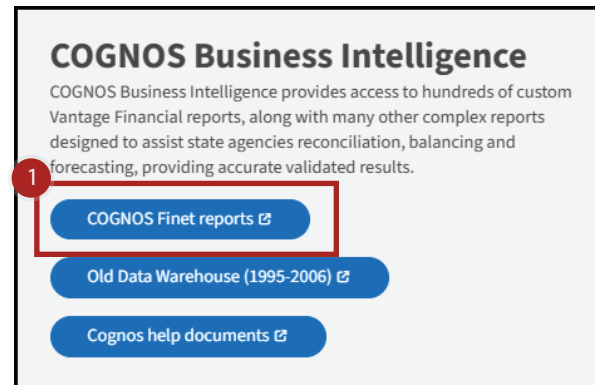




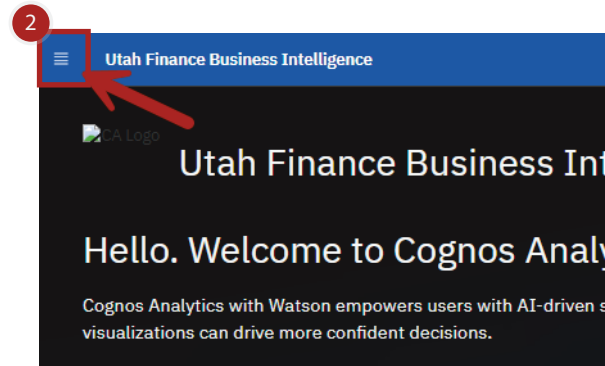
Cognos navigation basics


Introduction


1. Open Cognos
 - Go to the Data Warehouse link on the finance.utah.gov site.
 - Click COGNOS Finet reports.




2. Open the menu
 - Click on the hamburger navigation (three bars top left)

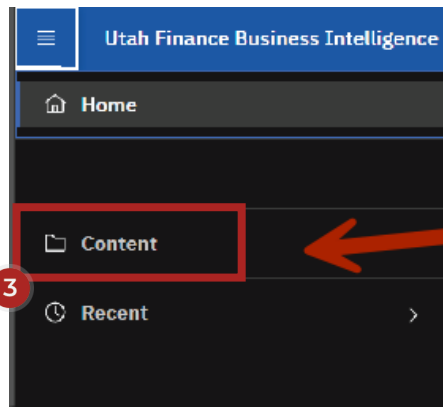


Home () - will return you to the home screen, if you are within a report.

Content () - all data warehouse folders, such as FINET, Finance, PTS, FTE, Loans, etc. are accessible within Content. You can create sub folders within your my content folder.








Recent () - click > to see a list of the recent reports you have run. (specific access is required),

NOTE: On the left side navigation, you will see Home, Content, and Recent.

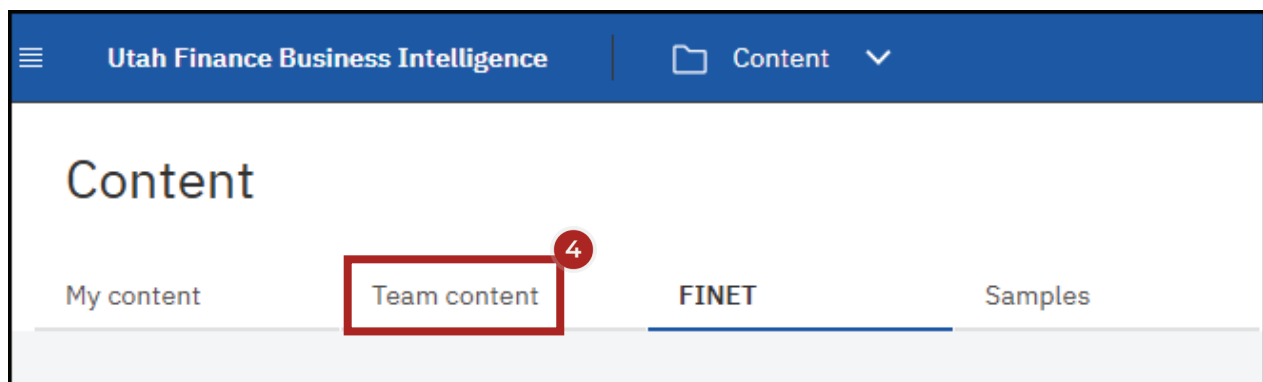


3. Click **Content**

NOTE: On the right side of the screen, you will see Filter, Sort, Add folder, Details, Refresh, Tiles view, and List view.

-  Filter by Type or Modified date
-  Sort by Name, Modified date, or Type in Ascending or Descending order
-  Add folder - the ability to add a folder may be limited to the My content tab
-  Details - shows the creation and modification dates, the owner name, and content type
-  Notes
-  Tile view - displays all elements in an array
-  List view - lists all elements

4. Select the tab, **Team content**





Folder or Sub folder



Report



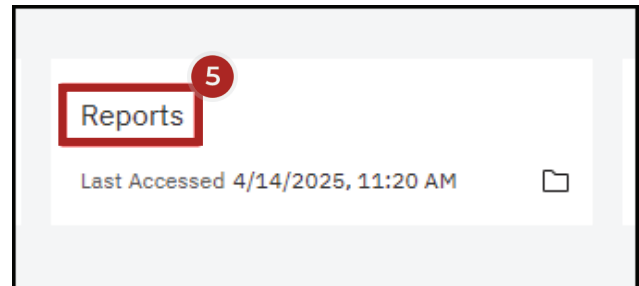
Link



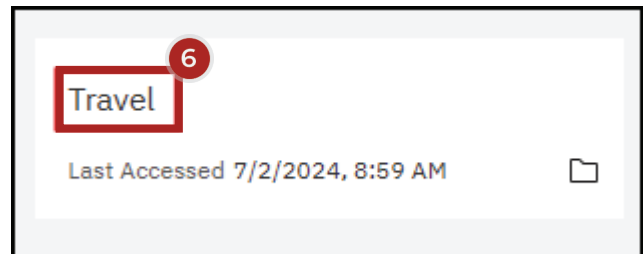
Query

NOTE: When navigating reports and folders (and sub-folders), pay attention to the icon which indicates the type of element being displayed.

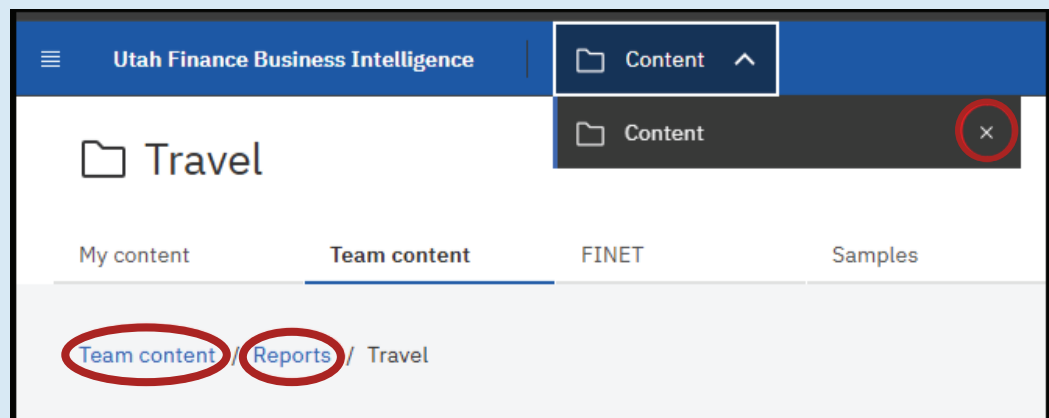
5. Select the folder, **Reports**.



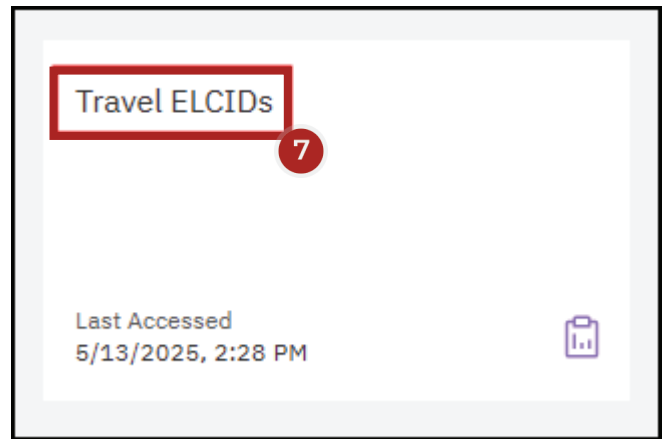
6. Select the folder, **Travel**.



NOTE: If you navigate away from Team content by clicking a different tab (My content, FINET, Samples) or Home (🏠), when you return to the Team content tab you will still be in the Travel folder. To navigate out of that folder, click **Reports, Team content**, or at the top of the screen, click the down arrow by Content, then click **x**.



7. Select the report **Travel ELCIDs**.



Note: In the top left corner you will see Edit, Save, Save options, and Share.



Edit - reveals the report's underlying structure, which isn't needed for basic users



Save, Save as, and Save as report view - save, and rename if desired, the report to the My content



Share - allows users to send, by email, an image of and link to this Cognos screen

8. (Optional - select a department, you will discover that many reports require some selections) Click **Finish**



Note: In the top left corner you will see Run, Refresh, and Select a format.



Run - return to the previous screen

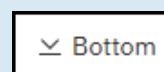
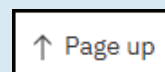
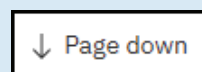
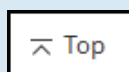


Refresh



Select a format - allows users to view or download the information in an HTML, PDF, Excel, Exceldata, CSV, or XML format

Note: In the bottom left corner you will see Top, Page up, Page down, and Bottom. Use those buttons to view other pages of the report.



Additional resources

Additional Resources

To learn more about navigating in Cognos, look at:

- The **Team content** tab in the **Help | FAQ | How To** folder; or
- Navigate to the **Data Warehouse** page at finance.utah.gov. Select:
 - **Help and documentation**; or
 - **Quick reference guides**

Quick Links

COGNOS Business Intelligence

Chart of accounts

Finance queries

Running queries in Microsoft

Accounting types and posting codes

Data dictionary

Help and documentation

Quick reference guides

Other queries