



# IBM Cognos Analytics

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## *Create a Crosstab*

The following instructions cover how to create a crosstab report in IBM Cognos Analytics. A crosstab is a report type in Cognos that displays an analytical look at overall numbers. Crosstabs do not display individual data well, but are better used for summary reports or to compare groups.

### **Navigate to Cognos**

Cognos Analytics supports all browsers with the exception of Microsoft Edge.

Log into Cognos by going to <https://insight.illinoisstate.edu/>. (You must use a computer that is connected to the ISU network.) Log in using your ULID and central login password.

### **Table of Contents**

[Access the Editing tool to Create a New Report](#)

[IMPORTANT - Set Report Options](#)

[Select a Report Type](#)

[Select Data Source](#)

[Add Data Items](#)

[Apply Filters and Prompts](#)

[Summarize Data](#)

[Create Report Title](#)

[Change Report View](#)

[Save Report in My Content](#)

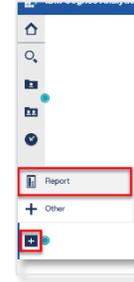
[Return to Home](#)



## Access the Editing Tool to Create a New Report

To create a new report, click the new button at the bottom of the navigation pane.

1. Click the **New**  icon in the bottom left corner.
2. Click **Report**.
3. Confirm the **Blank** template is selected.
4. Click the **OK** button.

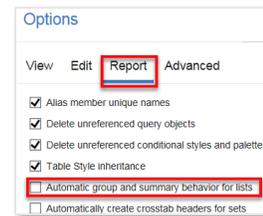
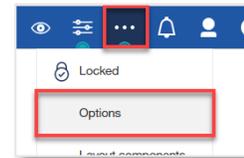


## !Must be done before editing or creating any report!

### Set Report Options

For every report you edit or create, **you must set your default option for Summarization.**

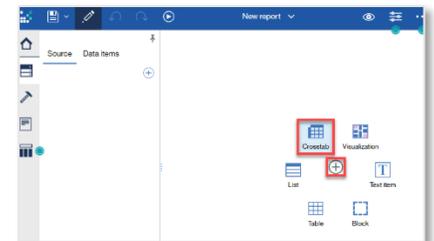
1. Click the **More**  icon in the upper right corner.
2. Click **Options**.
3. In the **Options** window, click the **Report** tab.
4. Uncheck **Automatic group and summary behavior for lists**.
5. Click the **OK** button.



### Select a Report Type

The report type needs to be selected before the report can be created.

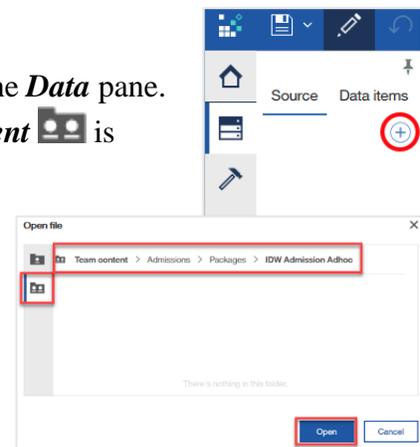
1. Click the **Plus**  icon in the center of the screen.
2. Click the **Crosstab**  icon.
3. Click the **OK** button in the pop up window.



### Select Data Source

The folder the data is located in has to be selected for the data items to be added to the report.

1. Click the **Add report data**  icon in the **Source** tab of the **Data** pane.
2. The **Open file** window will appear. Confirm **Team content**  is selected in the left pane.
3. Select the package you wish to work within.
4. Click the **Packages** folder.
5. Continue to navigate to the folder where the data is stored.
6. Click the **Open** button.



The folders for the data items will appear in the **Source** tab.



## Add Data Items

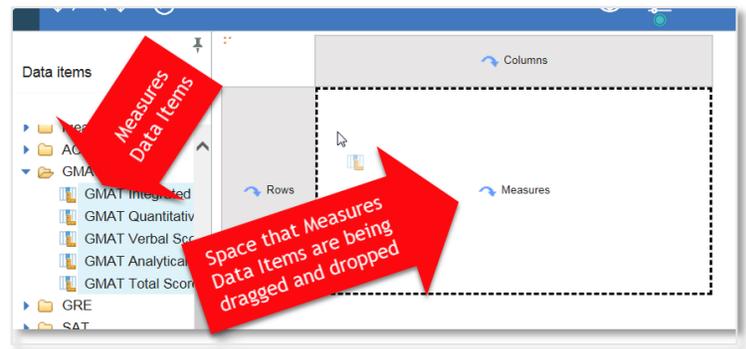
The data items that will appear in the report must be added from the **Source** tab of the **Data** pane.

1. Click the arrow in front of the selected data source to expand.
2. Continue to click the arrows in front of the desired folders until the data item you wish to add is exposed.

*Data items may be in several different folders.*

3. Add data item using drag and drop:
  - i. Click on the desired data item.
  - ii. Hold down the left mouse button while moving the mouse over the report until the correct part of the report is blinking.
  - iii. Drop the data item in place by releasing the left mouse button.

*Measure data items are the only ones that can be dropped into the **Measures** part of the report.*



4. Continue to add data items until report is filled.

## Apply Filters and Prompts

Filters and prompts are applied to data in order to narrow down the information that appears in the report.

- *Filters* are applied and stay the same every time the report is ran.
- *Prompts* are selected before the report is ran each time. The information in the report changes each time based on the prompt selections.

*When creating a report from the **Admissions** package, the **Current Weekly Date Filter** **MUST** be added.*

1. Under the **Source** tab in the **Data** pane, on the left side of the screen, click the arrow in front of the **Filters and Prompts** folder to expand the folder and see all prompts and filters that are include in the package.
2. Add one filter/prompt at a time:
  - i. Double click on the filter that needs to be added.
3. Add several filters/prompts at the same time:
  - i. Click on the first filter or prompt to be added.
  - ii. Hold down the **Control** key while clicking on each additional filter or prompt.
  - iii. Drag and drop selected filters and prompts into the report area.
4. Click the **OK** button in the pop up window that says the filter(s) has/have been added.

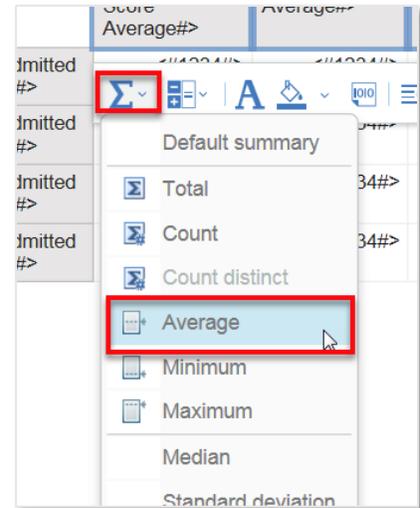


## Summarize Data

Numerical data items can be summarized in several ways including averaged, counted, and totaled.

*If data items have been grouped, a summary will automatically be calculated for each grouped value. If there are no grouped data items, the summary will simply appear at the end of the report.*

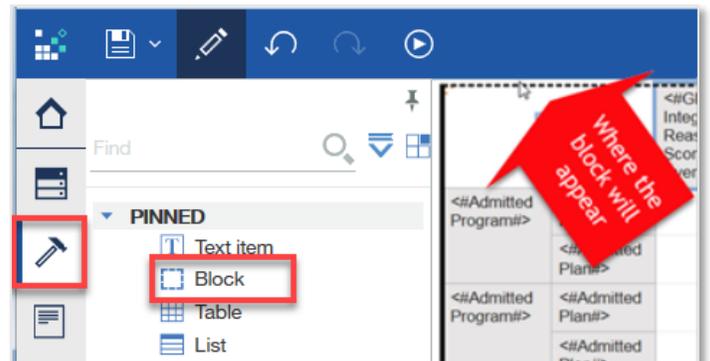
1. Click the column header of the data item that is to be summarized.  
*If summarizing more than one data item, hold down the **Control** key while clicking on the column header(s) of the additional data item(s).*
2. Click the **Summarize** icon  $\Sigma$ .
3. Select from the summarize options.  
*Total – the sum of all values added together.  
Count – the number of rows.*



## Create a Report Title

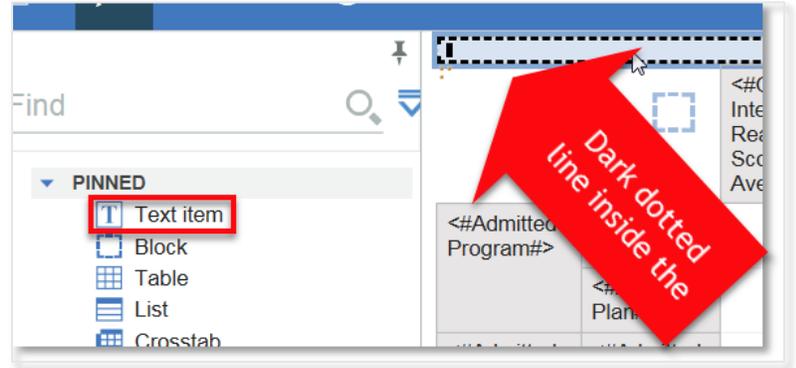
A report title can have as many lines as the user desires, but each line must be added in two steps.

1. Click the **Toolbox**  icon in the top, left corner.
2. Drag and drop the **Block** tool in the desired location on the report. To do this:
  - i. Select the word **Block**.
  - ii. While holding down the left button of the mouse, move the mouse to the top of the report.
  - iii. Once there is a blinking line on the left side of the report, release the left mouse button.
3. Now that the Block is in place, drag and drop the **Text item** in the block. To do this:





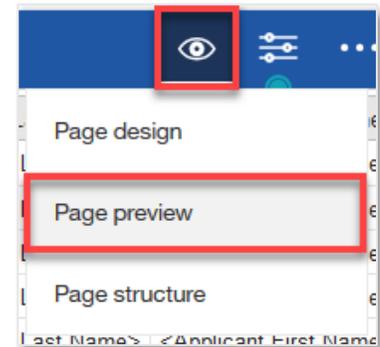
- i. Select the word *Text item*.
  - ii. While holding down the left button of the mouse, move the mouse over the block.
  - iii. Once the inside of the block is outlined in a dark dotted line, release the left mouse button.
4. In the *Text* pop up window, type the title of the report.
  5. Click the *OK* button.



### Change Report View (Preview Data)

The default view while editing a report is the *Page design* view. This means that the information is not populated in the report. At any point, the report view can be changed.

1. Click the *Page views*  icon at the top right of the screen.
2. Click on *Page preview*.  
*The current view is Page design.*
3. Select the answers to fill in the prompts.
4. Click the *OK* button.

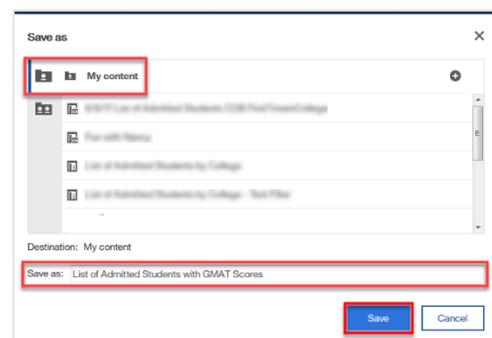


### Save Report in My Content

In order to access the report with the edits at a later time, it needs to be saved to My Content.

*When saving edited reports, the report query is being saved. The data displayed in the report is NOT being saved. This data will be updated when the package data is updated.*

1. Click the arrow next to the *Save*  icon.
2. Click *Save as*.
3. In the left pane, click on *My content*.
4. Use the *Save as* field to give the report a meaningful name.
5. Click the *Save* button.



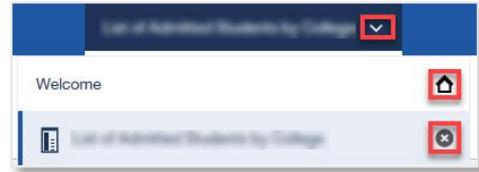


## Return to the Home/Welcome Screen

When you are done viewing a report, you can go back to the Welcome page two different ways:

Switcher Drop Down:

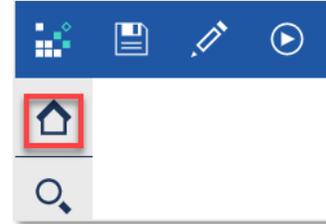
1. Click the dropdown arrow by the report name.
2. Select [Home](#) , or select the  next to each page to close it.



Home Icon

1. Click the [Home](#)  icon in the upper left corner.

The **Welcome** screen will load.



Questions?

Visit [data.IllinoisState.edu/training/](http://data.IllinoisState.edu/training/)

or

Contact [eda@ilstu.edu](mailto:eda@ilstu.edu)