IMS RA Registration Reports User Guide

Financial & Membership Services
Membership Management Services
Version 032011
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RA REGISTRATION REPORTS

Reports for RA Registration are written in the Cognos 8 software. You must have MRA Cognos security to view and print the reports.

The RA Reports can be accessed in three ways:

1) through the RA Registration subsystem,
2) through a url inside the NEA Wide Area Network,
3) through the Citrix Home page if you are outside the NEA Wide Area Network.

You can start one or more Cognos 8 sessions at a time.

Your username and password are tied to your Active Directory login. As long as you are logged into your computer, you will not be prompted for an additional login and password.

REPORT ACCESS THROUGH RA-REG SUBSYSTEM

Click the Reports icon on the RA REG landing page.

REPORT ACCESS INSIDE THE NEA WAN

Open your Web browser and type the URL Address for Cognos 8. http://reports.nea.org
Depending on your network setup you may be prompted for an additional name and password. If you are prompted, and if your Active Directory username begins with your two letter state ID, such as OR-XXXXXXX you will need to log in using the following format:

Your User name must start with nea\.

**REPORT ACCESS OUTSIDE THE NEA WAN**

After logging into Citrix, click on the Web Reporting icon on the Citrix homepage.
If you do not see the icon, open an Internet Explorer window inside Citrix and type in the URL Address for Cognos 8.

**http://reports.nea.org**

LOG OUT

In the Cognos Banner area, click Log Off.

Clicking the Close button in the upper right corner of your Internet Explorer window will close Cognos 8. You will have to launch the application again.
YOUR COGNOS ENVIRONMENT

The Cognos 8 screen consists of the following areas:

- Banner
- Tabs
- Display window

Description

Cognos 8 Banner

The **Banner** is the standard graphic displayed across the top of the application screen. You cannot change the application **Banner**.

- **Log Off** - Log Off – click to log off of Cognos.
- **Refresh** – click to refresh your window or data.
- **Search** - will search all Cognos folders for reports. (Note: There is an additional Search feature on your SEA Convention Portal page, we recommend you use that search).
| **Home** | - Home – click to return to your designated home page. Click on the arrow to Set your Home Page (default will be your SEA Convention Portal Page). |
| **My Area** | - My Area – click on the arrow, a drop down menu will appear to allow you to set your preferences, look at watch list or view your activities and scheduled reports. |
| **Launch** | - Launch – launches the various Cognos Studios, including Report Studio. |
| **Cognos Help** | - Cognos Help – click on arrow for various help options including a “Quick Tour” of Cognos. |

| **Tabs** | The Tabs in Cognos are used to quickly access the pages that are important to you. The Tab menu offers you options to add, remove or modify the sequence of your tabs. |
| **NEA Membership** | - NEA Membership has been created to simplify your Cognos navigation. It immediately displays dashboard reports and offers navigation from a single page to the membership standard and basic reports and to your My Folders reports. |
| **Public Folders** | - Public Folders contain the shared reports that are available to everyone in your organization. Access to Public Folders is controlled by the security set by your Cognos administrator. You will see only the folders and reports you are allowed to view. |
| **My Folders** | - My Folders is the location where you can store your own reports and links to the standard or basic reports in the Public Folders. |
| **Tips & Training** | - Tips & Training contain links to user guides, e-Learning, report documentation, reference documents, frequently asked questions, and tips for running MRA reports. |
| **RA-State** | - RA-State contains all of the reports related to the RA-REG system. |
| | - An administrator specifies the default tab setup for users. It is possible to personalize your Cognos Connection to add and remove tabs or reorder them to your liking. Other users are not affected by changes made to your Cognos Preferences. |

| **Display Window** | Display’s content of the selected tab. |
RA-STATE PORTAL PAGE

The RA-State Portal has been designed for easy navigation and usage. Though there are other options for running reports we think you will prefer to use this page.

You can return to your Portal Page from any screen in Cognos 8 by clicking on the Home icon.

<table>
<thead>
<tr>
<th>Screen Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affiliate Information</td>
<td>This frame contains the different Affiliate Reports available directly related to only the Affiliates.</td>
</tr>
<tr>
<td>Delegate Information</td>
<td>Displays the contents of the folder or report related directly for Delegates.</td>
</tr>
<tr>
<td>Allocation / Election</td>
<td>This frame contains the many different reports directly related to Allocation &amp; Election.</td>
</tr>
</tbody>
</table>
### Folders & Report Structure

<table>
<thead>
<tr>
<th>Screen Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Column 1</strong></td>
<td>Indicates the type of folder or report.</td>
</tr>
<tr>
<td>Folder and Report Icons</td>
<td>(yellow folder) - Folders</td>
</tr>
<tr>
<td></td>
<td>(blue folder) - Packages</td>
</tr>
<tr>
<td></td>
<td>Portal Pages</td>
</tr>
<tr>
<td></td>
<td>Report View</td>
</tr>
<tr>
<td></td>
<td>Report in PDF Format</td>
</tr>
<tr>
<td></td>
<td>Report in HTML Format</td>
</tr>
<tr>
<td></td>
<td>Report in CSV Format</td>
</tr>
<tr>
<td></td>
<td>Report in Excel Format</td>
</tr>
<tr>
<td></td>
<td>Report in XML Format</td>
</tr>
<tr>
<td><strong>Column 2</strong></td>
<td>A listing of the Reports and Subfolders in your specific My Folders</td>
</tr>
<tr>
<td>Report Listing</td>
<td></td>
</tr>
<tr>
<td><strong>Column 3</strong></td>
<td>The Actions button allows you to change the properties and actions for the</td>
</tr>
<tr>
<td>Actions</td>
<td>selected report. The display of Actions options will be controlled by the</td>
</tr>
<tr>
<td></td>
<td>security rights that have been set for you by the Cognos administrator.</td>
</tr>
</tbody>
</table>
RUN, SAVE AND PRINT A SEA CONVENTION REPORT

From the **SEA Convention Portal Page**, in the **Affiliates Info** window, click on the report link **Affiliate Listing**, a list of reports will appear in the right navigation window. All NEA Reports will launch a prompt page where you can select additional report filters.

Most SEA Convention reports have been designed to return output in PDF format.

<table>
<thead>
<tr>
<th>Prompt Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Year</td>
<td>Select the Membership Year.</td>
</tr>
<tr>
<td></td>
<td>Note: We have provided Current, Prior &amp; Prior-Prior</td>
</tr>
<tr>
<td>Prompt Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>State Affiliate</td>
<td>From the drop down, select your state affiliate. If you are an NEA Headquarters user, you will see all states. If you are a state user, only your state will display. Note: The red asterisk indicates a required field. The red arrow indicates that you have not yet entered the required field.</td>
</tr>
<tr>
<td>Sorting/Grouping</td>
<td>Select a sort option. The report is designed to page break at the lowest sort level. Note: State sort is the default.</td>
</tr>
<tr>
<td>Run Report</td>
<td>This button will run the report with the selections on the first page of the prompt. Clicking Run on this screen will return the results for the entire state selected.</td>
</tr>
<tr>
<td>Cancel</td>
<td>This button will close the prompt screen, cancel the report run, and return you to the SEA Convention Portal page.</td>
</tr>
</tbody>
</table>

2. Once you select the membership year, the state(s) will be displayed.

3. A value must be selected if the Run Report button is grayed out.

4. Make all necessary selections and click Run Report.

5. The following dialog box will appear briefly

   ![Image of a running timer with a Cancel button]

   Your report is running.
   Instead of waiting, you can select a delivery method to run the report in the background. Select a delivery method.
   
   Cancel

6. If you know the report is going to take a long time to run, you can click the Select a delivery method link and have the report emailed to you upon its completion. For training purposes, please wait for the report to complete, we will return to alternate delivery methods later.

7. Since the default output format for this report is PDF, the report will open in the Acrobat Reader window.
SAVE A REPORT OUTPUT WITH ADOBE

1. From the PDF window, click the Save a Copy icon.

2. In the File name, enter a more meaningful name.
3. Select the location to save your file and then click the **Save** button.

**PRINT A REPORT**

For best results, always print from a PDF Output Format.

Different style reports need different printer options. Always check your options before printing.

**Roster reports** - in the Page Handling section of the dialog box, choose **Page Scaling: Reduce to Printer Margins** and **CHECK Auto-Rotate and Center**.

**Label reports** - in the Page Handling section of the dialog box, choose **Page Scaling: None** and **UNCHECK Auto-Rotate and Center**.

1. From the **PDF window**, click the **Print** icon.
2. Choose the appropriate printer and confirm your page handling settings are correct for the type of report you are about to print.

3. Click **OK**.
SEARCH THROUGH A PDF FILE

As an example, run the Delegate Report

Click the Search icon. A window opens on the right or left side of your screen depending on the version.

1. Enter the word you are searching and click the Search button.
2. The results display on the right side of your screen. Select desired item.
3. Click Done or click on the icon again to close the Search window.
SEARCH PDF SUMMARY

4. **Run a Report with the Default Output Format** by going to the RA-State Portal page and clicking on the name of the report you would like to run. Choose the appropriate selections from the prompt page and click **Run**.

5. **Save a Report Output with Adobe** from the PDF window by clicking on the **Save a Copy** icon, rename report then select the location and click the **Save** button.

6. **Print a Report** from the PDF window by clicking on the **Adobe Print** icon, choose the appropriate printer and Page handling options for the type of report you are printing.

7. **Roster reports** – Page Scaling: Reduce to Printer Margins and check the Auto-Rotate and Center box.

8. **Label reports** – Page Scaling: None and Uncheck the Auto-Rotate and Center box.

9. **Search the report** from the PDF window by clicking on the **Search** icon.

EMAIL, RERUN AND CHANGE FORMAT OPTIONS FOR A REPORT

Please keep in mind NEA Privacy Policies when emailing reports.

Depending on your version of Adobe Reader you may have the option to send the report as a link. This option creates a temporary link only that will end when your Cognos session ends. We **DO NOT** recommend this option.

If you do not see the Email icon on your Adobe toolbar, right click on the Adobe toolbar and select File.

10. Click on the Keep this version **Keep this version** icon.

11. A drop down list will appear.

12. Click on the **Email Report** link.
1. Enter one or more email addresses in the To: textbox separated by a semi-colon “;”.

2. **De-select** the **Include a link to the report** option and select **Attach the report** option.

3. **Note**: The link will email the report itself and will launch the prompt pages or rerun the report to the default settings.

4. Click OK.

5. The email is received as:

   ![Email received image]

   Your email address is automatically added to the To: box.

   You must know the address of your recipient. At this time, you are not able to select an address from an address list.
It is best to always email a report using the PDF format. This will ensure that the recipient will be able to read the report even though they may not have access to Cognos.

**Always type a message in the body of the email.** Most mail programs redirect messages with a blank message body in to the junk mail folder.

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**Rerun the Report with New Prompts**

From the PDF window, click the Run icon. (A ‘report is running’ dialog box will briefly display.) The Standard Report prompt page will then reload to select new options for the report.

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**Run a Report with Options**

You can set the following options for the current run of a report:

- **Report Output Format** – run the report as PDF, Excel, XML or CSV
- **Language** – choose the language for the report*
- **Delivery Method** – have the report run now, have it run and sent to a printer* or have it be sent to you in an email.
- **Prompt Values** – whether you want to view the prompt page to run before your report.

These options override the defaults for a report for a one-time run.

* The language option and the delivery direct to printer options are NOT available at this time for NEA.

From the **SEA Convention Portal page**, locate the report you want to run with options.

1. Under **Actions**, click the Run with Options icon.

2. The following screen will appear.
3. From the **Format** drop down, choose the appropriate report format. You can select HTML, PDF, Excel, XML and CSV (preferred over Excel).

4. Language Options have not been implemented. **Skip this option.**

5. Choose the appropriate **delivery method**. (The Print option on this page will not work with the current set up of Cognos, do not choose that option).

6. If running a report with prompt pages, be sure to check the **Prompt for Values** checkbox.

7. Click **Run**

**VIEW REPORT RESULTS IN DIFFERENT FORMATS**

Most NEA Standard Reports have been designed to run as a PDF file.

After a report has run, you can change the format and rerun it as HTML, XML, Excel or CSV.

1. Click on the View Format icon on the Cognos toolbar.

2. A drop down menu will appear, click on the format you would like to view.

**NOTE:** A ‘report is running’ dialog box may display depending on the report format you choose.
CHANGE REPORT OUTPUT TO EXCEL OR CSV

The report data is static after it is exported to Excel.

Exporting to Excel will retain the formatting. Export to Excel versus CSV to maintain formatting. CSV is recommended over Excel.

You can export to Excel prior to running the report from the Run with Options dialog box or after you have finished running the report.

Note: Once the report is rendered into an Excel View, save the report to a local drive as an excel workbook before manipulating the data.

1. Run the Affiliate Listing from the Affiliate Info window.

2. Click the View icon.
3. Select View in Excel Options.

<table>
<thead>
<tr>
<th>View Formats</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View in Excel 2007 Format</td>
<td>Excel 2007 format renders report output in native Excel XML format, also known as XLSX, that provides a fast way to deliver native Excel spreadsheets to Microsoft Excel XP, Microsoft Excel 2003, and Microsoft Excel 2007. It supports up to 1,048,576 rows and multiple sheets.</td>
</tr>
<tr>
<td>View in Excel 2002 Format</td>
<td>Excel 2000 format can be viewed with versions of Excel 2000 and later. It supports up to 65,536 rows and multiple sheets.</td>
</tr>
<tr>
<td>View in Excel 2000 Single Sheet Format</td>
<td>Excel 2000 single sheet format offers improved security. Excel 2000 may have cookies in the URLs to spreadsheets, which could be used to illegally impersonate a user. It supports up to 65,536 rows and multiple sheets.</td>
</tr>
<tr>
<td>View in CSV Format</td>
<td>Reports saved in delimited text (CSV) format open in the application associated with the .CSV file type, usually Microsoft Excel.</td>
</tr>
</tbody>
</table>


5. Click Open or Save.

6. If you selected Open, Excel will open and the report is displayed.
7. Save the report to a local drive as an excel workbook before working on the report.

**CHANGE REPORT OUTPUT TO EXCEL OR CSV PRIOR TO RUNNING THE REPORT**

1. From your SEA Convention Portal, locate the report you want to export to Excel or CSV. We recommend using CSV over Excel format.

2. Under Actions, click the Run with Options icon.

3. From the Format drop down list, select the appropriate export.
4. Select the appropriate delivery method.

5. Click Run.

6. The standard prompt page will be displayed. Select the appropriate options and run the report.

7. Click Open or Save.

8. If you selected Open, Excel will open and the report is displayed.

9. Save report to a local drive as in an Excel Workbook format.

**CHANGE REPORT OUTPUT TO ADOBE ACROBAT (PDF) & HTML**

Most reports are created to automatically display the output in PDF format. However, you can change the output of a report either prior to running it or after it has finished.

1. Run the Affiliate Listing from the Affiliate Info window.

2. Click the View icon.

3. Select View in HTML Format. The report is rerun and displayed in HTML.

4. The View icon is now changed to the HTML icon.

5. To display the report as PDF or any other formats, click the View icon again and choose the appropriate format.
You can also choose the output format prior to running the report by clicking on the Run with Options button in the Actions column and then choosing the appropriate format.

### RUN AND PRINT MAILING LABELS

The Delegate Mailing Labels in Cognos 8 have been designed using Avery 5160 label types.

1. Run the Delegate Mailing Labels from SEA Convention Portal ➔ Delegate Info.
   The standard prompt page will appear.
2. Select the necessary prompts.
3. Click Run.
4. From the PDF window, click the Print icon. The PDF print window will open.
5. For **Label reports**, in the Page handling section of the dialog box, choose **Page Scaling: None** and **UNCHECK Auto-Rotate and Center**.

6. Click **OK**.
## COGNOS CONNECTION TOOLBAR ICONS

Note – Most of these icons will only work in your **My Folders** tab.

<table>
<thead>
<tr>
<th>Name</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List View</td>
<td><img src="image" alt="List Icon" /></td>
<td>Show the folder contents in a list view. This is the default view.</td>
</tr>
<tr>
<td>Detail View</td>
<td><img src="image" alt="Detail Icon" /></td>
<td>Show a more detailed view of the folder contents such as report descriptions.</td>
</tr>
<tr>
<td>New Folder</td>
<td><img src="image" alt="New Folder Icon" /></td>
<td>Create a new folder. You can only create a folder in your My Folders tab.</td>
</tr>
<tr>
<td>New Job</td>
<td><img src="image" alt="New Job Icon" /></td>
<td>Set the schedule to run a report or a group of reports.</td>
</tr>
<tr>
<td>New URL</td>
<td><img src="image" alt="New URL Icon" /></td>
<td>Create a link to a URL in the folder you specify.</td>
</tr>
<tr>
<td>New Page</td>
<td><img src="image" alt="New Page Icon" /></td>
<td>Create a new customizable page.</td>
</tr>
<tr>
<td>Cut</td>
<td><img src="image" alt="Cut Icon" /></td>
<td>Cut the selected report(s) from the folder.</td>
</tr>
<tr>
<td>Copy</td>
<td><img src="image" alt="Copy Icon" /></td>
<td>Copy the selected report(s) to the clipboard.</td>
</tr>
<tr>
<td>Paste</td>
<td><img src="image" alt="Paste Icon" /></td>
<td>Paste the report(s) from the clipboard to the folder.</td>
</tr>
<tr>
<td>Delete</td>
<td><img src="image" alt="Delete Icon" /></td>
<td>Delete the selected report(s).</td>
</tr>
<tr>
<td>Set Properties</td>
<td><img src="image" alt="Set Properties Icon" /></td>
<td>Allows you to change the properties of your My Folders tab.</td>
</tr>
<tr>
<td>Order</td>
<td><img src="image" alt="Order Icon" /></td>
<td>Allows you to change the order of reports in the folder.</td>
</tr>
</tbody>
</table>
# REPORT ACTION ICONS

<table>
<thead>
<tr>
<th>Name</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Properties</td>
<td><img src="image" alt="Icon" /></td>
<td>Shows report properties, such as name, description, run history, report views and permissions.</td>
</tr>
<tr>
<td>View the Output Version</td>
<td><img src="image" alt="Icon" /></td>
<td>View the Output version of the report. This icon will only appear for reports that have been run with options and saved.*</td>
</tr>
<tr>
<td>Run with Options</td>
<td><img src="image" alt="Icon" /></td>
<td>Runs a report, allowing you to choose options such as saving, emailing, report formats.</td>
</tr>
<tr>
<td>Schedule</td>
<td><img src="image" alt="Icon" /></td>
<td>Sets up a Report View to run a report unattended.</td>
</tr>
<tr>
<td>More…</td>
<td><img src="image" alt="Icon" /></td>
<td>Opens a screen and lists all advanced options.</td>
</tr>
</tbody>
</table>

**Available actions:**

- [Set properties](#)
- View most recent report in HTML
- View report output versions
- Run with options...
- Open with Report Studio
- New schedule...
- View run history
- Alert me about new versions
- Do not alert me about new versions
- Move...
- Copy...
- Create a shortcut to this entry...
- Create a report view of this report...
- Add to bookmarks...
- Delete

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Saved output in Cognos will be deleted after 5 days. If you would like to save the information long term, save to a local drive.