subject.

- Blue folders contain reports related to the functional area denoted by the name of the folder. Report authors know these folders as packages.

- Yellow folders contain pre-defined reports from any number of functional areas. The following two folders will be of special interest to most users:
  - Temporary Report Sharing folder is the only folder in Public Folders where users can save reports to share with other Cognos users and authors
  - Previous Fiscal Year Reporting folder contains reports and data saved from the last day of the previous fiscal year

**b. Access Reports**
Click the name of the folder to view its contents:

**c. View Report Samples**
Sample reports allow users to preview what the report will look like. Each report in the Public Folders is followed by a saved sample:

- Open Orders by Vendor and Order Date Range
- Open Orders by Vendor and Order Date Range (Sample)

View sample reports two ways:

1. Click on the sample report’s name: Open Orders by Vendor and Order Date Range (Sample)

2. Click on the View output options icon to the right of the sample report’s name:
In this example, the top of the report displays the report title and then lists all of the prompts used in the example. The data appears below the title and prompt information:

Click the return arrow to go back and close the sample report:

**d. Search Report Folders**

The search bar is located in the top bar of the screen. Click the arrow to the right of the search box to reveal search options. Enter search terms in the search box, and click the search icon or press Enter to perform the search. Results from searching Name or Description field (or both) will display as shown below.

The Advanced link, located next to the search bar, allows users to refine the search by selecting the match type, date modified, scope and type of result.

**Method** specifies the type of match
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**Modified limits by date:**
- Any
  - Today
  - In last 3 days
  - In last week
  - In last month
  - In last 3 months
  - In last 6 months
  - In last 12 months
  - In last 36 months

**Scope limits by report location (Public Folders, My Folders):**
- This folder and its subfolders
- This folder only
- My Folders
- Public Folders

**Type limits by output (Report, Report View):**
- Any
  - Active Report
  - Adaptive analytics package
  - Agent
  - Agent view

Another search option is **Full text and all fields.**
Full text searches include all report metadata with the exception of the report content.

Full text search results display according to relevancy, as shown below. Results can be refined by **Type of output, Part (report type), Creation Date and report Owner.**
e. Run reports

To run a report, click the Run with Options icon. Selecting Run with Options allows users to specify the output format before opening the prompt page and running the report.

1. Choose the format:

![Run with options interface]

2. Choose the Delivery method. Users may choose to View the report now, Save the report, or Send me the report by email. Note: Users cannot choose the option to print the report.

**Delivery:**
- View the report now
- Save the report
- Print the report:
  - Printer location: [Select a printer...]
  - Send me the report by email

f. Email reports

To send a report by email select Send me the report by email. Cognos automatically adds the user’s email address to the list of recipients. Additional email addresses can be entered manually. Select the radio button and then select advanced options located on the top right of the screen:

To specify a time to run the report, or for additional formats, languages, or delivery options, use advanced options.

1. After clicking on advanced options, click Edit the options... under Delivery:

![Advanced options interface]

**Delivery:**
- Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.
- Save the report
- Print the report
- Printer location: [Select a printer...]
- Send the report by email [Select a printer...]
2. Enter additional email address(es), add email message text to the **Body** if desired. **Attach the report** checkbox is selected by default:

   ![Set the email options - Open Orders by Vendor and Order Date Range](image)

   Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include **Body** box empty and select the report as the only attachment.

   **To:**
   
   OIS User2 (oisuser2):
   
   **Cc:**
   
   ![Select the recipients...](image)

   **Subject:**

   Report: Open Orders by Vendor and Order Date Range

   **Body:**

   ![Change to plain text](image)

   ![Attach the report](image)

   ![OK Cancel](image)

3. Click **OK**, to save the Report View.
4. Click **Run** to run the report.

**g. Prompt pages**

Prompt pages allow users to customize the report output to meet their needs. Prompts with a red asterisk are required. Click finish after entering prompts to run the report.

NOTE: Values such as order unit, vendor id (vendor code) and sublibrary must be entered exactly as they appear in Aleph. Some prompts allow multiple values.

**Prompt Page: Open Orders by Vendor and Order Date Range**

Arrival Status not "C" (Complete) and Order Status = "SV" (sent to vendor). Prompts for Order Unit, Date Range, Order Type, and Vendor ID.

![Prompt Page](image)
4. Manage Reports

a. Create a Report View

Before a report can be customized or scheduled it needs to be copied as a Report View. To create a report view:

1. Find the report that you want to run, and click on the icon for Create a report view from the Actions column.

2. Specify a name, description (optional), and screen tip (optional) for the report:

   ![Report View screenshot]

   - **Name:** Report View of Open Orders by Vendor and Order Date Range
   - **Description:**
   - **Screen tip:**

3. Click on Select My Folders to save the Report View in your personal directory called My Folders.

4. Click on My Folders tab to access the report:
b. Customize reports

Reports can be customized (save prompts and output format preferences) once it is saved to My Folders. Reports in My Folders are not accessible by other Cognos users. (Reports that are intended for use by others are saved in Public Folders > Temporary Report Sharing). To customize a report:

1. Click **Set properties** icon

2. Click on the second tab, **Report View**, to set properties.

3. Choose the **Default action**: 

4. To change the default values, select **Override the default values** box and choose the desired output format **NOTE**: Users cannot change the Language settings.

5. Under **Prompt values**, click the **Set...** link to access the prompt page.

6. Enter prompt values and click **Finish**.
7. **Prompt values:** now displays your first entry. Select View all to see the complete list. 
   **NOTE:** If you are scheduling a report, make sure Prompt for values is NOT checked. The report will not run as scheduled if it is set to prompt for values.

8. Click **OK** to save and return to My Folders.

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**5. Report Schedules**

A report can be scheduled to run at a specific time or on a regular recurring basis. Scheduled reports can be saved and viewed in Cognos, or sent via email to a list of recipients. Cognos also offers a variety of output formats including PDF, Excel and CSV (comma separated values). All Cognos users can schedule reports.

A report must be saved before it can be scheduled. Reports in **Public Folders must first be saved as report views in My Folders** before they can be scheduled.

Cognos cannot have more than one schedule per report. If your scheduling needs require more than one schedule, create a **Report View** with a different name for each schedule.

**a. When to schedule reports**

Reports should be scheduled to run during normal business hours: **9am-5pm Monday through Friday.** Reports can be scheduled to run by day, week, month, or year. Remember that (with the exception of Z00R tables) reporting data is not live HOLLIS data, so scheduling a report to run more than once in the same day will always yield identical results.

Reporting data is updated beginning at midnight from Sunday through Thursday. Between Monday and Friday, therefore, the reporting data is up-to-date as of midnight of the previous day. Monday’s reporting data contains updates from Friday through midnight on Sunday.

If the system is not available for any reason when a report is scheduled to run, Cognos will run the report when the system is back up.

**b. How to schedule reports**

1. Find the report in **My Folders**, then select the **Schedule** icon in the Actions column to bring up the Schedule screen.
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2. Under **Frequency**: select how often the report should run.

3. **Under Start**: select the date and time when the report should start running. Remember to specify a date between 9-5 Monday through Friday.

4. **Under End**: select an end date for the report schedule, or select No end date to run the report indefinitely.

5. **Check Override the default values to customize Formats** and **Delivery** options. **NOTE** that **Print the report** is not available as a Delivery option.
6. Click **OK**. The schedule is created and the report runs at the next scheduled time.

**Tips for report scheduling:**

- To specify different or new prompt values, check **Override the default values** and then click **Set...** to edit the prompts.

- If a schedule is no longer needed it can be deleted by selecting **More...** in the Actions column, and then Remove the schedule from the list of Available actions.

- Alternatively, a schedule can be suspended by selecting **Disable the schedule** checkbox and then enabled at a later time by unchecking the box.

**c. Manage report schedules**

To access schedule management, click on the drop-down arrow next to **My Area Options** and select **My Activities and Schedules**.

My Activities and Schedules allows users to view all of their current, past, and upcoming reports as well as manage schedules.

Click the return arrow icon in the top toolbar to leave the screen.

Once a scheduled report has run successfully its output can be viewed under actions in the **My Folders** tab. Click on the view output versions icon:
6. Get Help

**a. Aleph Support Center**

Please contact us via the Aleph Support Center for:

- Questions or problems using the reporting system
- Suggestions for new or existing reports
- Other enhancement requests

![Aleph Support Center](image)

The Aleph Support Center can be accessed from within Cognos by selecting it from the tabs. Fill out the form and click Send to open a support ticket.

**b. Training Documentation**

A copy of this document can be found on the Training tab of the Aleph Documentation Center at: [http://hul.harvard.edu/ois/support/docs-aleph-train.html](http://hul.harvard.edu/ois/support/docs-aleph-train.html)

**c. Reporting Working Group**

The Reporting Working Group is currently an informal group of volunteers who encourage and support the use of the Hollis Library Reporting system, including development of report author skills and other activities such as testing of new releases, evaluating changes to the data model, and defining new reports of general interest. The group maintains an iSite at [http://isites.harvard.edu/icb/icb.do?keyword=k35102](http://isites.harvard.edu/icb/icb.do?keyword=k35102) that has helpful documentation, tips, and resources including IBM documentation for Cognos Connection, Query Studio and Report Studio.
The iSite is also accessible from within Cognos by selecting the tab for Reporting Working Group iSite.