ACADEMIC AFFAIRS

Resource Profiles

Cognos Resource Profiles (Detailed Instructions)

The Office of the EVC highly recommends you read through these instructions PRIOR TO accessing the Cognos Profiles for the first time.

To access the Cognos Resource Profiles:

1. Select the desired report:
   - [Individual Unit Report](#)
   - [Divisional Unit Comparison Report](#)
   - [Data Point Comparison Report](#) (available only in Cognos environment)
     The Data Point Comparison Report allows you to view resource data for one or more individual data points for one or more Divisions or Major Units.

2. Enter your Active Directory logon information
3. Proceed as you have done in the past to select the data you wish to view

Report Save Options

To download any report to Excel:

1. Click the ⬛ icon in the upper right section of the screen
2. Select "View in Excel Options"
3. Select "View in Excel 2007 Format"
4. Open or Save the file to your computer

You also have the option to create a PDF version of your report (click "View in PDF Format"). Clicking "View in HTML Format" will toggle between PDF view and web page view. We do not recommend using the "View in XML Format" options.

To save a report for future use or viewing, click the 📂 icon ("Keep this version") in the upper right section of the screen, and select one of two options:

1. "Email Report" to send a copy to yourself or others
2. "Save as Report View" to rerun the same report at a later date. This option is similar to the Save Query option in the LinkFamily suite of applications.

To rerun a report with different data points, units and/or years, click the ▶ icon in the upper right section of the screen and reselect.

Although you will find more icons in the upper right section of your screen, we do not recommend your clicking any of those. The Cognos environment provides additional functionality that we are not yet utilizing.

Viewing Detail Data

Once you're viewing your desired summary report, to obtain drill-down detail data simply click on one of the available hyperlinks:

1. Clicking on a unit name (first column) will open a new window with the detail for that unit for that data point for the years displayed in the summary report.
2. Clicking on a cell entry will open a new window with the detail for a single unit for a single year.
3. Clicking on a hyperlink in the Total row (Divisional Comparison Report only) will open a new window with detail for that data point for all units in the division for a single year.
4. If a report entry is not hyperlinked it means there is no detail data available for that data point.

5. Once in a detail report, you have the same options to save in Excel.

Note about Browser compatibility:

Cognos has been optimized for particular browsers. For Windows based machines, IBM recommends Internet Explorer versions 8 and above and Firefox versions 17 and above. For Apple machines, IBM recommends Firefox versions 17 and above. All other browsers and versions will have limited Cognos capabilities. Additional information can be found at: http://publib.boulder.ibm.com/infocenter/prodguid/v1r0/clarity-reports/report/html/prereqsForProduct?deliverableId=1283262749193

The Cognos reports are still in development so you can expect to see further enhancements in the coming weeks and months. One current feature you will find missing from the Cognos profiles is the year-to-year percent change for data points (currently the last column in the existing reports). We're working on resolving this issue and will notify users when this (and other) enhancements are released.

If you have trouble accessing the Cognos profiles contact Sandy Beattie at x22610 or sbeattie@ucsd.edu. Also notify Sandy if you encounter any other bugs when using the profiles, would like to recommend future enhancements or provide any other feedback.