


SAP Concur Reporting

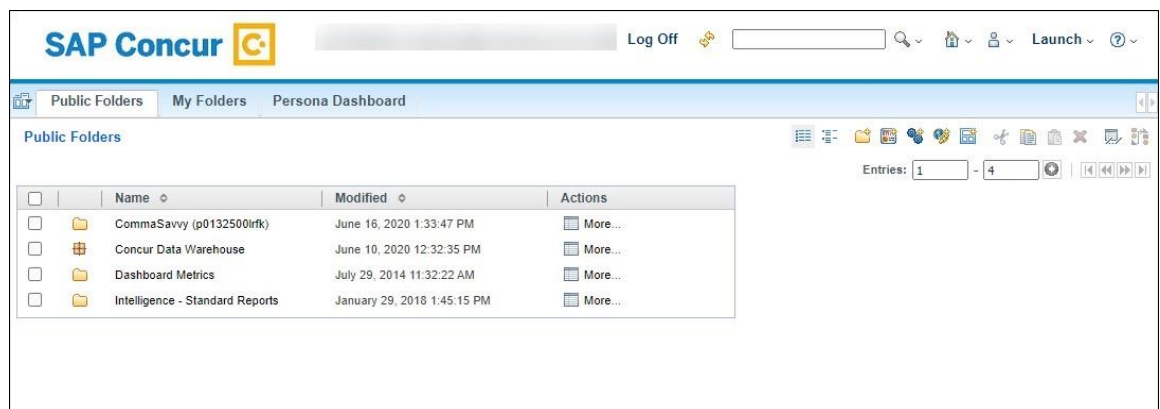
Cognos 11 Transition

Section 1: Home Page


When you click Intelligence from the **Reporting** menu in SAP Concur solutions, the Cognos Home page appears.

Cognos 10 UI

In Cognos 10, the Home page defaults to the Public Folders view, but you can customize the Home page to display to specific page, report, or dashboard of your choosing by clicking the home icon, , and then clicking *Set View as Home*.





Cognos 11 UI

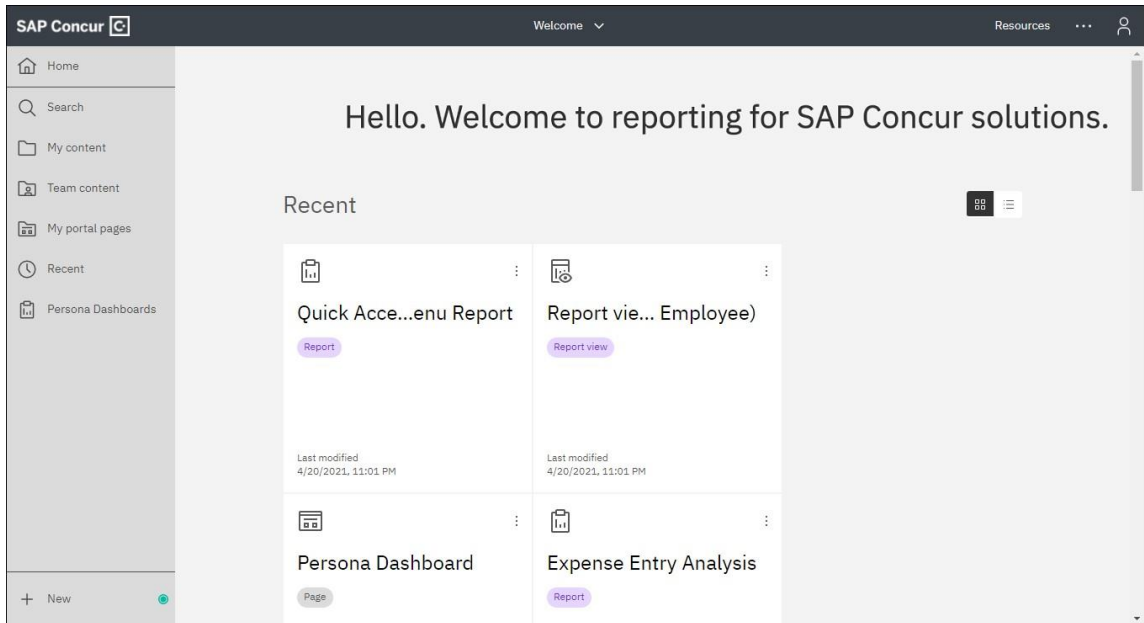
In Cognos 11, the Home page defaults to the Welcome page, which contains a list of the most recently viewed reports, dashboards, and pages. Like the Cognos 10 UI, you can customize the Home page to default to a page, report or dashboard of your choosing by clicking the **More** icon, , in the top navigation bar, and then clicking *Set as home*.

In Cognos 11, most of the icons are now located on the left navigation pane instead of the upper-right corner of the Home page.

The public and personal folders and the Persona Dashboards are now also available from the left navigation pane. Some of the features in the existing UI have been renamed in Cognos 11. For example, **Public Folders** is now renamed to **Team content** and **My Folders** is now renamed to **My content**.




 For more information about the icons on the Home page, refer to the [Icons](#) section in this guide.


 For more information about navigating in Cognos 11, refer to the [Navigation](#) section in this guide.




ICONS

A number of icons previously available on the Cognos 10 Home page are no longer available on the Cognos 11 Home page, but the same functionality is still available in Cognos 11. The access to the functionality has just been moved to another part of the UI in Cognos 11.

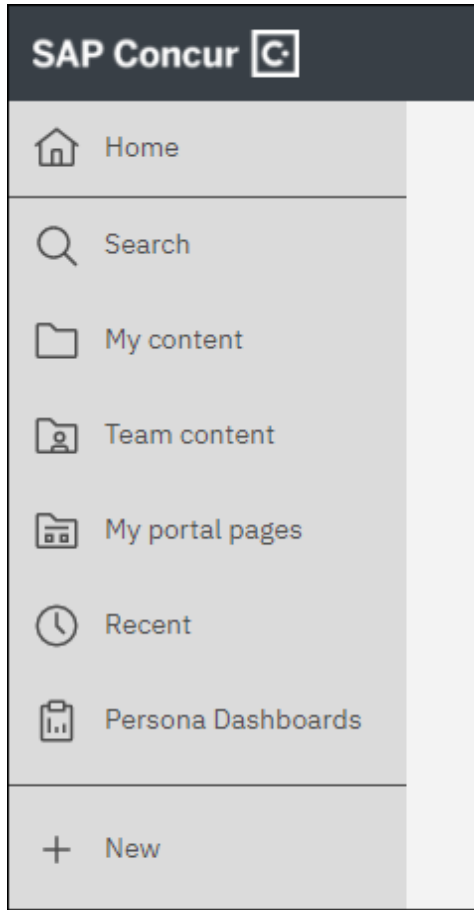
For example, in Cognos 10, there are icons for creating a new folder, , or job, , and for copying selections, , on the Home page.

In Cognos 11, the options for creating a new folder are moved to the top of the folder list, and the option for creating a new job is accessed by clicking the **New** icon, , on the left navigation bar.

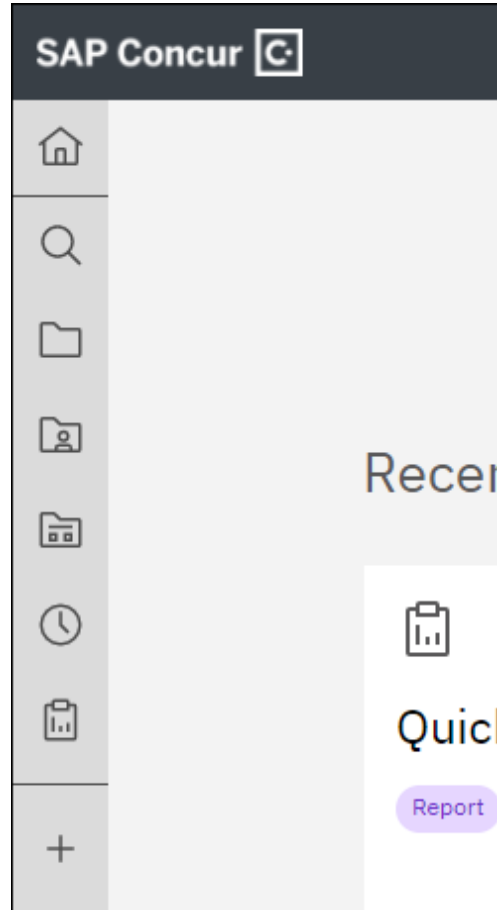
The option for copying folders or reports is now available at the individual folder, report, or dashboard level from the **More** menu, which is accessed by clicking the **More** icon, . More information about the **More** menu and where functionality is now available in Cognos 11 will be covered later in this guide.

NOTE: The width of your browser window and what you currently have displayed in the main view determines whether the left navigation pane displays the icons along with the icon name or whether the pane displays the icons only.

Example of left navigation pane expanded with both the icons and icon names displayed:










Example of the left navigation pane collapsed with only the icons displayed:



Home page icons key:

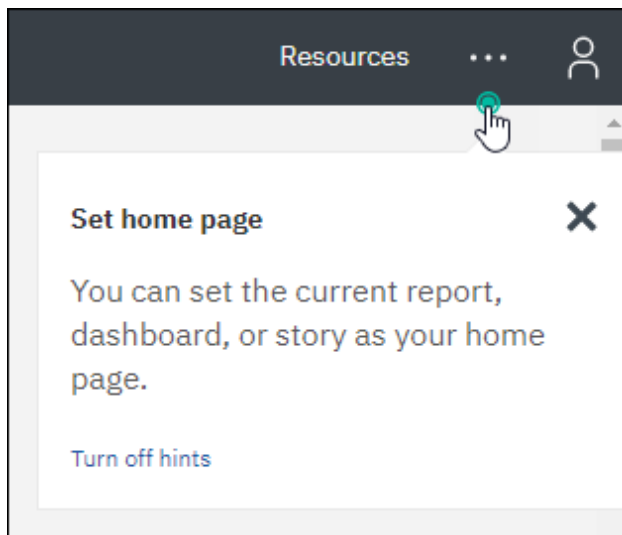
Icon	Name	Description
Top Navigation Bar Icons		
	More	Provides the Set as home option, which can be used to make the report, dashboard, or story currently displayed the default Home page.
	Personal menu	Provides access to My schedules and subscriptions, My preferences, My Watch Items, About, and the Sign out option.
Left Navigation Pane Icons		
	Home	Opens the Cognos 11 Home page.

Icon	Name	Description
	Search	Opens the Search feature from the left navigation pane. The Search feature is used to globally search the My content and Team content folders for the folders, reports, dashboards, or jobs that you have access to.
	My content	The My content icon in Cognos 11 is the equivalent of the My Folders tab in the existing UI.
	Team content	The Team content icon in Cognos 11 is the equivalent of the Public Folders tab in the Cognos 10 UI. This is where you can access the Duke University or Intelligence – Standard Reports folder.
	My portal pages	Opens the My portal pages list from the left navigation pane.
	Recent	Opens the Recently viewed list from the left navigation pane.
	Persona Dashboards	The Persona Dashboards icon in Cognos 11 is the equivalent of the Persona Dashboard tab in the Cognos 10 UI. Opens the Quick Access Menu page.
	New	Provides options for creating new jobs and accessing Report (formerly known as Report Studio), drill-through definitions, Query Studio, and Workspace.


HINTS

The green dot displayed in the Cognos 11 UI indicates a UI hint is available for that feature. Clicking the green dot opens a brief description of the feature.

You can turn off the hints feature by clicking the **Turn off hints** link.

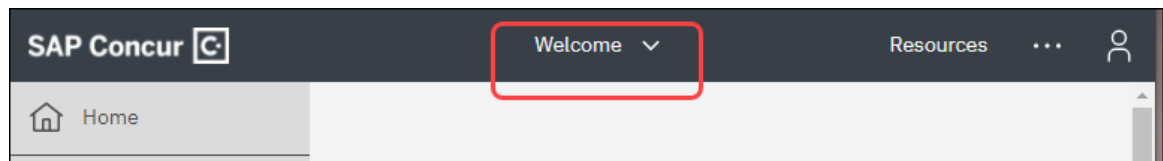


RECENTLY VIEWED LIST ON THE TOP NAVIGATION BAR

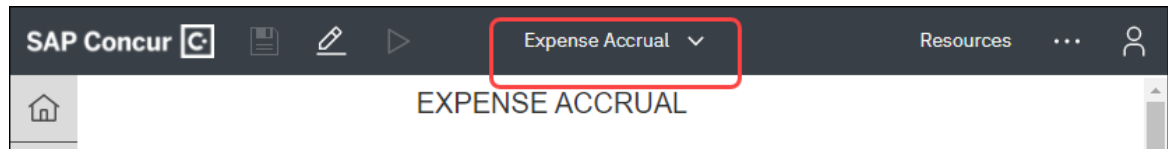
The recently viewed list on the top navigation bar provides a list of the recently viewed pages, reports, or dashboards for the current Cognos session. You can use the list to quickly navigate back to something you recently viewed. This same list of recently viewed pages, reports, and dashboards can also be accessed from the left navigation pane by clicking the **Recent** icon, .

The name of the recently viewed list on the top navigation bar displays the name of the page currently viewed.

For example, on the default Home page, the list displays *Welcome*.

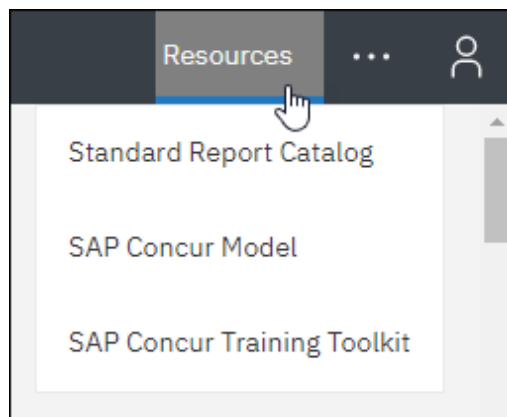


If you are viewing a report, such as the Expense Accrual report, the list displays the name of the report.



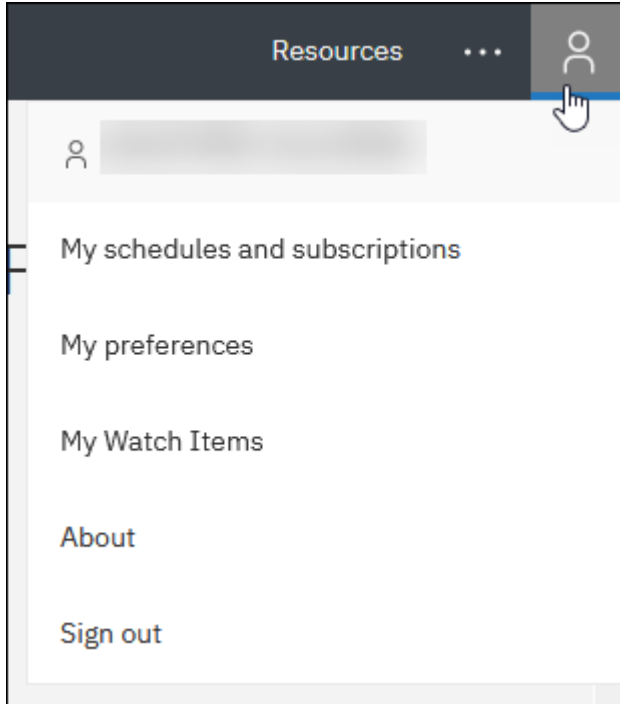
RESOURCES MENU ON THE TOP NAVIGATION BAR

The **Resources** menu on the top navigation bar provides links to the Analysis / Intelligence documentation and SAP Concur Training Toolkit.



PERSONAL MENU ON THE TOP NAVIGATION BAR

The **Personal** menu on the top navigation bar provides links to your schedules, subscriptions, preferences, and watch items. It also contains the **Sign out** option for logging out of Cognos.



Section 2: My Content (Formerly My Folders)

In Cognos 11, the My Folders feature is renamed to My content, and the folders, and contents of the folders previously located in My Folders are now located in My content. The My content feature is where a user can store their personal reports and content. Only the creator of the content has access to the contents of the **My content** folder.




















































































Cognos 10 UI

The My Folders feature is accessed by clicking the **My Folders** tab.

The screenshot shows the SAP Concur Cognos 10 UI interface. At the top, there is a navigation bar with the SAP Concur logo, a search bar, and a 'Log Off' button. Below the navigation bar, there are three tabs: 'Public Folders', 'My Folders', and 'Persona Dashboard'. The 'My Folders' tab is selected, and it displays a list of folders and reports. The list has columns for 'Name', 'Modified', and 'Actions'. The 'Actions' column contains icons for 'More...', 'Refresh', 'Delete', and 'Print'.

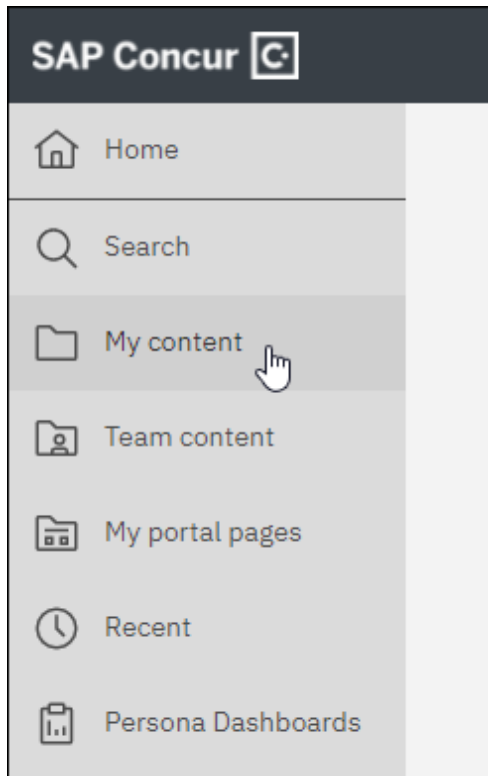
Name	Modified	Actions
Analysis Class	December 30, 2016 3:34:22 PM	More...
Harsh Test	November 13, 2018 2:13:51 PM	More...
Kiran123	March 7, 2019 4:35:38 PM	More...
Rekha	November 16, 2017 10:44:21 AM	More...
A Exceeds before	November 3, 2016 10:05:45 AM	More...
A Exceeds Localized	November 3, 2016 10:06:38 AM	More...
Cash Advance Workflow	September 20, 2016 1:15:53 PM	More...
CC Type for Travel data	September 26, 2016 11:05:43 AM	More...
COA dimrptworkflow	April 21, 2016 9:43:58 AM	More...
Dashboard - Department Manager Overview	January 23, 2017 12:51:39 PM	More...
Employee Details	November 15, 2017 12:59:55 PM	More...
Employee Roles	November 15, 2017 1:00:17 PM	More...
Expense Accrual by Date Range_test	July 27, 2020 9:52:04 AM	More...
Expense MVP	November 1, 2016 2:49:58 PM	More...
Japanese Custom After Reference ID	October 4, 2016 4:19:07 PM	More...
Test Report - Currency Keys and Amounts	May 4, 2016 4:11:09 PM	More...
test report -QS fixpack13	May 28, 2019 10:18:13 AM	More...
Travel Program Overview	October 5, 2016 11:12:49 AM	More...
Travel Program Overview - From Dev 02	October 4, 2016 12:16:45 PM	More...

The **Actions** column contains icons for the different options for managing individual folders and reports, and the option for running reports.

Modified	Actions
December 30, 2016 3:34:22 PM	More...
November 13, 2018 2:13:51 PM	More...
March 7, 2019 4:35:38 PM	More...
November 16, 2017 10:44:21 AM	More...
November 3, 2016 10:05:45 AM	More...       More...
November 3, 2016 10:06:38 AM	More...       More...
September 20, 2016 1:15:53 PM	More...     More...
September 26, 2016 11:05:43 AM	More...     More...
April 21, 2016 9:43:58 AM	More...       More...
January 23, 2017 12:51:39 PM	More...       More...
November 15, 2017 12:59:55 PM	More...       More...
November 15, 2017 1:00:17 PM	More...       More...
July 27, 2020 9:52:04 AM	More...        More...
November 1, 2016 2:49:58 PM	More...       More...
October 4, 2016 4:19:07 PM	More...       More...
May 4, 2016 4:11:09 PM	More...       More...
May 28, 2019 10:18:13 AM	More...     More...
October 5, 2016 11:12:49 AM	More...      More...
October 4, 2016 12:16:45 PM	More...      More...

Cognos 11 UI


You can access the My content feature from the left navigation pane.

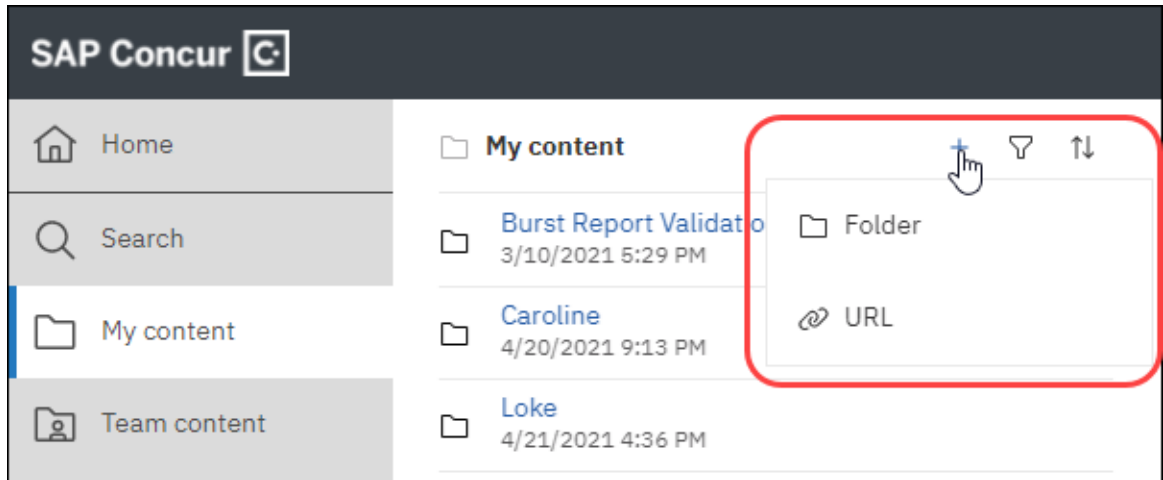



When you click My content, the contents of your **My content** folder are displayed to the right of the left navigation pane.

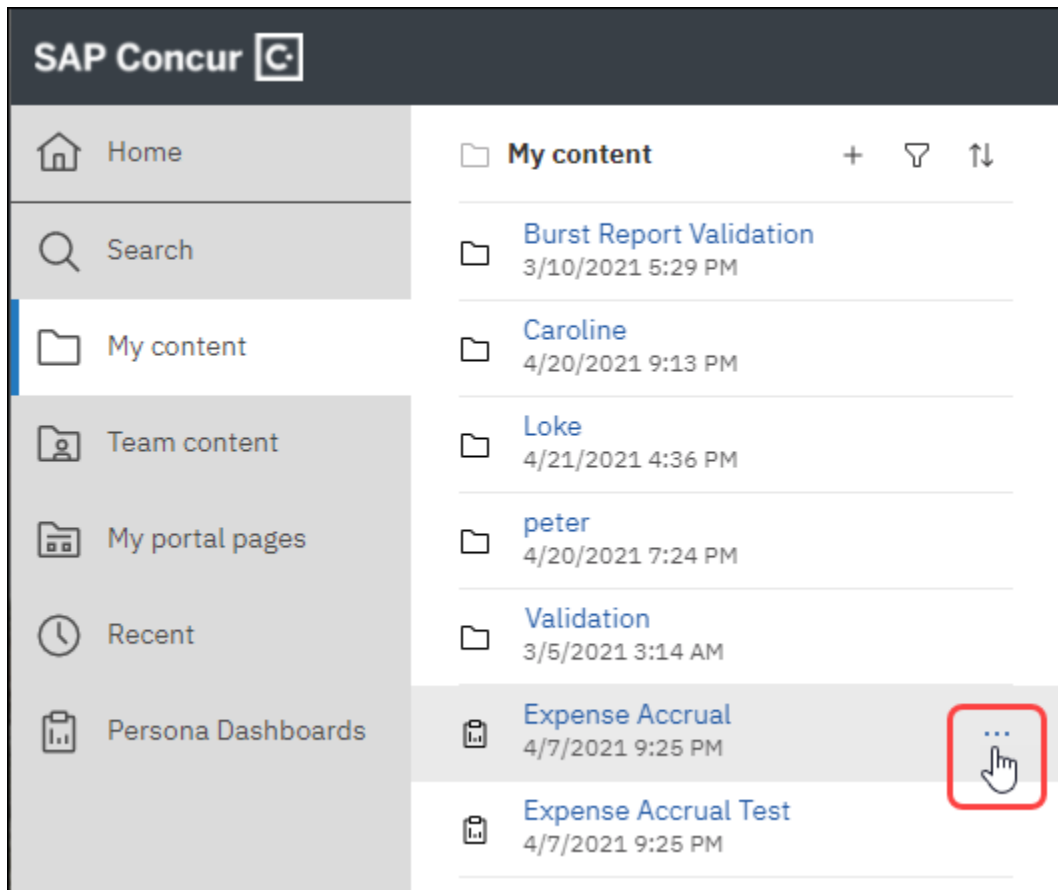
The screenshot shows the SAP Concur interface. The top header is dark grey with the SAP Concur logo. The left navigation pane is light grey and contains several menu items: Home, Search, My content (highlighted with a blue bar), Team content, My portal pages, Recent, Persona Dashboards, and a New button at the bottom. The main content area is white and displays the contents of the 'My content' folder. At the top of this area is a folder icon, the text 'My content', and three icons: a plus sign, a funnel, and a double-headed arrow. Below this are ten items, each with an icon, a title, and a timestamp:


- Burst Report Validation (Folder icon) 3/10/2021 5:29 PM
- Caroline (Folder icon) 4/20/2021 9:13 PM
- Loke (Folder icon) 4/21/2021 4:36 PM
- peter (Folder icon) 4/20/2021 7:24 PM
- Validation (Folder icon) 3/5/2021 3:14 AM
- Expense Accrual (Document icon) 4/7/2021 9:25 PM
- Expense Accrual Test (Document icon) 4/7/2021 9:25 PM
- Report view of Expense Accrual (Document icon) 4/9/2021 9:27 AM
- Shortcut to Expense Accrual (Shortcut icon) 3/31/2021 4:43 PM

In the **My content** folder, the option for creating a new folder or URL is available at the top of the folder list by clicking the **New** icon, .

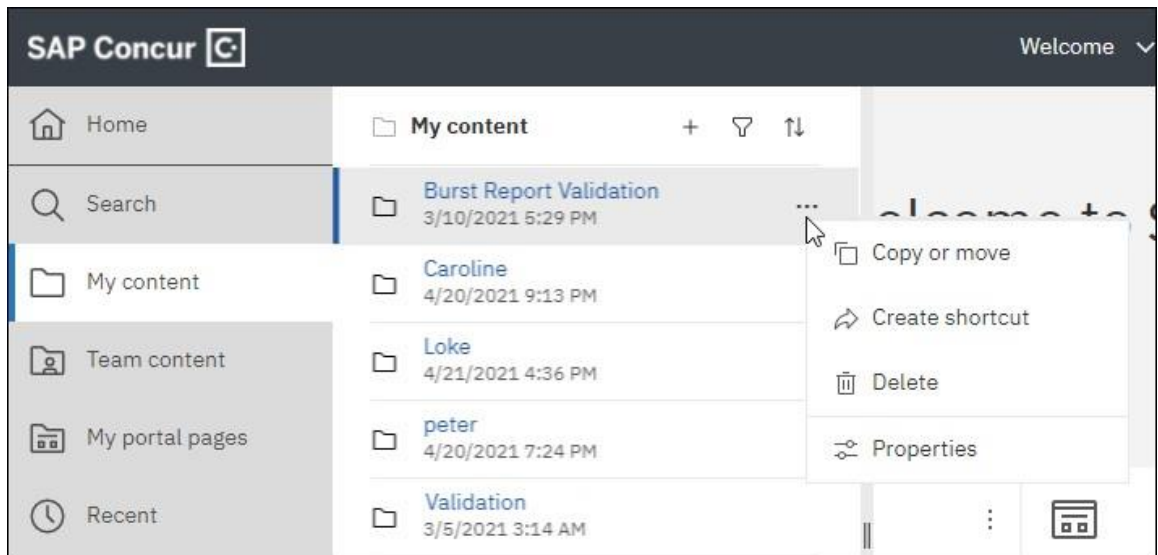


The options for managing individual folders, reports, and jobs are available on the **More** menu. To open the **More** menu, place your pointer over the individual folder, report, dashboard, or job to display the **More** icon, .

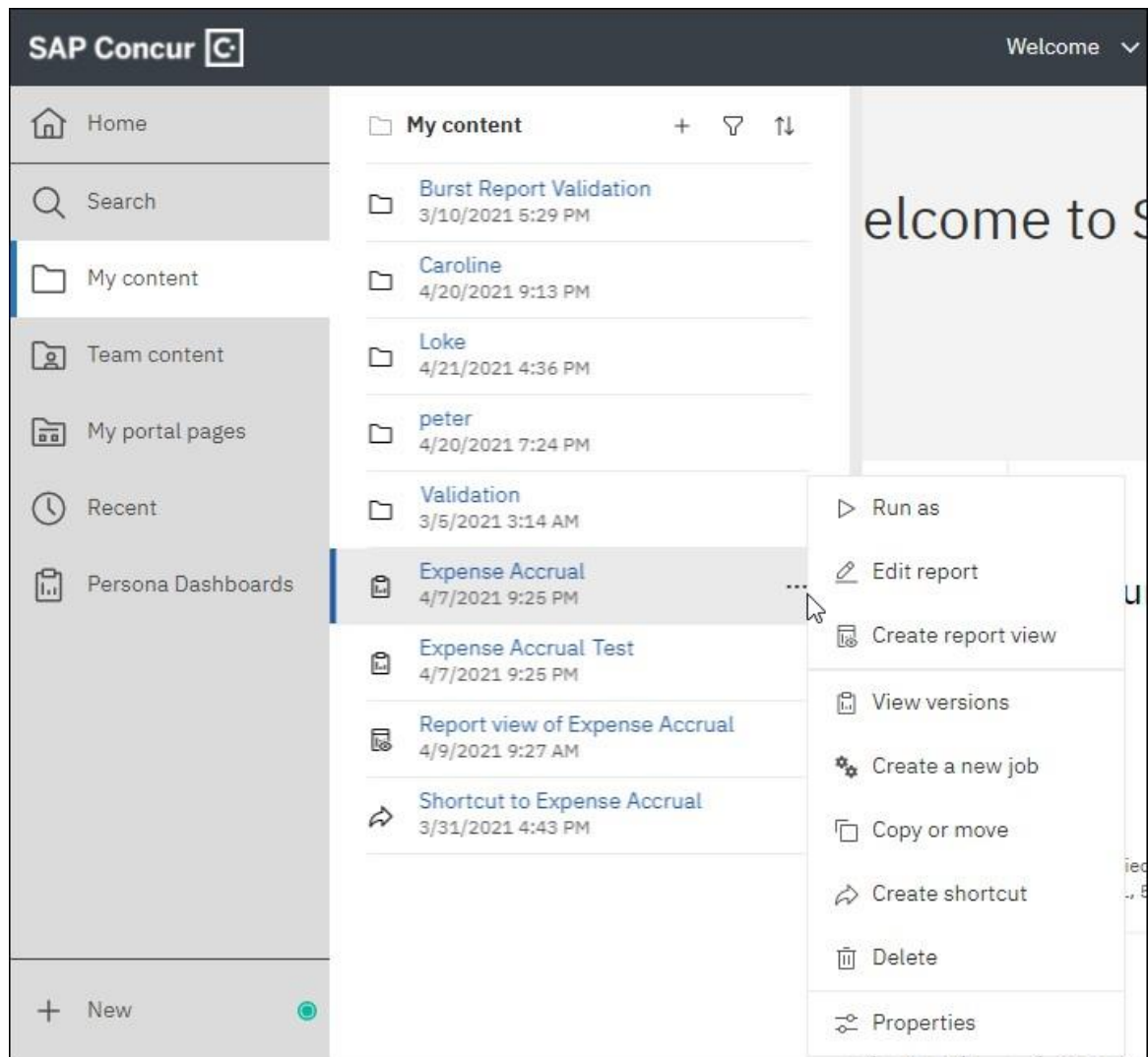


Click the **More** icon, , to open the **More** menu.

Example of the **More** menu for a folder:

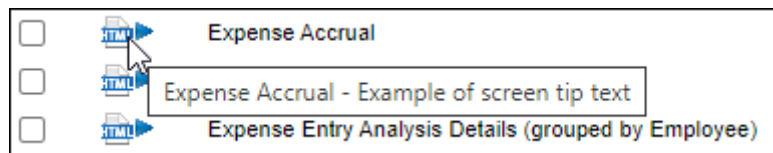


Example of the **More** menu for a report:

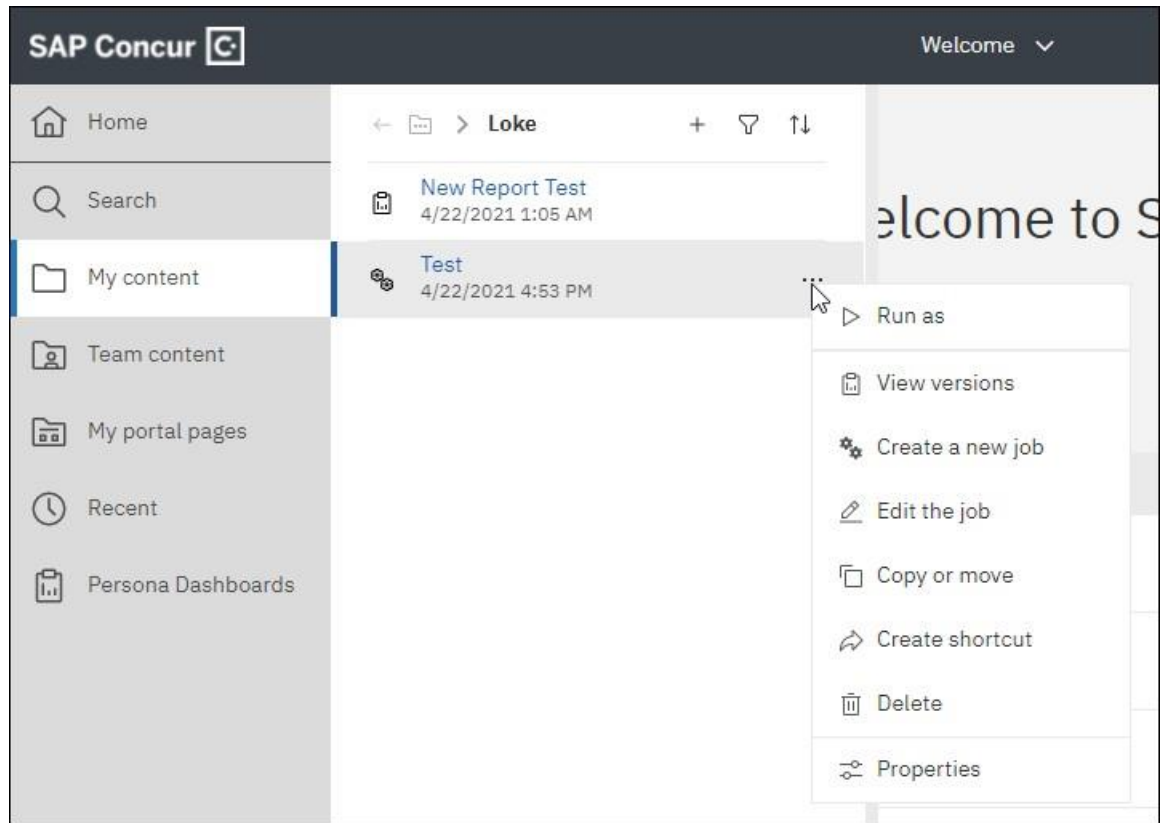


NOTE: The screen tip option that was available for reports in Cognos 10 is not available in Cognos 11.

In Cognos 10, the **Screen tip** field was located on the **General** tab on a report's **Set properties** page. The screen tip option allowed you to add a screen tip that was displayed next to the report name when you placed your pointer over the icon next to a report in the report list.



Example of the **More** menu for a job:



Section 3: Team Content (Formerly Public Folders)

In Cognos 11, the Public Folders feature is renamed to Team content, and the folders, and contents of the folders previously located in Public Folders are now located in Team content. The Team content feature is where content available to all Cognos users in your organization is stored, including the standard report catalog of dashboards and reports in the **Intelligence – Standard Reports** folders. A user's SAP Concur solutions' role and permission assignments determine what content in the **Team content** folder the user can access.

Cognos 10 UI

The Public Folders feature is accessed by clicking the **Public Folders** tab.

The screenshot shows the SAP Concur Cognos 10 UI interface. At the top, the SAP Concur logo is on the left, and a navigation bar contains 'Log Off', a search icon, a home icon, a user profile icon, and a 'Launch' dropdown menu. Below this is a tabbed interface with three tabs: 'Public Folders' (selected), 'My Folders', and 'Persona Dashboard'. The 'Public Folders' tab is active, displaying a toolbar with various icons for file operations and a pagination control showing 'Entries: 1 - 5'. Below the toolbar is a table listing the public folders.

<input type="checkbox"/>	Name	Modified	Actions
<input type="checkbox"/>	Analytics Anybiz (p015505375a4)	May 22, 2020 1:15:46 PM	More...
<input type="checkbox"/>	Concur Data Warehouse	June 10, 2020 12:32:35 PM	More...
<input type="checkbox"/>	Concur Historical Reporting Data	April 16, 2020 1:54:08 PM	More...
<input type="checkbox"/>	Dashboard Metrics	July 29, 2014 11:32:22 AM	More...
<input type="checkbox"/>	Intelligence - Standard Reports	January 29, 2018 1:45:15 PM	More...

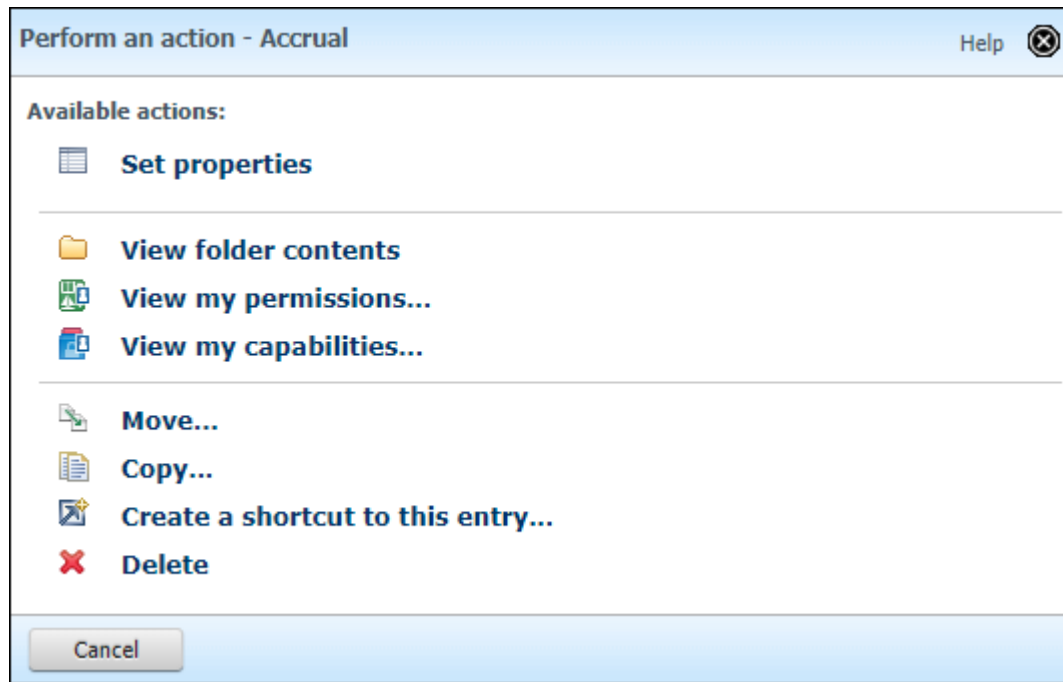
When you click one of the folders on the **Public Folders** tab, such as the **Duke University** or **Intelligence – Standard Reports** folder, the contents of the folder are displayed on the page.

The screenshot shows the SAP Concur interface. At the top, there is the SAP Concur logo and a 'Log Off' button. Below the logo, there are navigation tabs for 'Public Folders', 'My Folders', and 'Persona Dashboard'. The current view is 'Public Folders > Intelligence - Standard Reports'. A table lists various folders with their names, modification dates, and 'More...' action links.

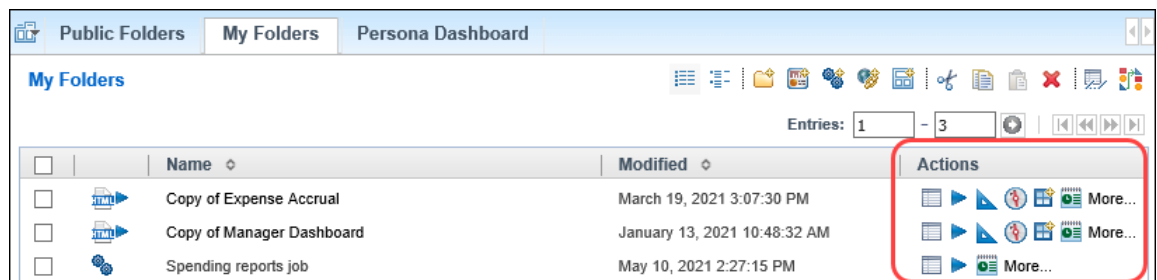
<input type="checkbox"/>	Name	Modified	Actions
<input type="checkbox"/>	Accrual	August 17, 2018 12:28:55 PM	More...
<input type="checkbox"/>	Administration	August 17, 2018 12:29:12 PM	More...
<input type="checkbox"/>	Audit	August 17, 2018 12:29:35 PM	More...
<input type="checkbox"/>	Carbon Footprint	August 17, 2018 12:30:03 PM	More...
<input type="checkbox"/>	Company Billed Cards	August 17, 2018 12:30:37 PM	More...
<input type="checkbox"/>	Compliance	November 14, 2018 5:11:09 PM	More...
<input type="checkbox"/>	E-Receipt	August 17, 2018 12:31:19 PM	More...
<input type="checkbox"/>	Expense Processing	August 17, 2018 12:31:46 PM	More...
<input type="checkbox"/>	Finance	August 17, 2018 12:32:06 PM	More...
<input type="checkbox"/>	Fraud	August 17, 2018 12:32:23 PM	More...
<input type="checkbox"/>	Invoice	January 15, 2019 3:26:47 PM	More...
<input type="checkbox"/>	Market Specific Reports	August 17, 2018 2:23:49 PM	More...
<input type="checkbox"/>	Meetings	August 17, 2018 12:33:37 PM	More...
<input type="checkbox"/>	Mobile Usage	May 4, 2020 5:04:54 PM	More...
<input type="checkbox"/>	Persona Dashboards	August 17, 2018 12:34:28 PM	More...
<input type="checkbox"/>	Premium Dashboards	January 15, 2019 4:22:33 PM	More...
<input type="checkbox"/>	Previous Report Versions	July 19, 2010 1:52:45 PM	More...
<input type="checkbox"/>	Report Samples	January 9, 2017 1:10:17 PM	More...
<input type="checkbox"/>	Spending	August 17, 2018 12:37:44 PM	More...
<input type="checkbox"/>	Tax	August 17, 2018 12:38:03 PM	More...
<input type="checkbox"/>	Travel Request	August 17, 2018 12:38:29 PM	More...
<input type="checkbox"/>	TripLink	February 25, 2019 12:41:19 PM	More...
<input type="checkbox"/>	Trips	August 17, 2018 12:39:04 PM	More...
<input type="checkbox"/>	Vendor	August 17, 2018 12:39:26 PM	More...

For folders, the **Actions** column contains the **More** link for managing folders.

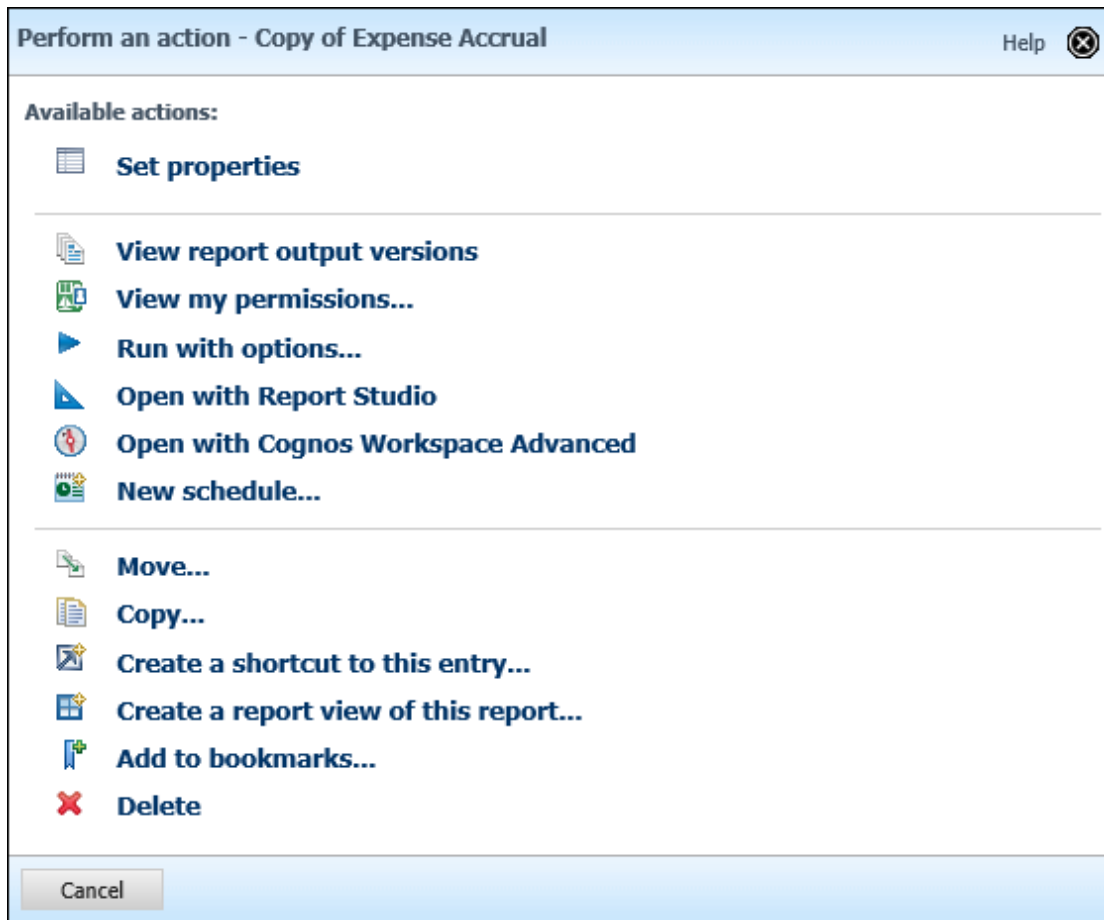
Clicking the **More** link opens the **Perform and action** page for the folder.



For reports, the **Actions** column contains a number of icons for managing and running individual reports, including the **Set Properties** icon and **More** link, as well as icons for viewing output versions, running the report, opening the report in Report Studio, opening the report with Cognos Workspace, creating a report view, and scheduling the report.

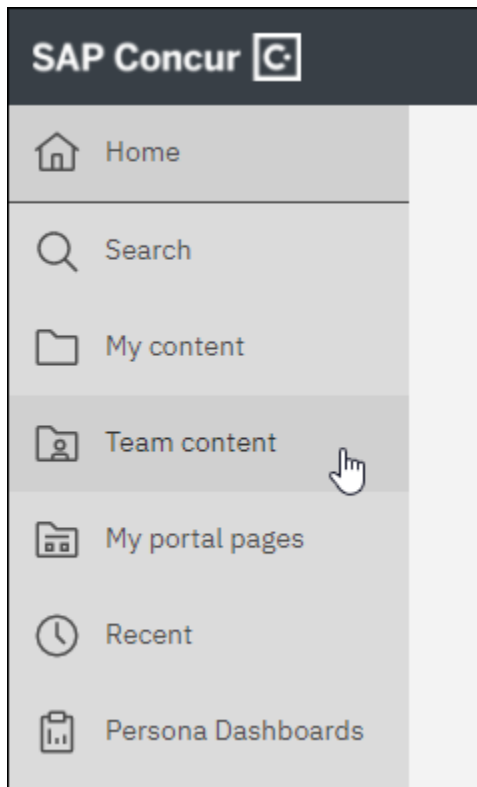


Example of the **Perform an action** page for a report:

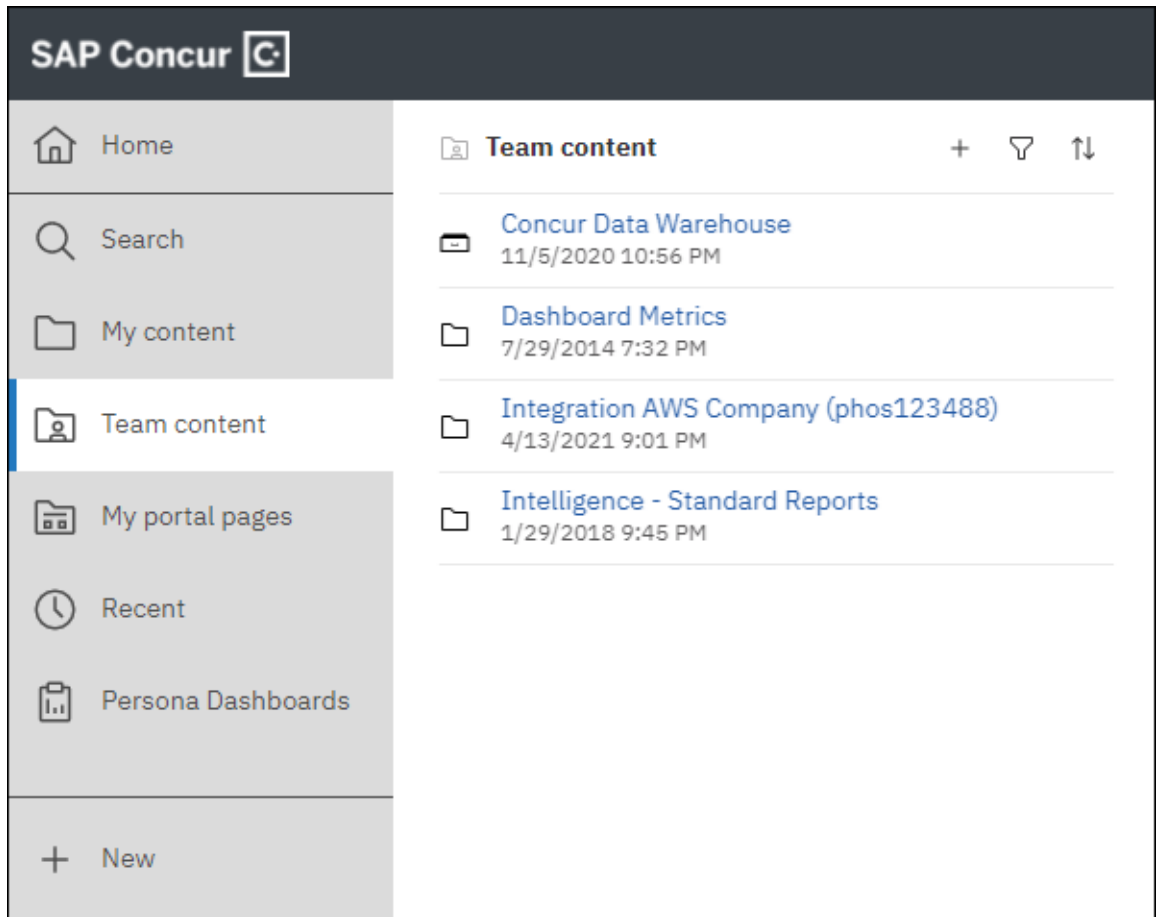


Cognos 11 UI

You can access the Team content feature from the left navigation pane.



When you click Team content, the contents of the **Team content** folder are displayed to the right of the left navigation pane.




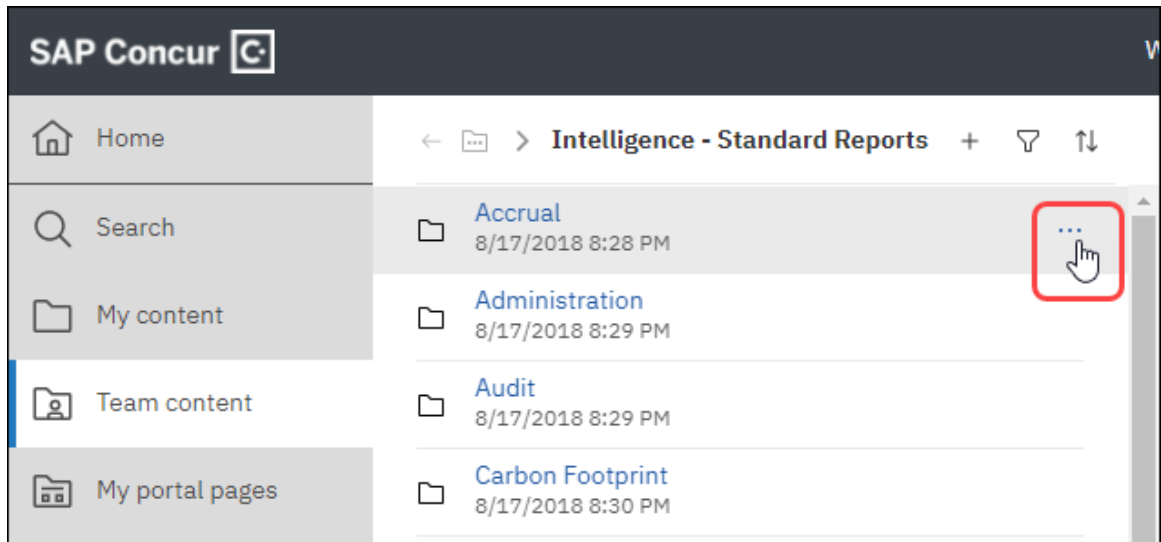
When you click one of the folders in the **Team content** list, such as the **Duke University** or **Intelligence – Standard Reports** folder, the contents of the folder are displayed to the right of the left navigation pane.

The screenshot displays the SAP Concur user interface. On the left is a navigation pane with the following items: Home, Search, My content, Team content (highlighted with a blue bar), My portal pages, Recent, and Persona Dashboards. At the bottom of the navigation pane is a '+ New' button. The main content area is titled 'Intelligence - Standard Reports' and contains a list of folders, each with a folder icon and a timestamp:

- Accrual (8/17/2018 8:28 PM)
- Administration (8/17/2018 8:29 PM)
- Audit (8/17/2018 8:29 PM)
- Carbon Footprint (8/17/2018 8:30 PM)
- Company Billed Cards (8/17/2018 8:30 PM)
- Compliance (11/15/2018 1:11 AM)
- E-Receipt (1/3/2020 8:39 PM)
- Expense Processing (8/17/2018 8:31 PM)
- Finance (8/17/2018 8:32 PM)
- Fraud (8/17/2018 8:32 PM)
- Invoice (1/15/2019 11:26 PM)
- Market Specific Reports (8/17/2018 10:23 PM)
- Meetings (8/17/2018 8:33 PM)
- Mobile Usage (5/5/2020 1:04 AM)

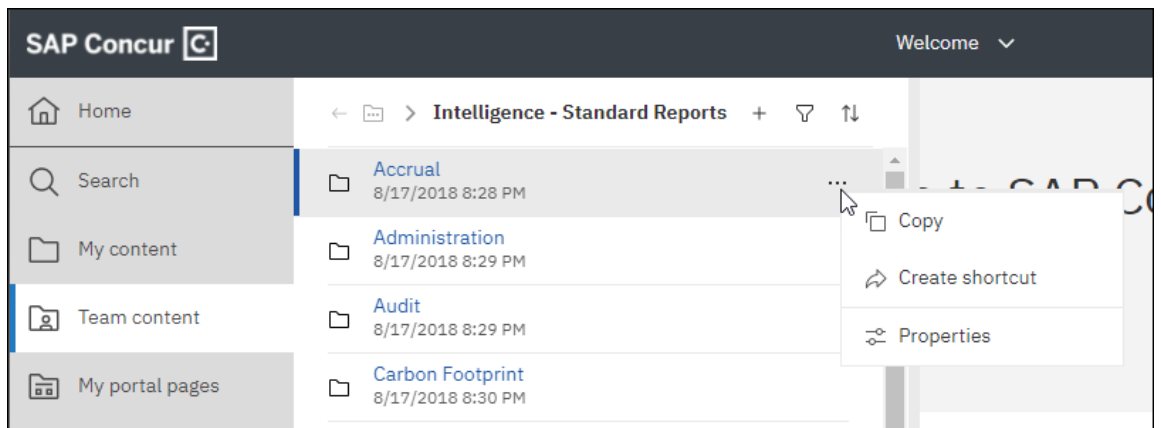
The folders, reports, and dashboards available in the **Duke University** and **Intelligence – Standard Reports** folders in Cognos 10 are the same folders, reports, and dashboards available in Cognos 11. No changes were made to these folders, reports, or dashboards with the Cognos version 11 update.

The options for managing individual folders and reports are available on the **More** menu. To view the **More** icon, , place your pointer over the individual folder or report.

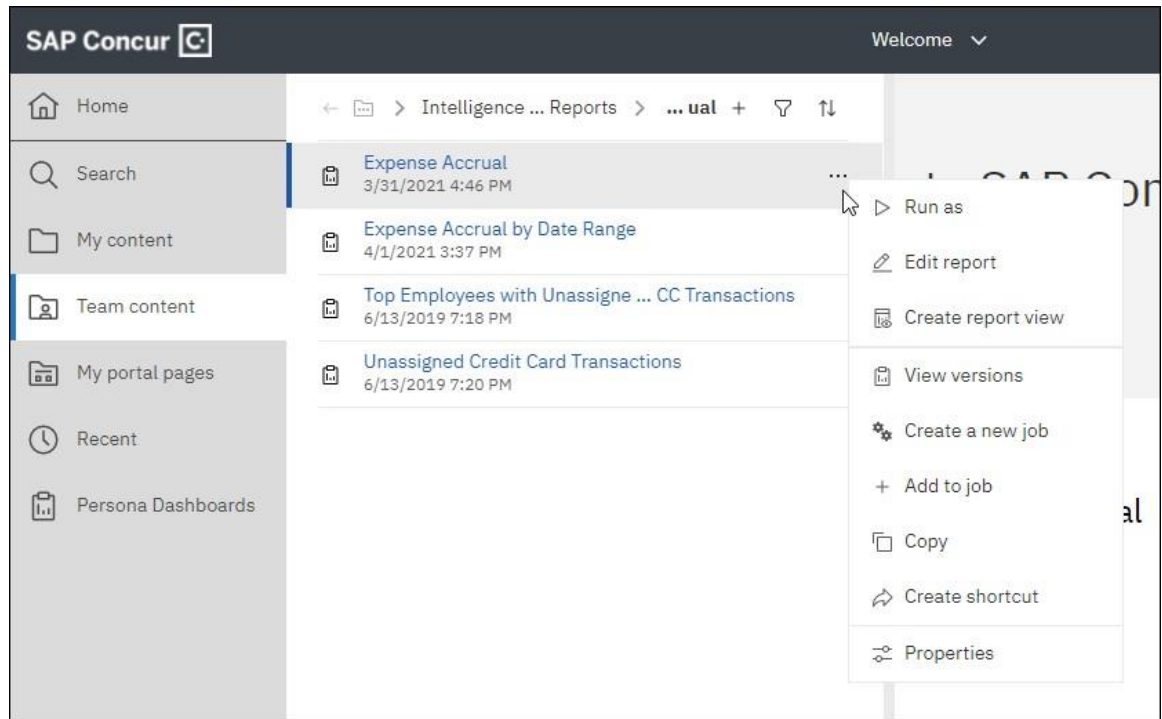


Click the **More** icon, , to open the **More** menu.

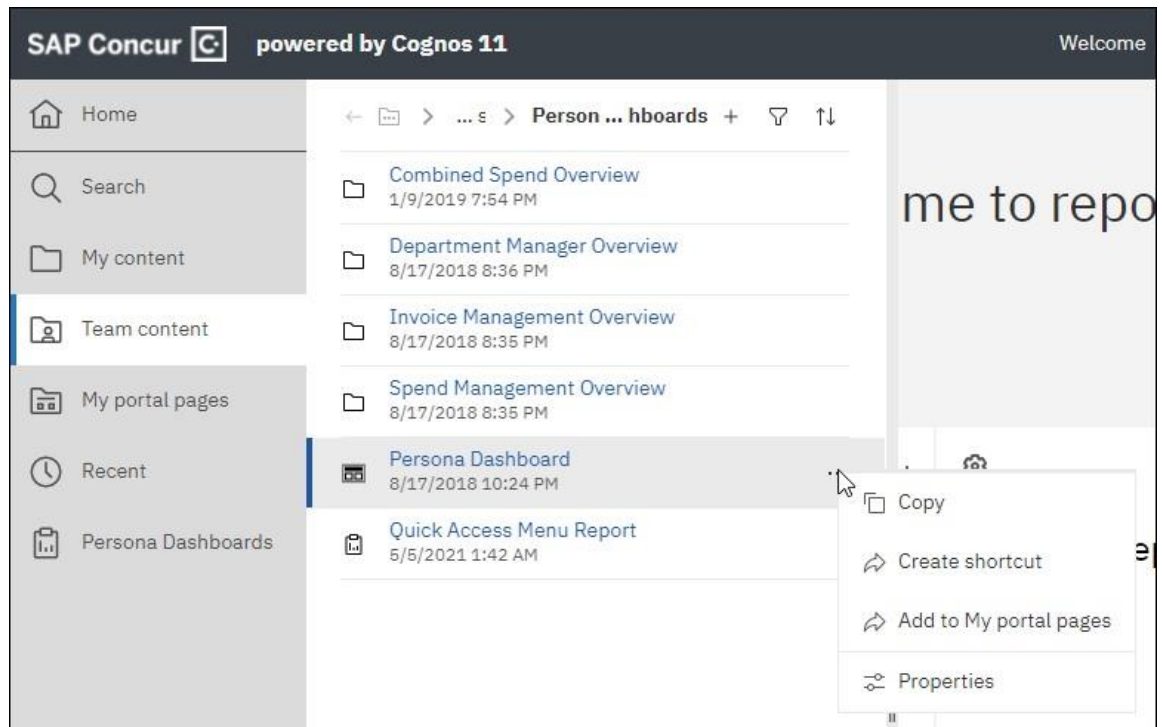
Example of the **More** menu for a folder:



Example of the **More** menu for a report:



Example of the **More** menu for a dashboard:



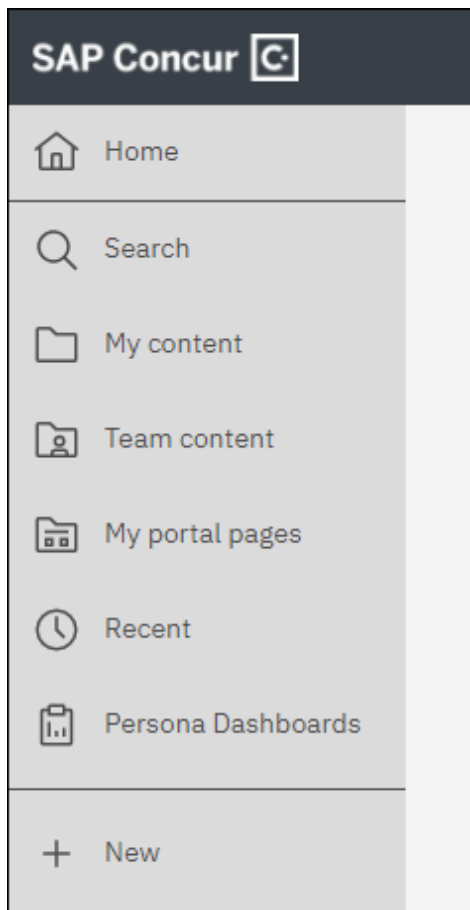
Section 4: Navigation

With the Cognos version 11 update, the feature, folder, report, and dashboard navigation now provides a more streamlined user experience, including a linked navigation folder path.

Left Navigation Bar

Most of the navigation in Cognos 11 starts from the left navigation bar.

NOTE: The width of your browser window and what you currently have displayed in the main view determines whether the left navigation pane displays the icons along with the icon name or whether the pane displays the icons only.

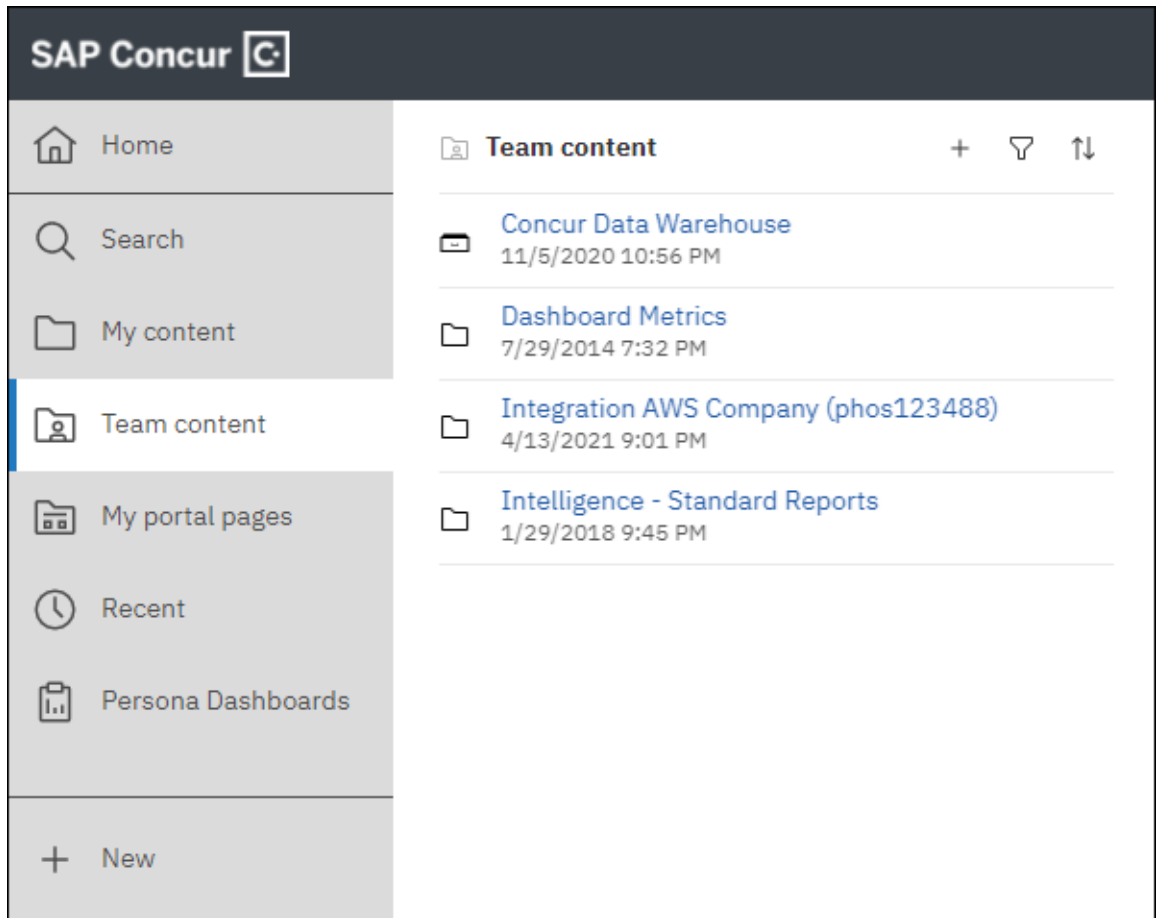


Navigating Folders

Some features on the left navigation bar open a folder list, such as My content and Team content.

When you click **My content** or **Team content**, the **My content** or **Team content** folder list opens to the right of the left navigation pane.

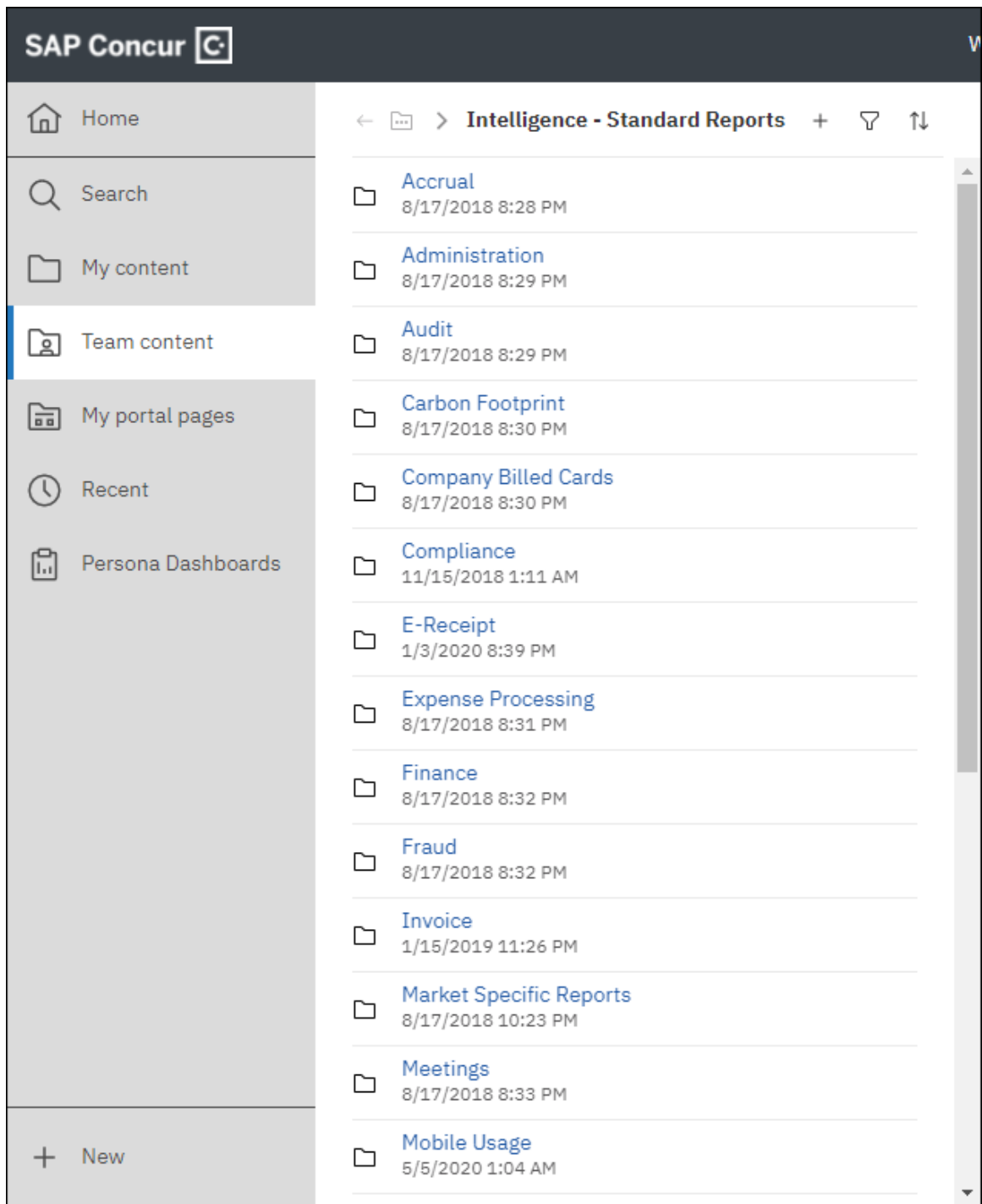
In this example, the **Team content** folder list is opened:



The name of the top-level folder, **Team content**, is displayed at the top of the folder list.

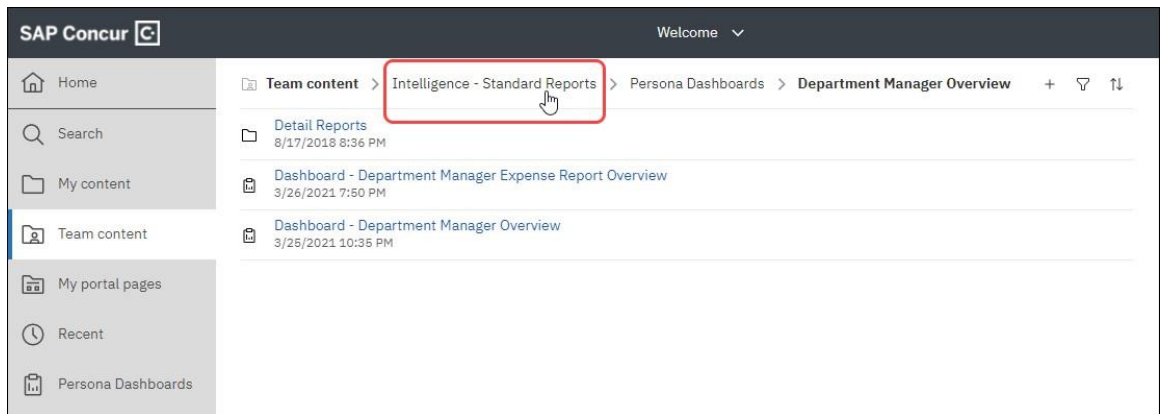
To open a folder in the list, click the folder you want to open. The contents of the folder are now listed to the right of the left navigation bar.



In this example the **Intelligence – Standard Reports** folder is opened.

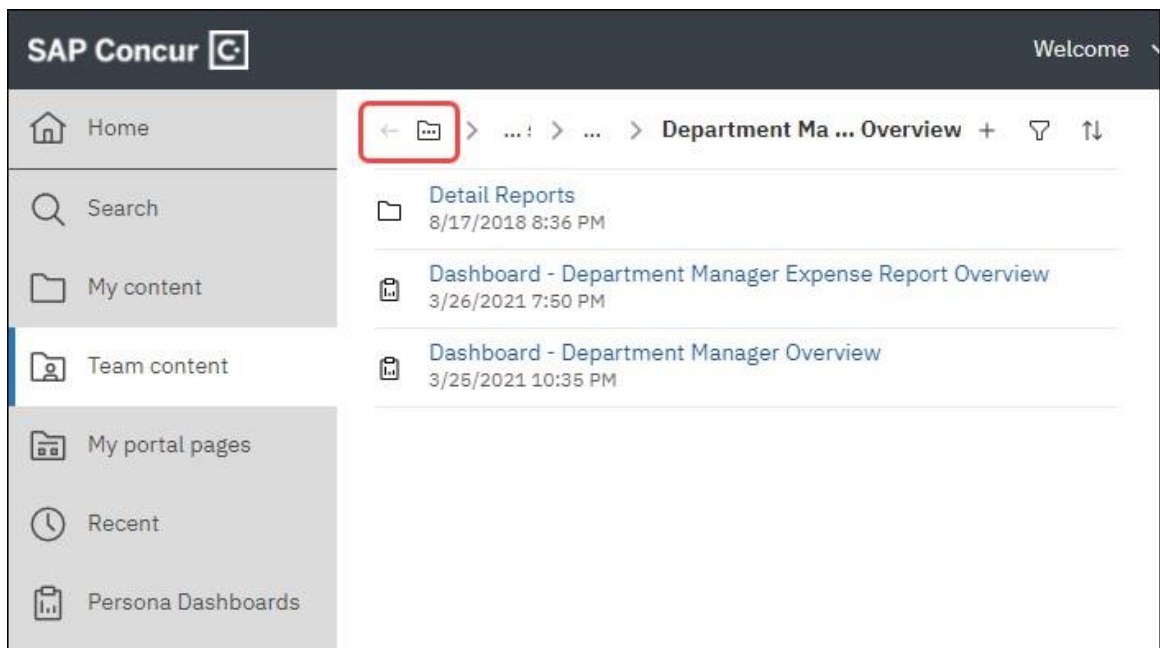




At the top of the folder list, the name of the folder you opened along with the folder path are displayed. You can click any folder in the path to navigate directly to that folder.


In this example, the **Department Manager Overview** folder is opened. If you click *Intelligence – Standard Reports* in the folder path, the **Intelligence – Standard Reports** folder will open.

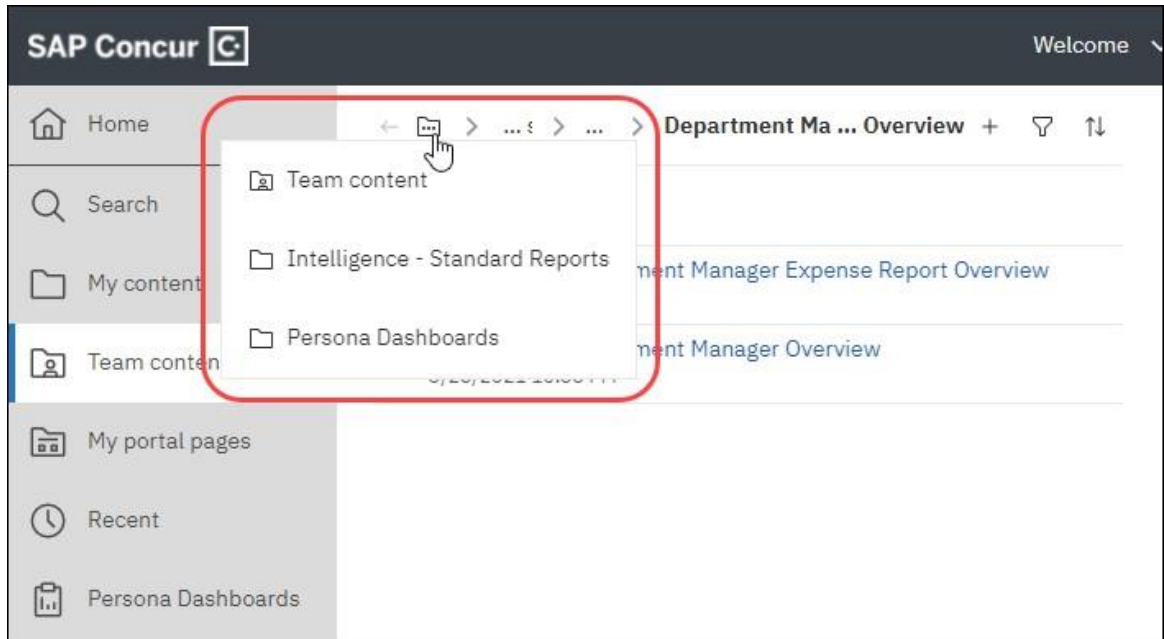


If the full folder path cannot be displayed, the **Previous** icon, , and the **Collapsed items** icon, , are displayed to the left of the folder path.



Clicking the **Previous** icon, , will navigate you back one folder level. So, if you clicked **Team content** in the left navigation pane and then clicked the **Intelligence – Standard Reports** folder, when you click the **Previous** icon, , you are returned to the **Team content** folder.




Clicking the **Collapsed Items** icon, , displays the current folder hierarchy. You can navigate to any point in this folder hierarchy by clicking the applicable folder in the hierarchy.

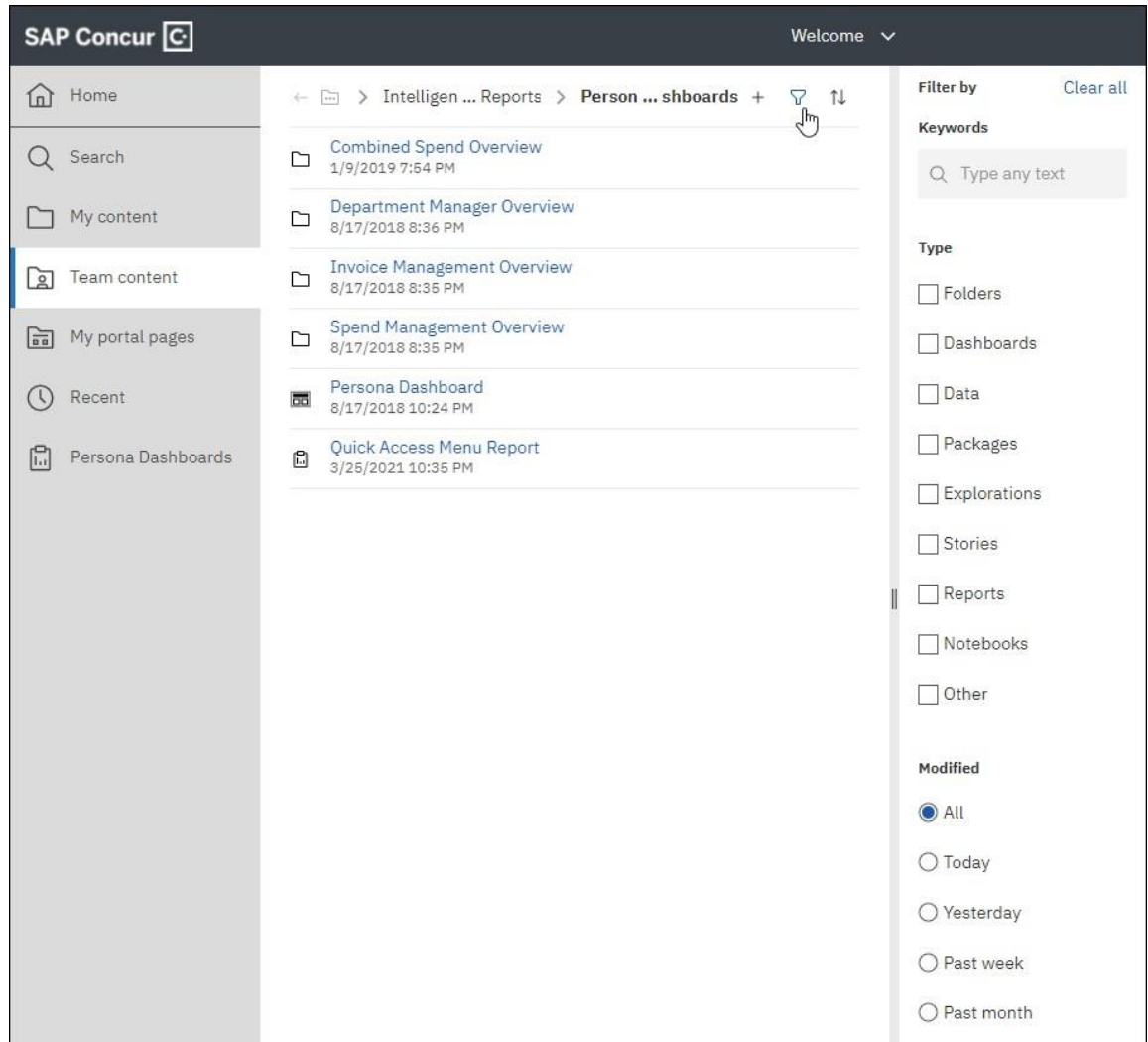


When you navigate to a specific folder in Cognos 11, Cognos 11 will retain your place in the folder hierarchy for the current Cognos session even when you leave the current view.

For example, during your Cognos session, if you are viewing reports in the **Accrual** folder under **Intelligence – Standard Reports** in Team content and then open My content, when you return to Team content, the **Accrual** folder will open.

Filter By and Sort Panes

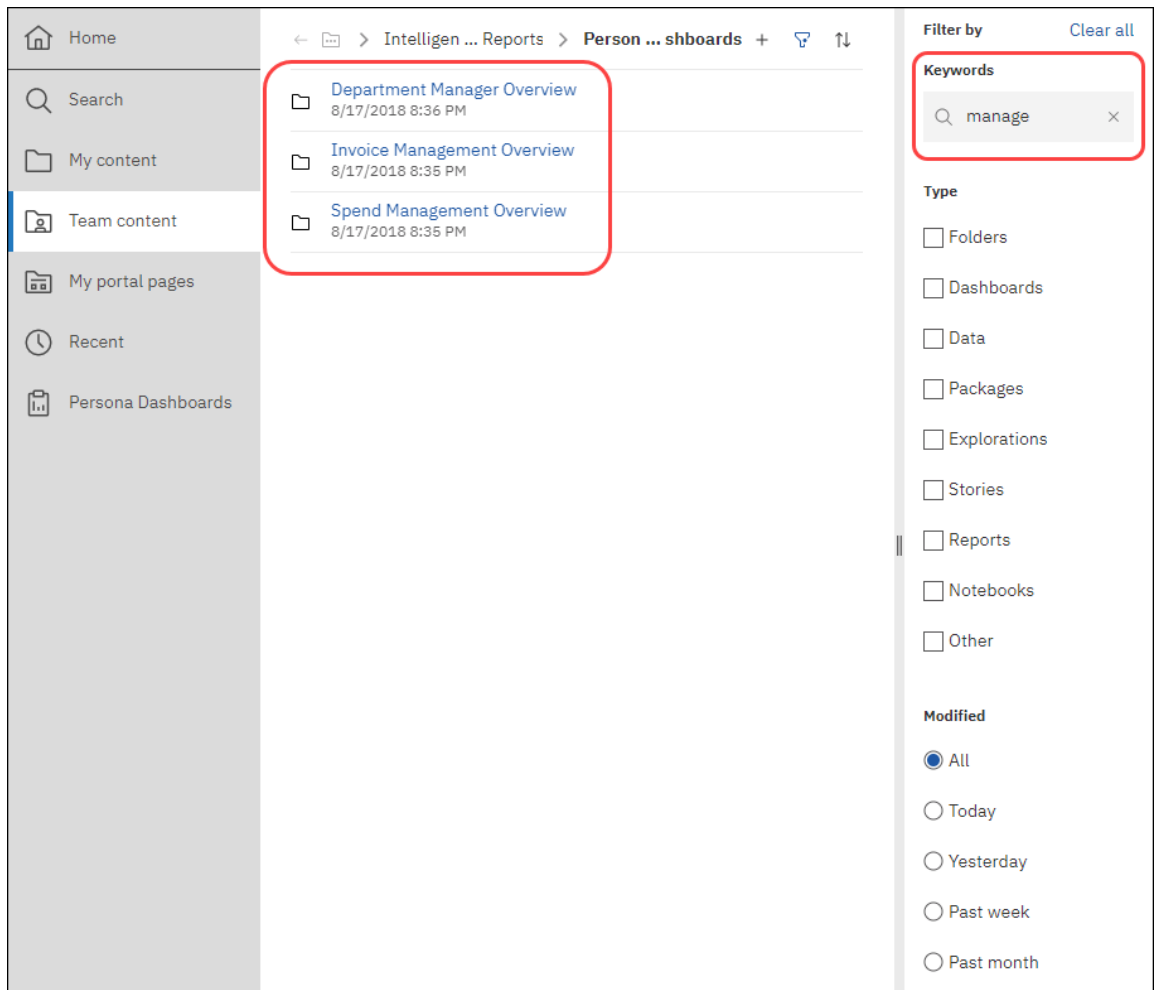
To the right of the folder name and path is the **Filter by** icon, , and the **Sort** icon, . Clicking the **Filter by** icon, , opens the **Filter by** pane to the right of the folder list.



The screenshot displays the SAP Concur interface. The top navigation bar includes the SAP Concur logo and a 'Welcome' dropdown. The left sidebar contains navigation options: Home, Search, My content, Team content (selected), My portal pages, Recent, and Persona Dashboards. The main content area shows a breadcrumb path: 'Intelligen ... Reports > Person ... shboards +'. Below this, a list of items is displayed, including 'Combined Spend Overview', 'Department Manager Overview', 'Invoice Management Overview', 'Spend Management Overview', 'Persona Dashboard', and 'Quick Access Menu Report'. To the right, the 'Filter by' pane is open, featuring a 'Clear all' link, a 'Keywords' search box, and a 'Type' section with checkboxes for Folders, Dashboards, Data, Packages, Explorations, Stories, Reports, Notebooks, and Other. The 'Modified' section includes radio buttons for All (selected), Today, Yesterday, Past week, and Past month.

As you enter your filter criteria, the contents of the folder are automatically filtered.

For example, the **Persona Dashboards** folder is open. Entering *manage* in the **Keywords** field filters the list to only display the items containing *manage* in the name. In this example, only three folders in the list contain *manage* in their name.

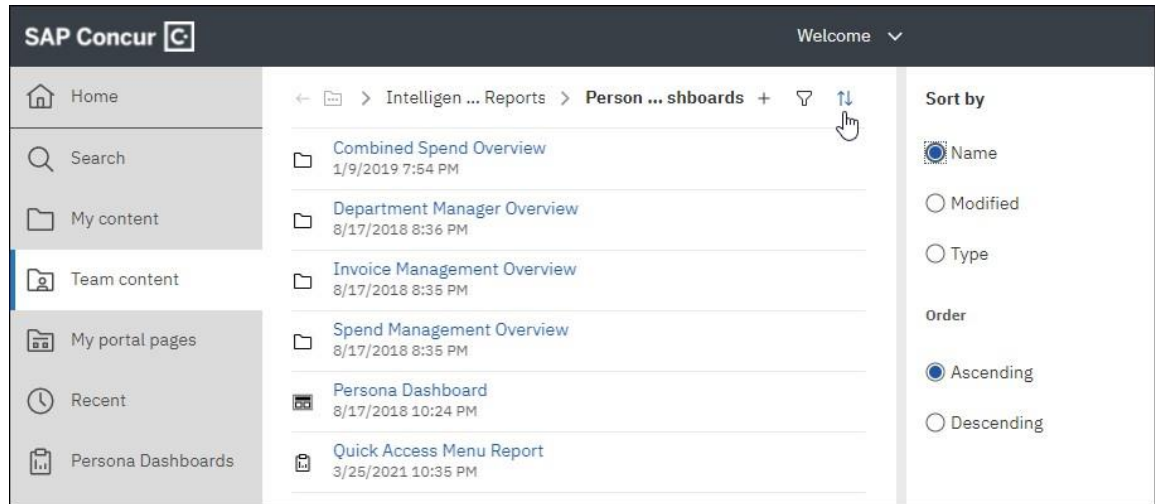


The filter criteria will be applied to any folder you navigate to. For example, if you navigate to the previous folder, the filter criteria will also be applied to that folder. The filter criteria are retained for the current Cognos session until your clear or edit the filter criteria, even if you close the **Filter by** pane.

A dot on the **Filter by** icon, , indicates that a filter is currently being applied.

To close the **Filter by** pane, click the **Filter by** icon, , again.

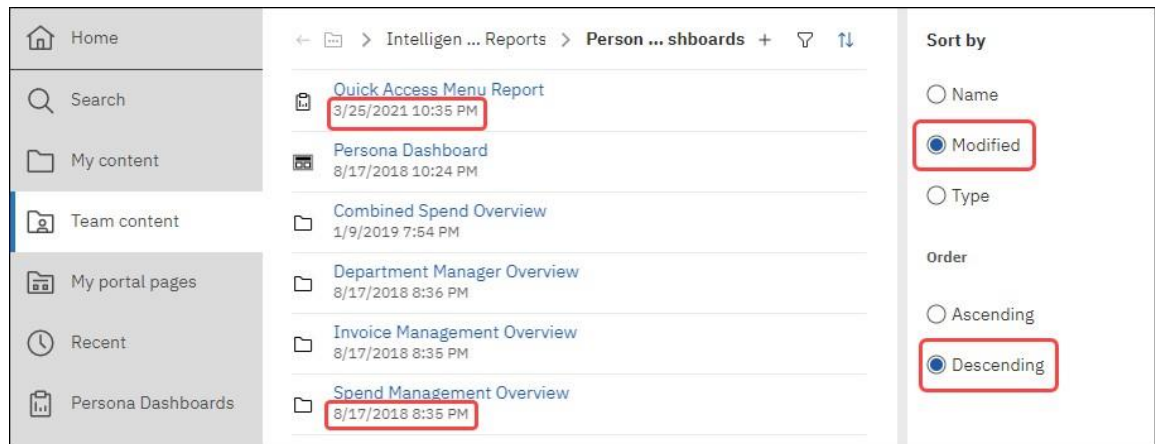
Clicking the **Sort** icon, , opens the **Sort by** pane to the right of the folder list.




By default, the **Name** and **Ascending** options are selected in the **Sort by** pane.

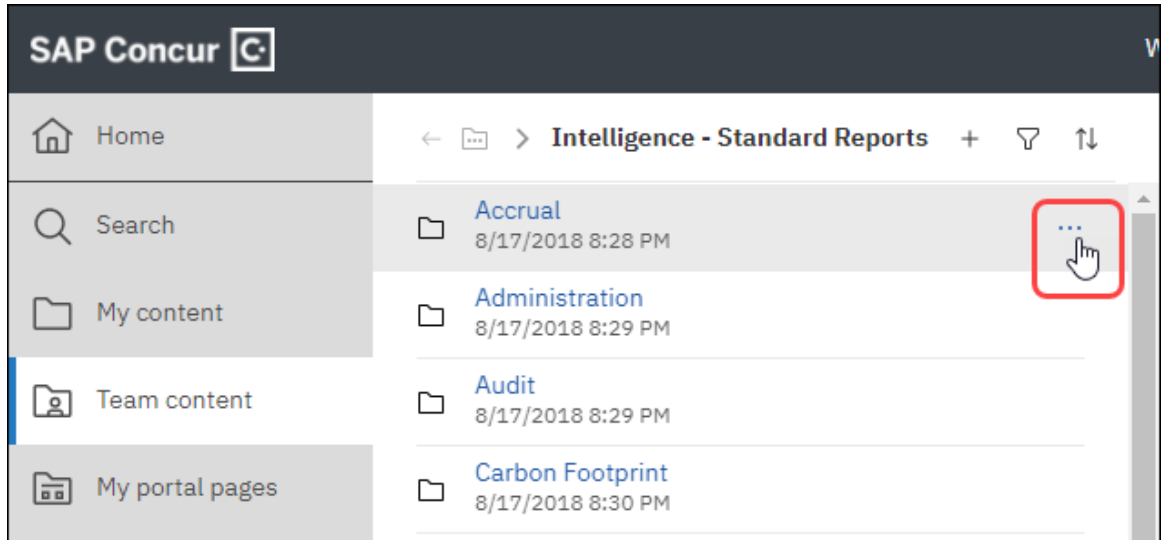
As you select the sort options, the contents of the folder are automatically sorted.

For example, the **Persona Dashboards** folder is open. Selecting the **Modified** and **Descending** options sorts the contents of the folder by the last modified date in descending order, with the most recently modified item at the top of the list and the item with the oldest last modified date at the bottom of the list.



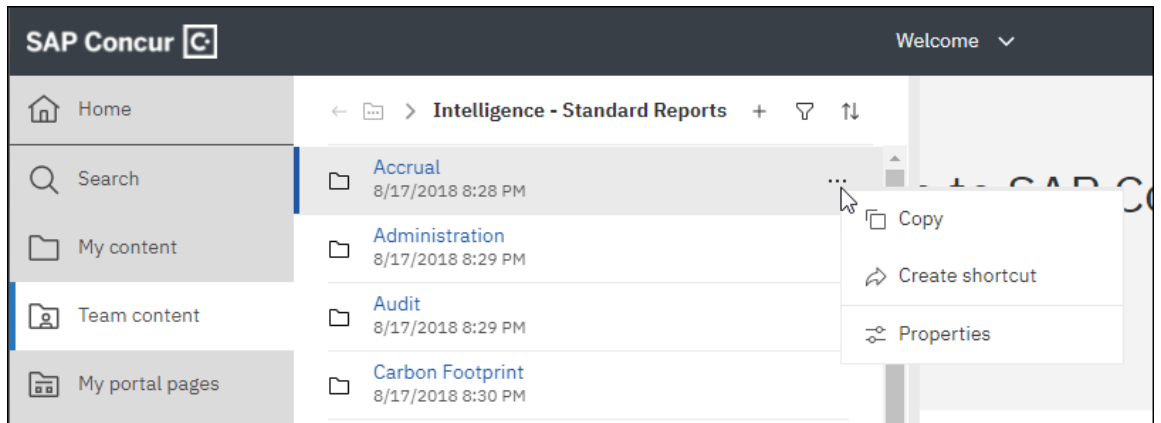
More Menu

For folders, reports, dashboards, and jobs in a folder list, the **More** menu is available. The options for managing individual folders, reports, dashboards, and jobs are available on the **More** menu. To open the **More** menu, place your pointer over the individual folder, report, or job in the folder list to display the **More** icon, .



Click the **More** icon, , to open the **More** menu.

Example of the **More** menu for a folder in Team content:



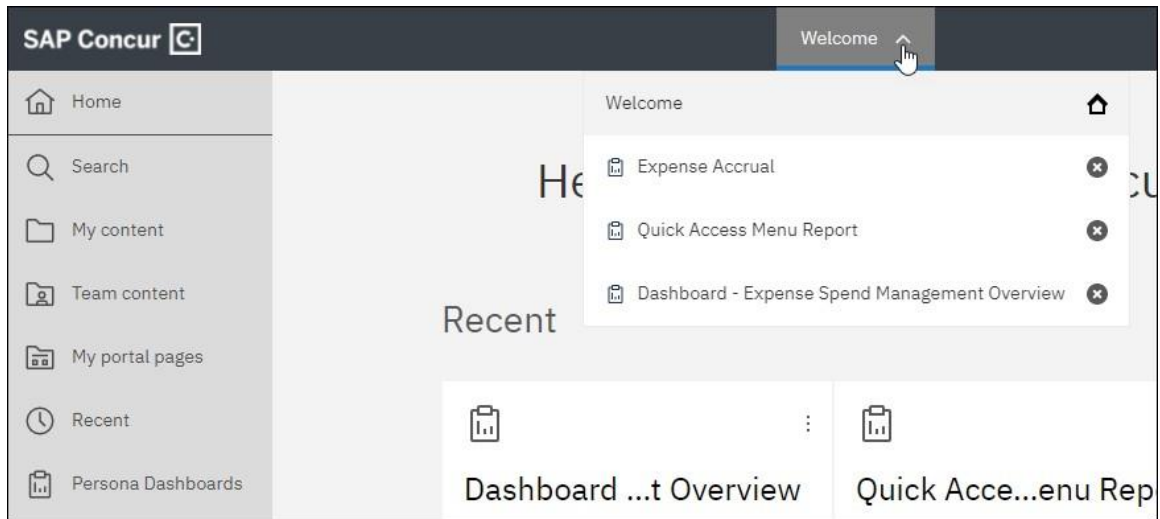
Recently Viewed List on the Top Navigation Bar

The recently viewed list on the top navigation bar provides a list of the recently viewed pages, reports, jobs, or dashboards for the current Cognos session. You can use the list to quickly navigate back to something you recently viewed.

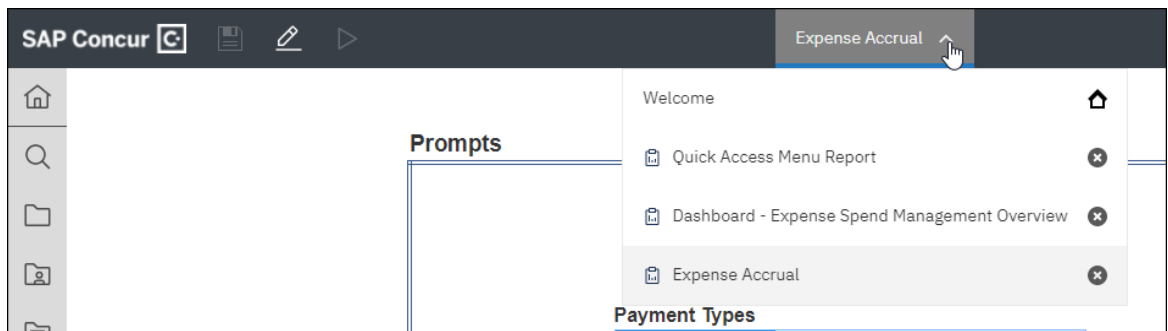
The name of the recently viewed list on the top navigation bar displays the name of the page currently viewed. For example, on the default Home page, the list displays *Welcome*, if you are viewing the Expense Accrual report, the list displays *Expense Accrual*.

The recently viewed list on the top navigation bar is cleared after each Cognos session.


Example of the recently viewed list when viewing the default Home page:



Example of the recently viewed list when viewing the Expense Accrual report:



Recent

The **Recently viewed** list is displayed when you click the **Recent** icon, , on the left navigation pane and the **Recent** list displayed on the default Home page, displays the last 20 pages, reports, jobs, and/or dashboards viewed by the user. Unlike the recently viewed list on the top navigation bar, the contents of the **Recently viewed** and **Recent** lists carry over from previous Cognos sessions. The recently viewed list on the top navigation bar is cleared after each Cognos session.

The list of recently viewed pages, reports, dashboards, and/or jobs displayed in the **Recently viewed** list is the same list that is displayed in the **Recent** list on the default Home page. Cognos 11 provides two different ways to access this list.

Example of the **Recently viewed** list:

The screenshot displays the SAP Concur user interface. On the left is a navigation sidebar with the following items: Home, Search, My content, Team content, My portal pages, Recent (highlighted with a blue bar), Persona Dashboards, and New. The main content area is titled 'Recently viewed' and contains a scrollable list of items. Each item includes a document icon, a title, and a breadcrumb trail. The items listed are: Expense Accrual (Team content > Intelligenc ... Reports > Accrual), Dashboard - Expense Spend ... Overview (Team content > Intelli ... Management Overview), Quick Access Menu Report (Team content > Intelli ... > Persona Dashboards), Expense Accrual (My content), Test (My content > Loke), New Report Test (My content > Lokesh M), Report view of Expense ... by Employee) (My content > peter), Concur Dashboard (Team content > Dashboard Metrics), Persona Dashboard (Team content > Intelli ... > Persona Dashboards), Expense Entry Analysis (Team content > Intellig ... > Expense Processing), Test (My content > Caroline), and Report view of Expen ... by Expense Type) (My content > peter).

Example of the **Recent** list on the default Home page:

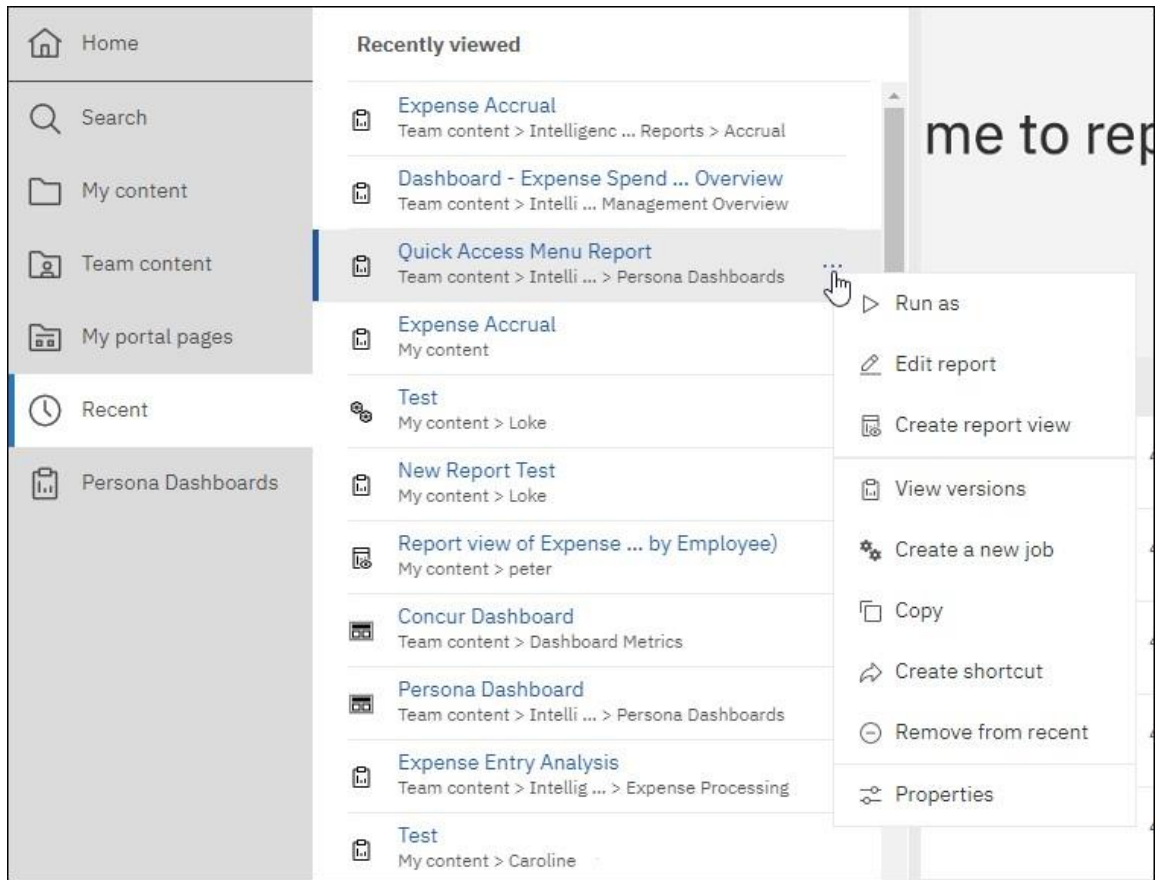
The screenshot shows the SAP Concur Home page. The top navigation bar includes the SAP Concur logo, a 'Welcome' dropdown, and a menu icon. The left sidebar contains navigation options: Home, Search, My content, Team content, My portal pages, Recent (highlighted), and Persona Dashboards. The main content area displays a 'Hello. Welcome to reporting for SAP Concur solution' message. Below this is a 'Recent' list widget with a table of items. The table has columns for Name, Type, and Last modified. The items listed are: 'Report View of Expense Su...' (report view), 'DV Job' (JOB), 'Invisible Spend Trend Anal...' (report), 'Quick Access Menu Report' (report), and 'Employee Details' (report). Each item has a 'More' icon (three dots) in the top right corner of the widget.

Name	Type	Last modified
Report View of Expense Su...	report view	8/23/2020, 4:24 PM
DV Job	JOB	8/23/2020, 4:24 PM
Invisible Spend Trend Anal...	report	8/23/2020, 4:24 PM
Quick Access Menu Report	report	8/23/2020, 4:24 PM
Employee Details	report	8/21/2020, 9:50 AM

Regardless of whether you are viewing the **Recently viewed** list from the left navigation bar or the **Recent** list on the default Home page, the **More** menu is available for each of the items in the list, just like if you were viewing the items in My content or Team content.

Placing your pointer on the item displays the **More** icon, . Clicking the **More** icon, , opens the **More** menu for the item.

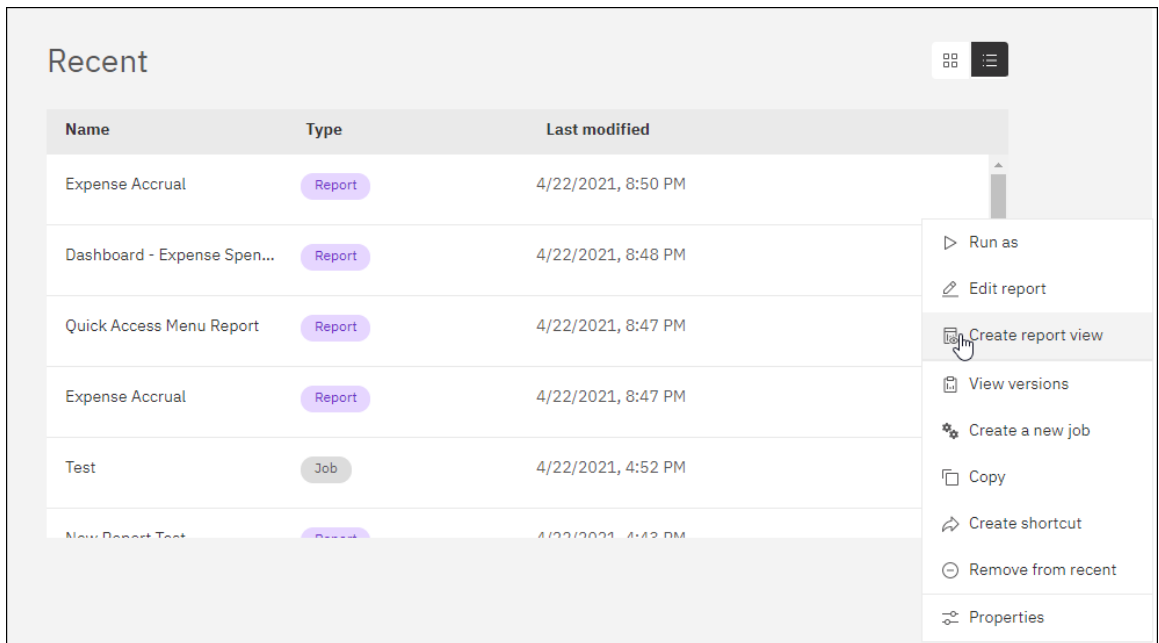
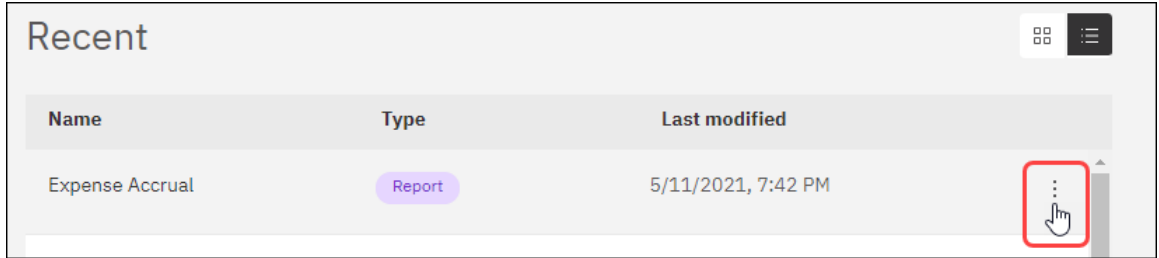
Example of the **More** menu from the **Recently viewed** list:



Example of the **More** menu from the **Recent** list on the default Home page:



NOTE: The orientation of the **More** icon, , on the Home page is vertical instead of horizontal.



Section 5: Search

In Cognos 11, you can globally search the **My content** and **Team content** folders for any folder, report, dashboard, or job that you have access to. The search results can be filtered by object type (such as folder, report, or dashboard).


Searches can be saved to help save time when you need to re-run the same search.

In Cognos 11, you can also search the data model.

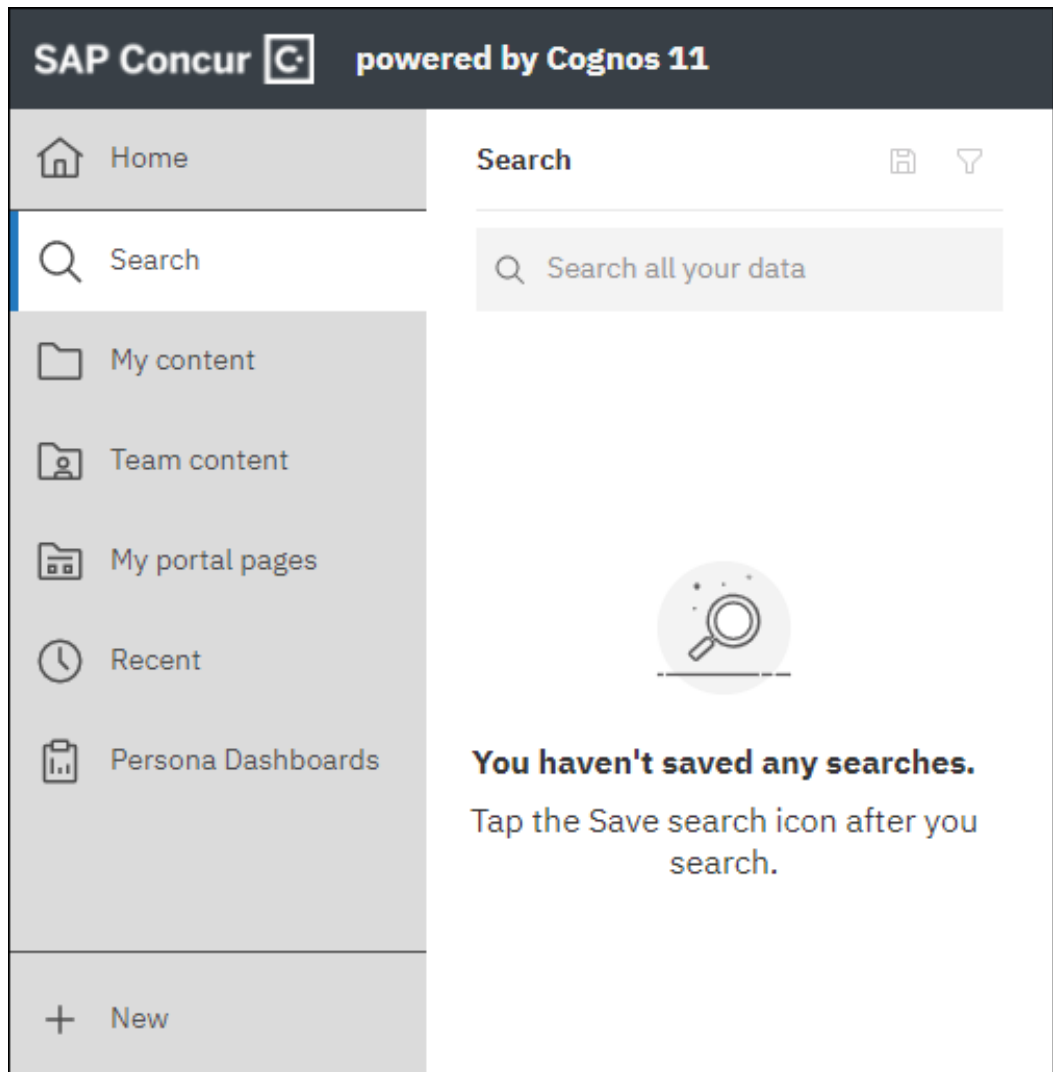


For more information about searching the data model, refer to the [Report \(Formerly Report Studio\)](#) section in this guide.

▶ **To search the My content and Team content folders:**

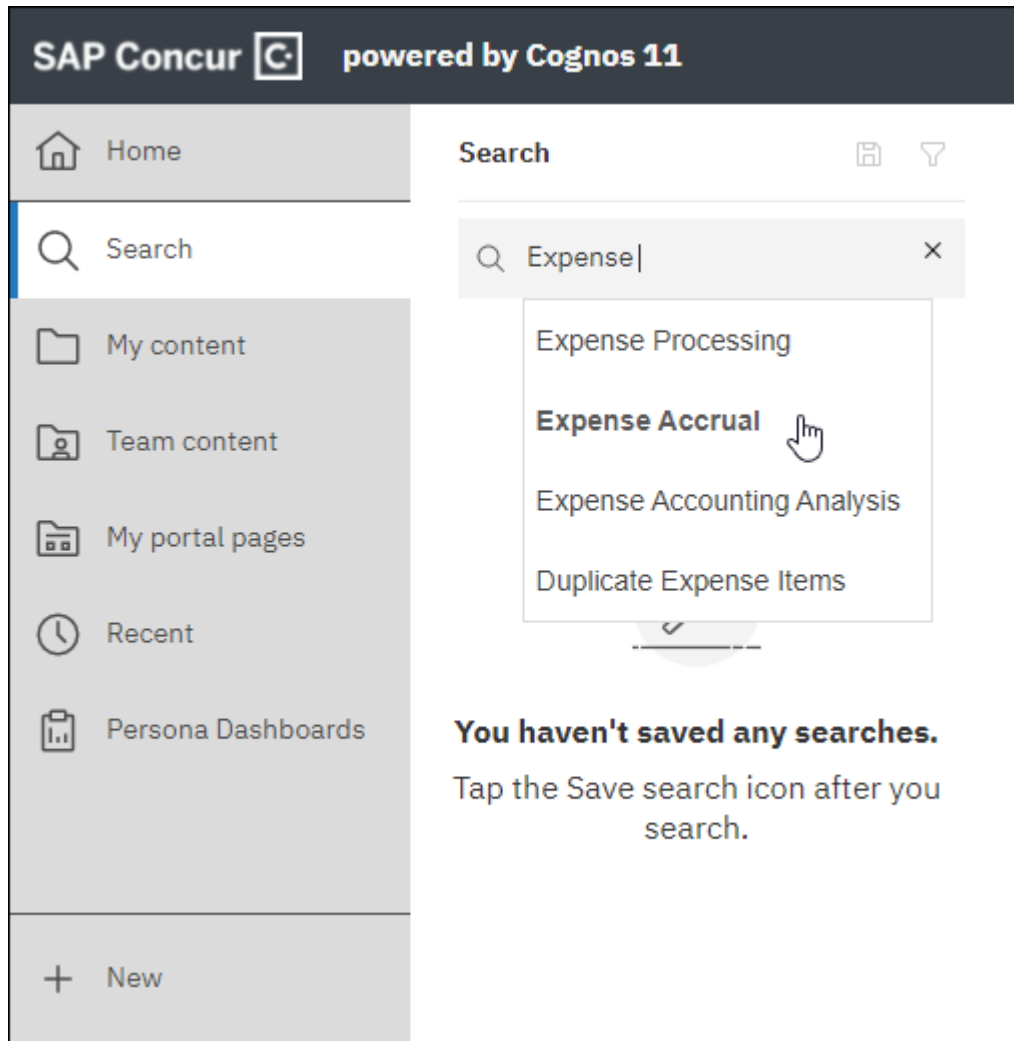
1. Click **Search**, , in the left navigation pane.

The **Search** pane opens to the right of the left navigation pane.



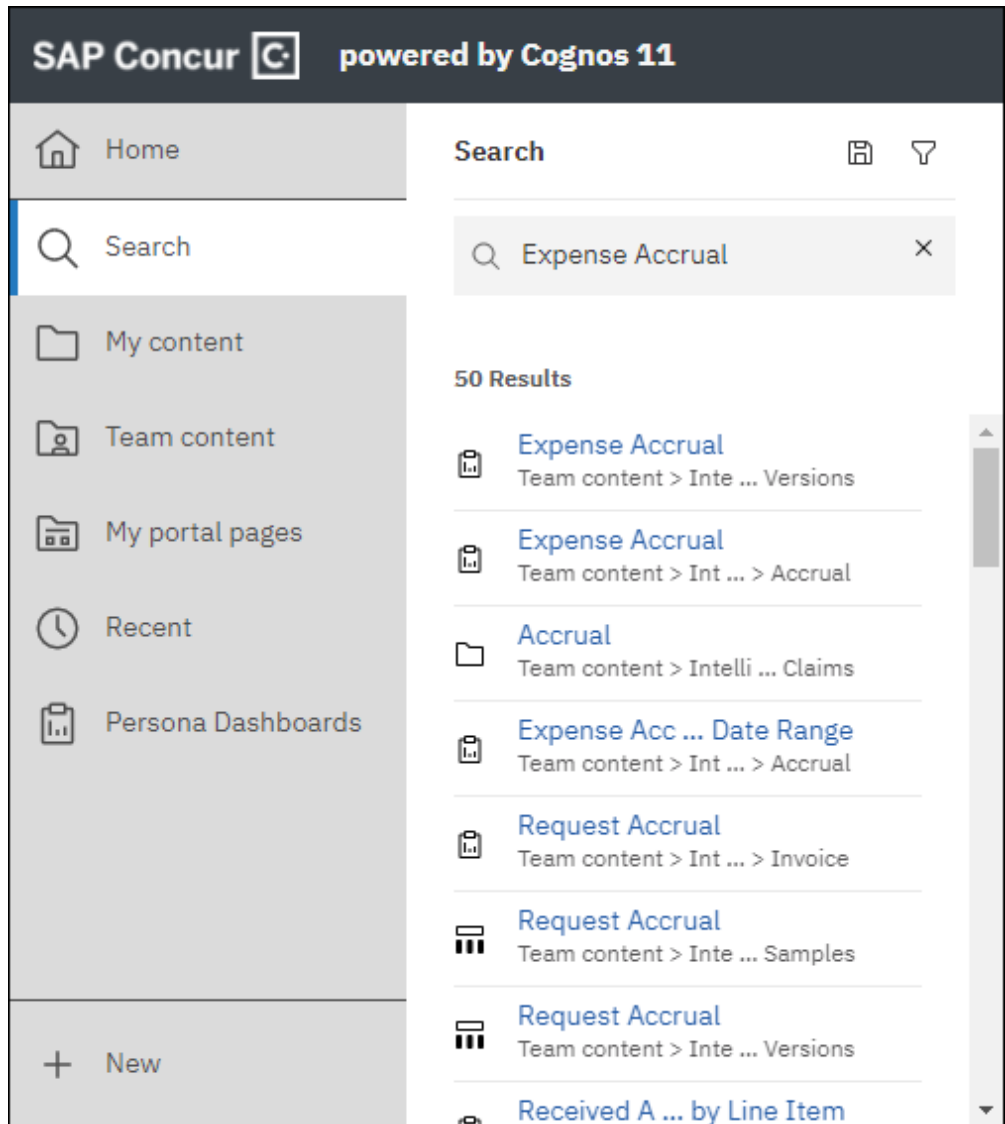
2. Enter the search term(s).

As you begin typing, search suggestions are listed.

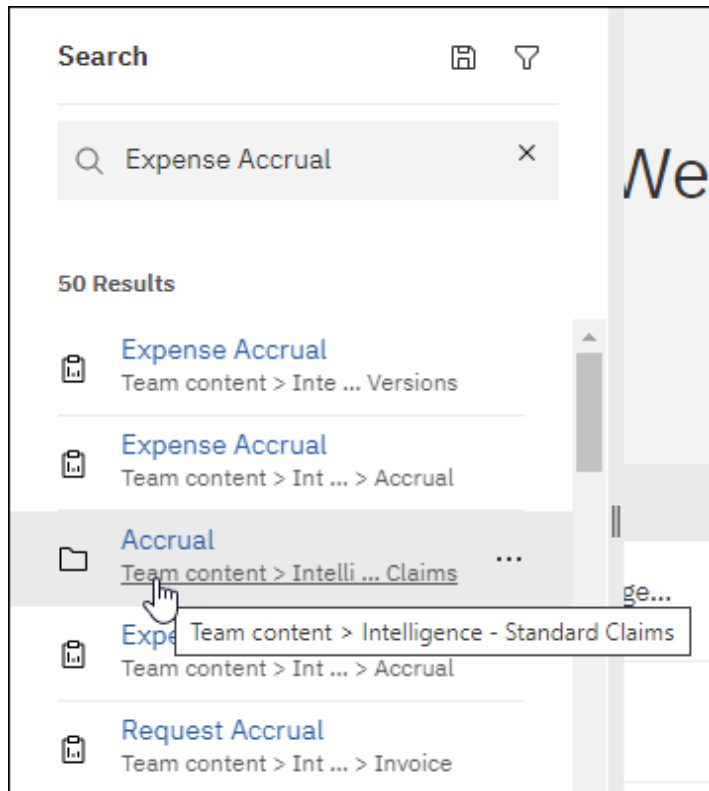


3. Either click one of the search suggestions or press the **Enter** key to run the search.



The search results are listed on the **Search** pane. The search results display up to 50 of the top matches in search results.

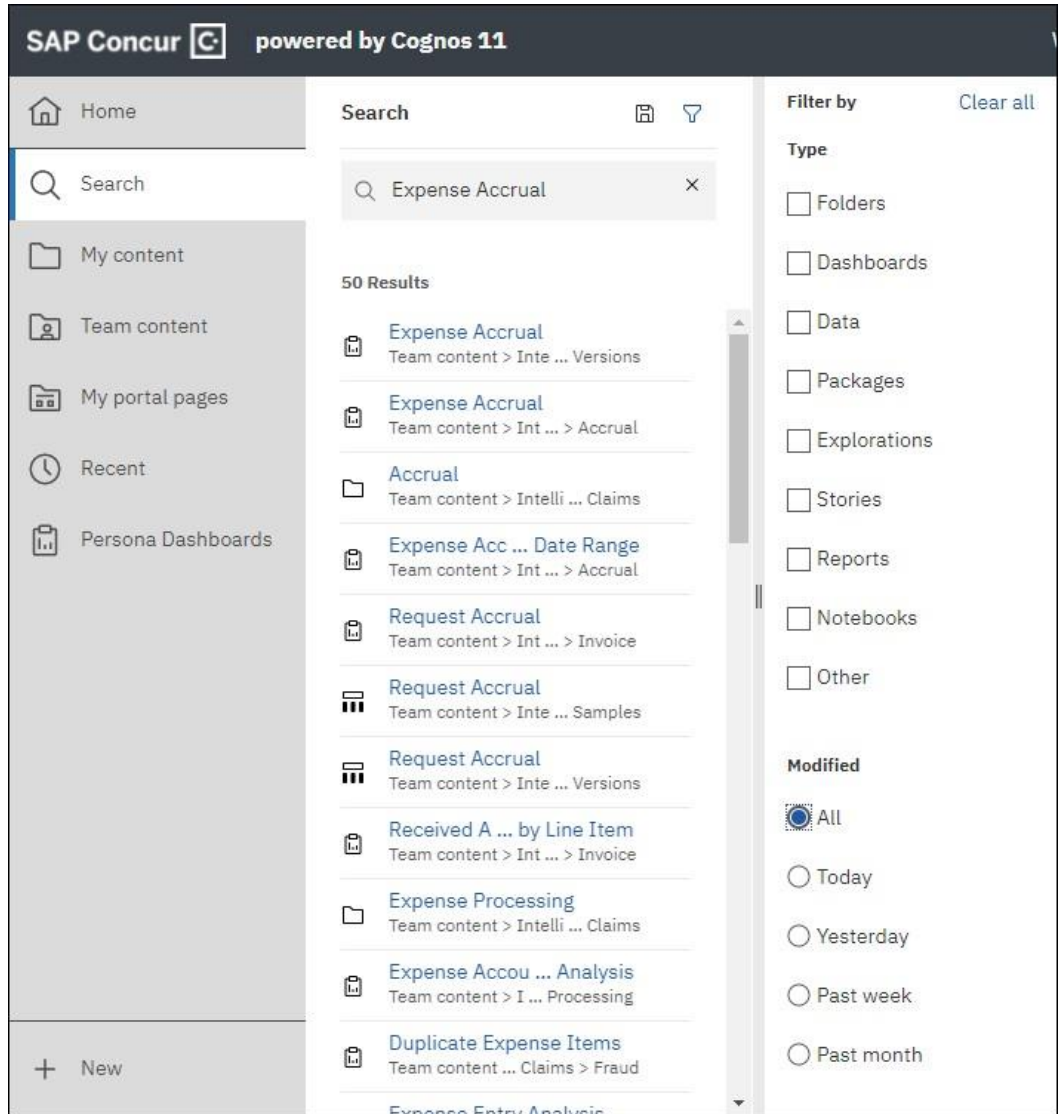


4. To view the full path of an item in the search results, place your pointer over the path below the item's name.



► **To filter the search results:**

1. After running a search, click the filter icon, , at the top of the **Search** pane.
2. Clicking the filter icon, , opens the **Filter by** pane to the right of the **Search** pane.



3. Select the filters you want to apply to the search results.

The search results are automatically filtered as you make your selections on the **Filter by** pane.

The screenshot displays a search interface with two main sections: a search results pane on the left and a 'Filter by' pane on the right.


Search Section:

- Search:** A search bar contains the text "Expense Accrual".
- 2 Results:** Two search results are listed, each with a folder icon and a title:
 - Accrual:** Team content > ... Standard Claims
 - Expense Processing:** Team content > ... Standard Claims

Filter by Section:

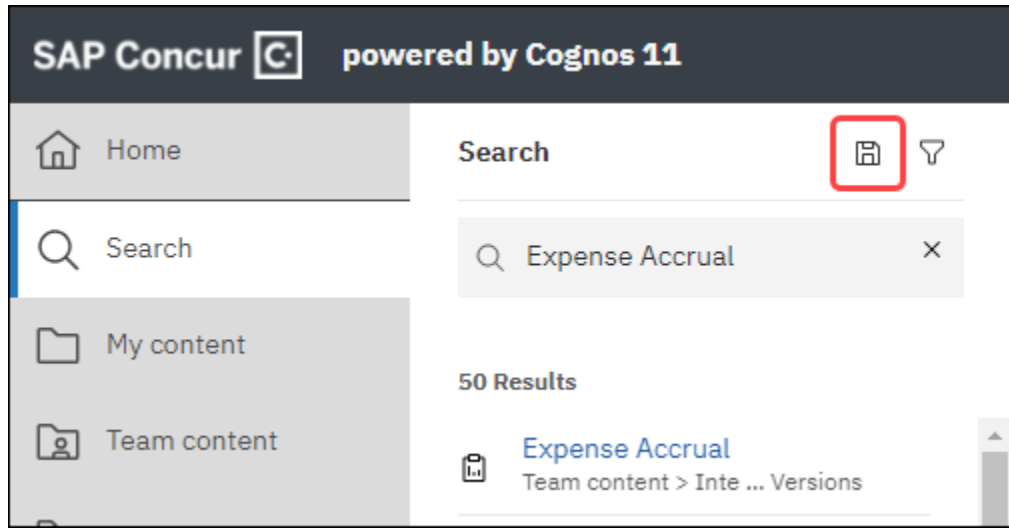
- Filter by:** A header with a "Clear all" link.
- Type:** A list of filter categories with checkboxes:
 - Folders (A mouse cursor is pointing at this checkbox.)
 - Dashboards
 - Data
 - Packages
 - Explorations
 - Stories
 - Reports
 - Notebooks
 - Other
- Modified:** A list of filter categories with radio buttons:
 - All
 - Today
 - Yesterday
 - Past week
 - Past month


4. To clear your filter selections, click the **Clear all** link at the top of the **Filter by** pane.

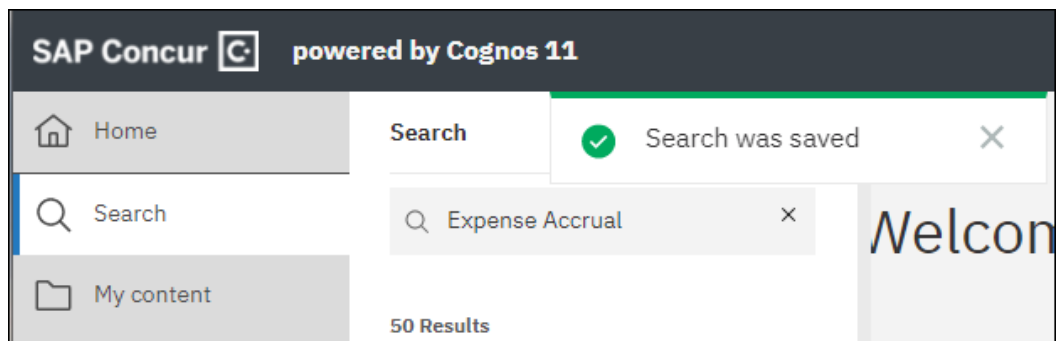
5. To close the **Filter by** pane, click the filter icon, , again.

▶ **To save a search:**


1. After running a search, click the **Save search** icon, , at the top of the **Search** pane.

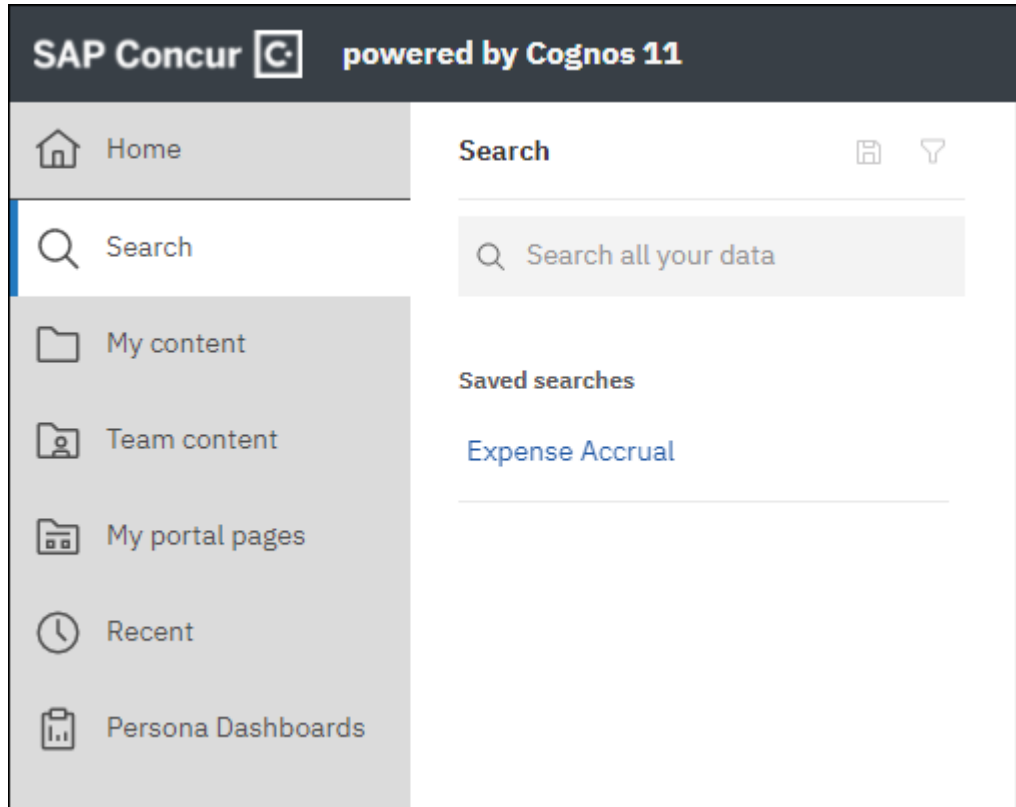


2. Clicking the **Save search** icon, , saves the search and the *Search was saved* message appears.

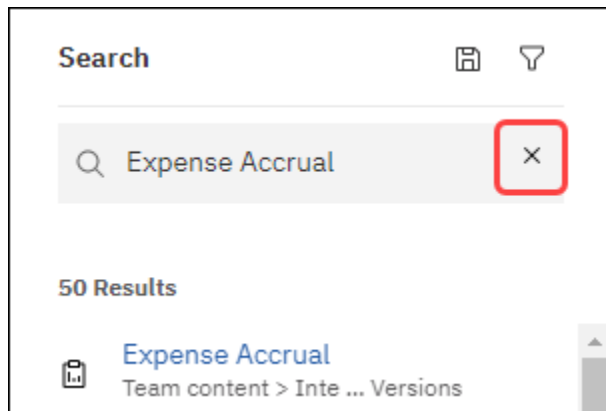


3. Saved searches are displayed on the **Search** pane when there are no search results displayed on the **Search** pane.


The name of the saved search is the search term(s) currently in the search text box when you click the **Save search** icon, . For example, if "audit" is the search term, the saved search name will be "audit".



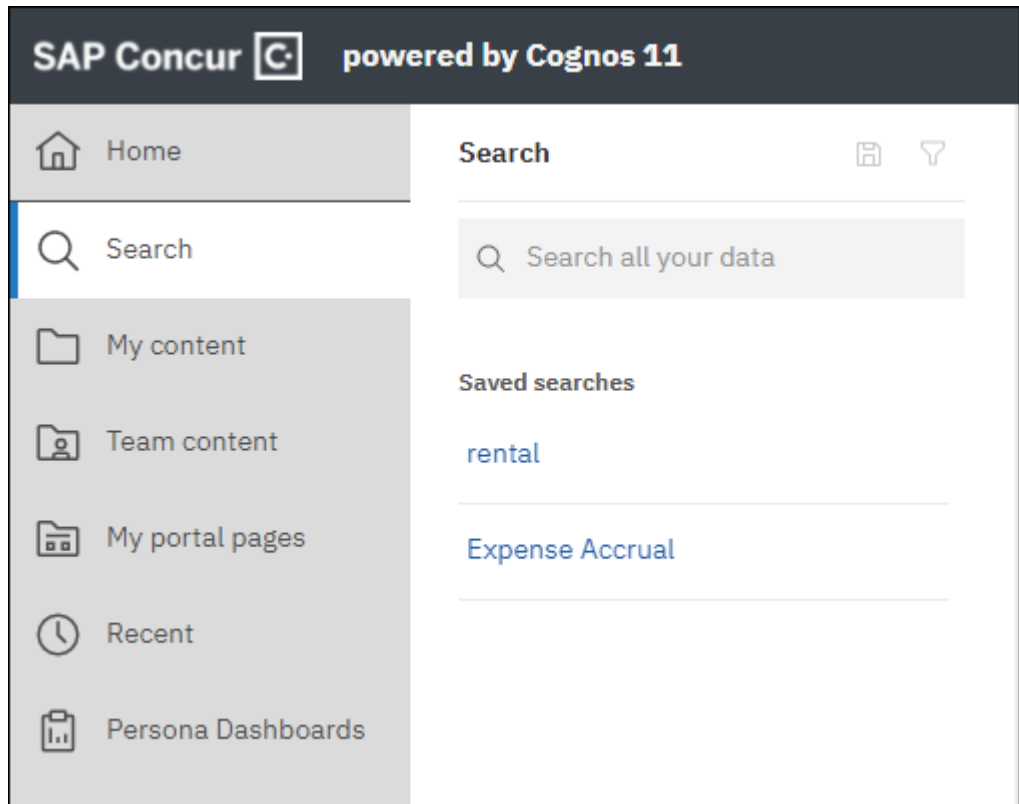
4. To clear your current search and remove the search results from the **Search** pane, click the **x** in the search text field.



▶ **To run a saved search:**

1. Click **Search**, , in the left navigation pane.

The **Search** pane opens to the right of the left navigation pane. Any saved searches are displayed in the **Saved searches** list on the **Search** pane.



2. Click a saved search link to run the saved search.

The search results for the saved search are displayed on the **Search** pane.

The screenshot displays the SAP Concur interface, powered by Cognos 11. The top navigation bar includes 'Home', 'Search', 'My content', 'Team content', 'My portal pages', 'Recent', and 'Persona Dashboards'. The 'Search' pane is active, showing a search input field with the text 'rental'. Below the search bar, it indicates '34 Results' and lists several search results, each with a document icon and a title:

- Car Rental Details**
Team content > Inte ... Versions
- Car Rental Summary**
Team content > Inte ... Versions
- Car Rental Summary**
Team content > In ... > Supplier
- Car Rental Details**
Team content > In ... > Supplier
- Expensed by C ... Company**
Team content > Dash ... Metrics
- Booked by Car ... Company**
Team content > Dash ... Metrics

Section 6: Running a Report or Dashboard

The process for running a report or dashboard with its default settings is the same between Cognos 10 and Cognos 11.

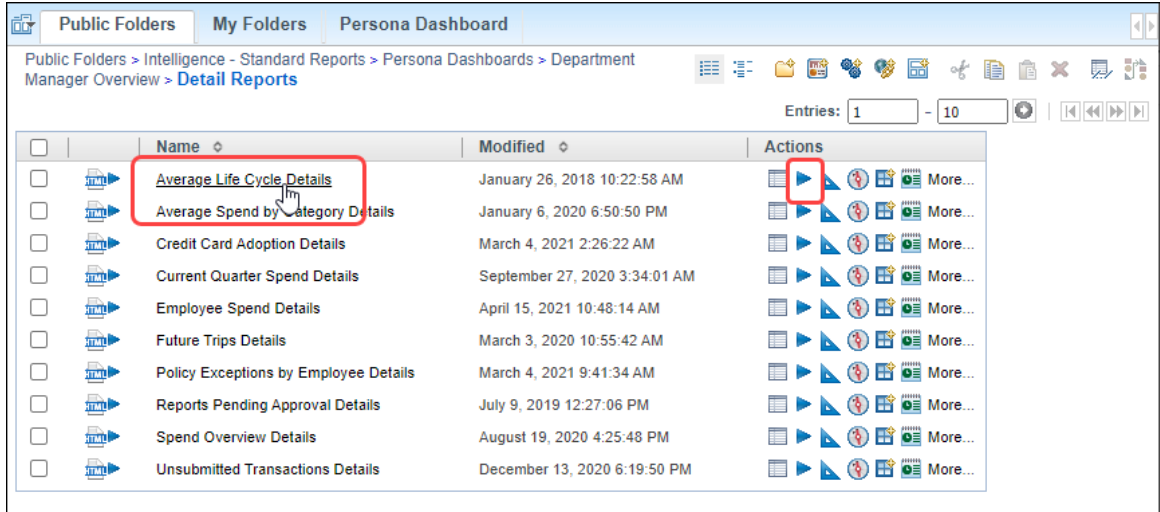
To run a report or dashboard with its default settings, click the report or dashboard name.

The functionality for running a report with options is the same, but where you run a report with options in Cognos 11 is different than in Cognos 10.

NOTE: IBM has identified an [error](#) in Cognos 11 if using javascript for reports in interactive mode. To avoid this error, make sure you are running reports with the **Run with full interactivity** report setting set to *No*. The **Run with full interactivity** setting is located in Report under **RUNNING & VALIDATING**.

Cognos 10 UI

Click a report's or dashboard's name in the **Name** column to run the report or dashboard with its default settings.



To run a report or dashboard with options, click the **Run with options** icon, .

On the **Run with options** page, select how you want to run and receive the report or dashboard.

Run with options - Average Life Cycle Details Help

Select how you want to run and receive your report.

Format:
HTML

Accessibility:
 Enable accessibility support


Language:
English

Delivery:
 View the report now

Prompt values:
No values saved
 Prompt for values

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

If you want to run a report or dashboard with advanced options, click the **advanced options** link on the **Run with options** page.

Run with advanced options - Average Life Cycle Details Help 

Select how you want to run and receive your report. If you produce a single report output, you can view it. If you produce multiple report outputs, you can save them, print them, or send an email notification.


Time and mode:


View the report now

Run in the background:

Now


Later:






Options

Format:



Number of rows per Web page:




Enable selection-based interactivity

Accessibility:

Enable accessibility support

Language:



Prompt values

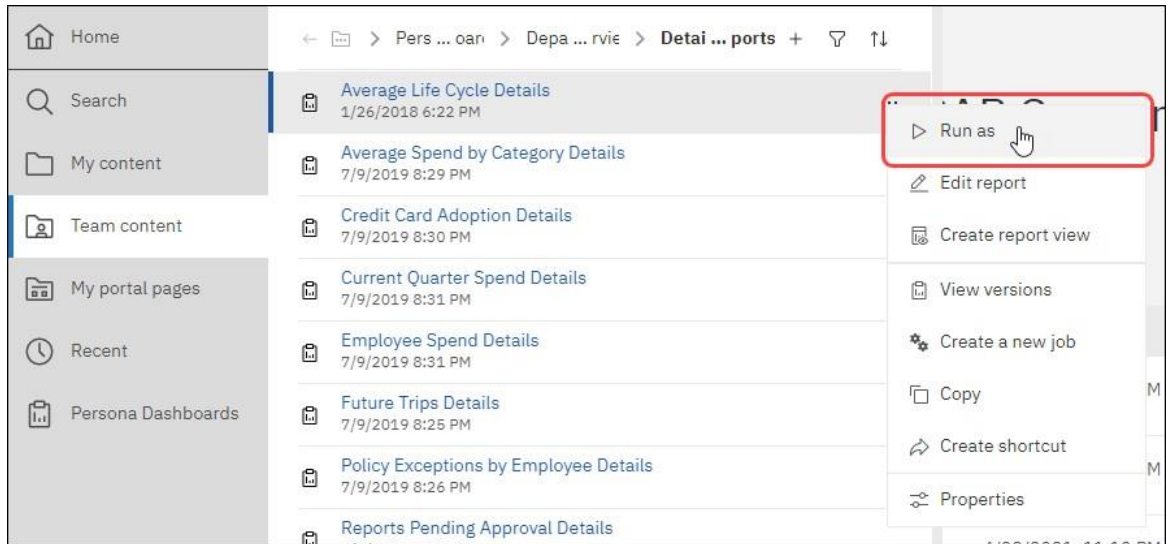
No values saved

Prompt for values

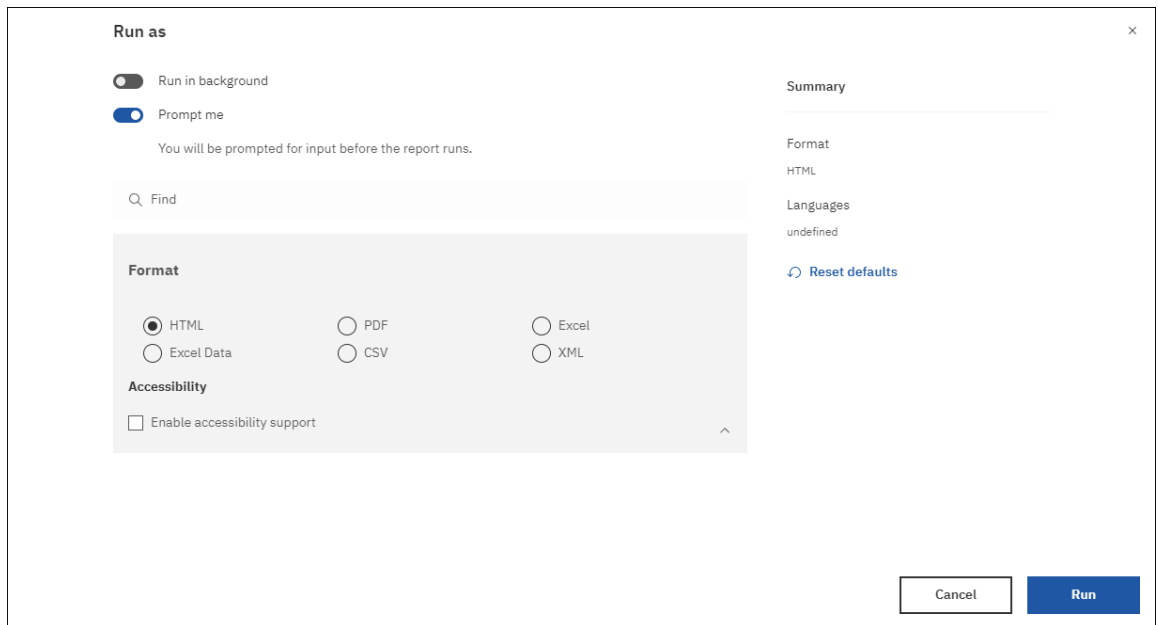
Click the **Run** button to run the report or dashboard.

Cognos 11 UI


To run a report or dashboard, click the **More** icon, , and then click **Run as**.



On the **Run as** page, select how you want to run and receive the report or dashboard.



Click the **Run** button to run the report or dashboard.

After a report or dashboard runs, you can click the **Run As** icon, , on the top navigation bar to access additional run options.

