

Frequently Asked Questions | EXTERNAL
Analysis and Intelligence reporting solutions

Cognos 11 User Interface Update

Updated: March 2023

Our reporting solutions provide your organization with insights and visibility into your spend to drive compliance, cost savings, and transform processes. We are updating the user interface (UI) of Analysis and Intelligence powered by IBM Cognos to improve usability and efficiency for your reporting users, as well as enhance the level of support from IBM.



Find all resources at [our Cognos 11 resource center](#).

Find this FAQ also [in Japanese](#).

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FREQUENTLY ASKED QUESTIONS

What is happening, and what is Cognos?

The SAP® Concur® reporting solutions known as Analysis and Intelligence are powered by IBM Cognos. Currently, these solutions use Cognos version 10, and we are updating to Cognos version 11. This change comes with an updated user interface (UI) to improve customer experience as well as enhancing the level of support from IBM.

Why are we updating to Cognos 11?

Cognos 11 incorporates a more modern UI that follows current practices for usability and efficiency. Cognos 11 is the current supported version by IBM and receives more timely support for features and fixes. This improves the user experience, and it also assures a higher level of support from IBM.

When is this planned to happen?

In advance of this update, we launched an early access program on July 10, 2021. This is not open for other customers to join, but it provides an opportunity for us to prepare for the full update.

After the early access program, we are planning to update the UI in groups of customers. We will update the UI automatically for each group of customers over a weekend, avoiding some weekends around holidays. We are planning to start this in November 2021 for some customers, and the update will continue into 2022.

We are updating by entity; customers with multiple entities or test sites may have different update timeframes across all their sites.

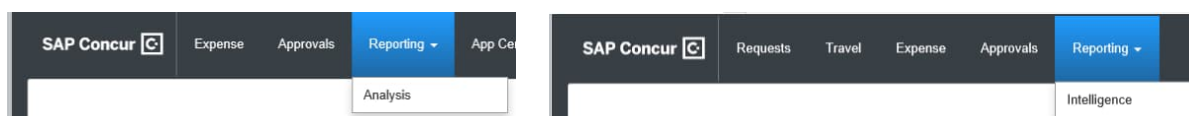
Due to technical reasons, we are not able to schedule any specific entity's update; the dates are planned to be pre-determined, and customers cannot move earlier or later.

What solutions does this impact?

The changes impact both our Analysis and Intelligence solutions. This does not impact the SAP® Concur® mobile app or Analytics customers.

How do I know if we have Intelligence or Analysis?

You can check to see which solution your organization has by checking the Reporting dropdown in SAP Concur solutions. It will say "Analysis" or "Intelligence."



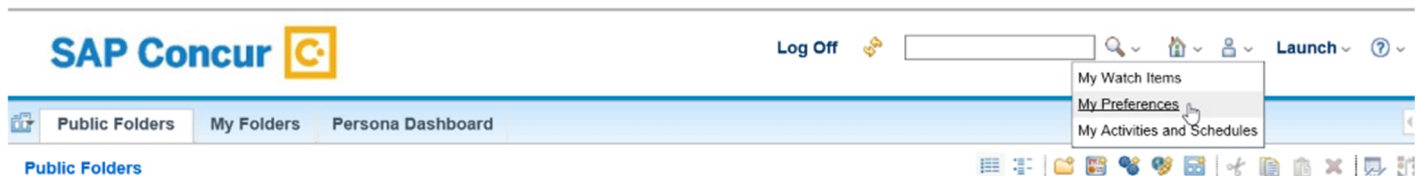
How should I prepare?

We do recommend letting your reporting users know about the update so that they are aware and expecting it. You can also pre-educate users and point them to the training materials, [available here](#).

This update does not impact any data or Standard Report offerings. It is an update to the UI only.

However, you should pause on authoring new reports on the Friday before you are scheduled to be updated. Any reports in progress over your update weekend may not be reflected after the update. After the update, Schedule Owners may need to renew their credentials in order to maintain or create report schedules and jobs.

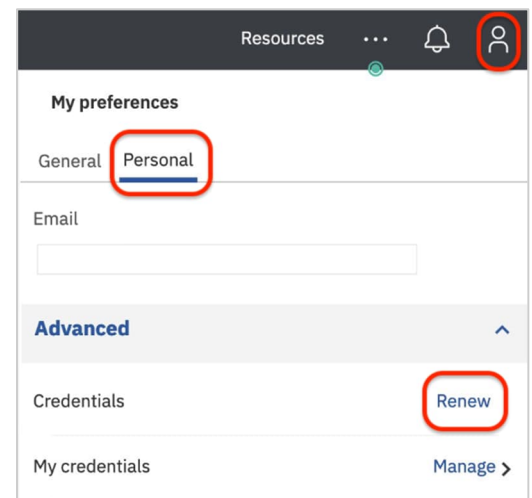
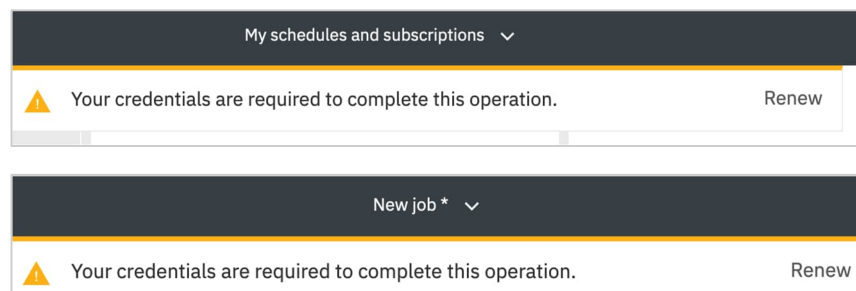
Any scheduled reports queued during the assigned weekend update window will not run, similar to your experience during a regularly scheduled maintenance window. Be aware of any scheduled reports you currently have running on a weekly, monthly, or other cadence. Only the owner of the schedule can view this. You can find the re-occurring report schedules as shown below in Cognos 10 in 'My Activities and Schedules':



How do I renew my credentials for scheduled reports and creating jobs after we are updated?

Some Schedule Owners may need to renew their Cognos credentials before scheduled reports or jobs can run or before creating new or modifying existing schedules or jobs.

You may need to take this action at the user level (Profile > My Preferences > Personal > Advanced > Renew).



Who does this impact at my organization?

This update only impacts users who have access to the Reporting tab within SAP Concur solutions. This includes users with the following system roles:

- Cognos Consumer
- Cognos Business Author
- Cognos Professional
- BI Manager (depending on your set up, may be all people managers)

How do I pull a report of users who have roles that will be impacted?

For Cognos Consumer, Cognos Business Author, and Cognos Professional roles, please pull this report: Public Folders > Standard Reports > Administration > Employee Roles

For BI Manager roles, if you use this role, consider this approach: Public Folders > Standard Reports > Administration > Employee Details

Will anything be changing with our Cognos system roles?

No. Your reporting users will have the same access and rights prior to the Cognos 11 update. System roles are listed above.

What happens if I am using the reporting tool while the update happens?

During this time, users will not be able to use your reporting tool. If users are in Cognos during this time, they will be prompted with an error message after clicking on the Reporting tab. Users will lose any work not saved if they are in the maintenance window and got logged off.

This does not impact any other solutions (for example, Concur Expense, Concur Travel, and others).

Are there any special requirements for the updated UI to function?

No. Generally, Cognos 11 is supported on major browsers such as Google Chrome, Mozilla Firefox ESR, Apple Safari, and Microsoft Edge, including for Report Studio (called "Report" in Cognos 11). To find specific browser version and support information, visit [IBM Cognos support](#) and navigate to '[Cognos Analytics on Premise 11.1.7](#)' and select 'Software'. Click the 'Supported Software' tab and scroll down the page to see the list of web browsers that are supported. We recommend using Chrome and Firefox browsers for the new 'Report'. Note that SAP Concur is [changing our support policy for IE 11](#) on January 1, 2022. However, until Cognos 11 has been rolled out for all Analysis and Intelligence customers, we will provide support and allow exceptions for investigation to issues related to Cognos 10 and IE 11.

Query Studio: As this is a legacy studio from IBM Cognos, it is only currently supported on Internet Explorer 11 or on Mozilla Firefox. Our recommendation is to only use Mozilla Firefox ESR, but, if you use IE 11, we recommend Compatibility Mode. Note: Analysis users can only edit reports in Query Studio using IE 11 or Mozilla Firefox. Analysis or Intelligence users that want to run reports can do so in other supported browsers.

How are test sites being updated?

Customer test sites will also be updated, but they may not be updated at the same time as your production site(s). We are planning to post an internal alert in Cognos in each entity informing you of when the update will occur for that site about 30 days in advance. It is not possible to schedule when sites move. You may experience a period where one site is updated and the other is not.

Is there any extra cost to this update?

No, this update is included in your existing SAP Concur subscription.

How are you updating training materials on concurtraining.com to reflect these updates?

We intend to maintain versions with both the current and updated UI for the duration of the change. Once the update is complete, we will retire training materials that reference Cognos 10.

After the update is complete, where can I go for information on getting more out of my reporting solution?

To get the most of your reporting solutions, find training resources [related to Analysis here](#) or resources [related to Intelligence here](#).

Where can I go to learn more?

We [have set up a web page](#) that consolidates all information and resources you need to know about this update.

If you run into an issue, please create a Support Case with the 'Analytic Reporting' selection for any items not addressed in this FAQ.

DETAILED CHANGES & HOW-TOS

The visible changes are to the user interface.

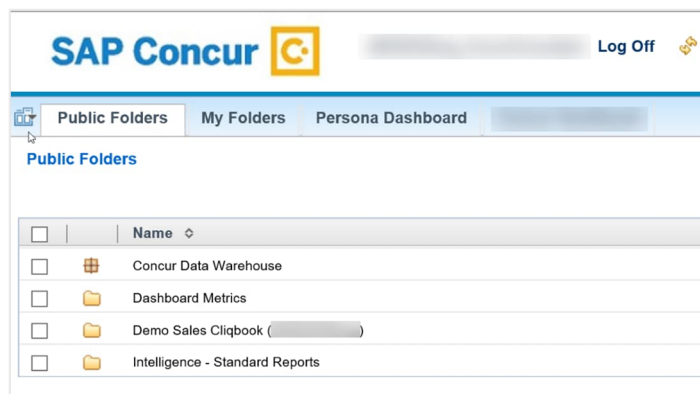
- The visual design has an updated look and feel. Enhancements to the user interface (UI):
 - More modern looking interface
 - Instead of hovering over actions such as 'run a report', 'schedule a report', and more menu items, they can be found with just a right click.

Reminder: Customers should pause on authoring new reports on the Friday before they are scheduled to be updated. Any reports in-progress design over their update weekend may not be reflected after the upgrade.

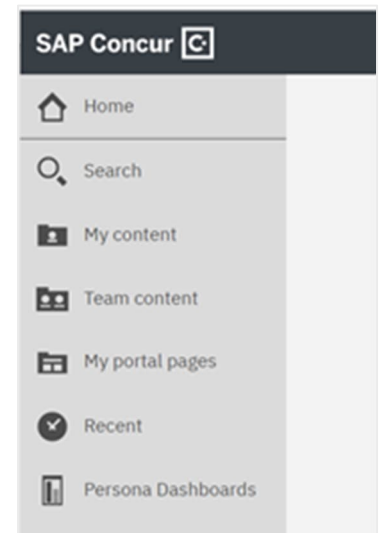
Any scheduled reports queued during the assigned Saturday update window will not run, similar to your experience during a regularly scheduled maintenance window.

Terminology changes

- 'Report Studio' is renamed to 'Report' in Cognos v11, applicable for Intelligence customers only.
 - Includes data element searching within the Concur Data Warehouse Model
 - Query Studio will remain as Query Studio in Cognos 11, applicable for Intelligence and Analysis customers.
- 'My Folders' is now 'My content' and 'Public Folders' is now 'Team content'. These folders contain reports that have been previously built.



Cognos 10

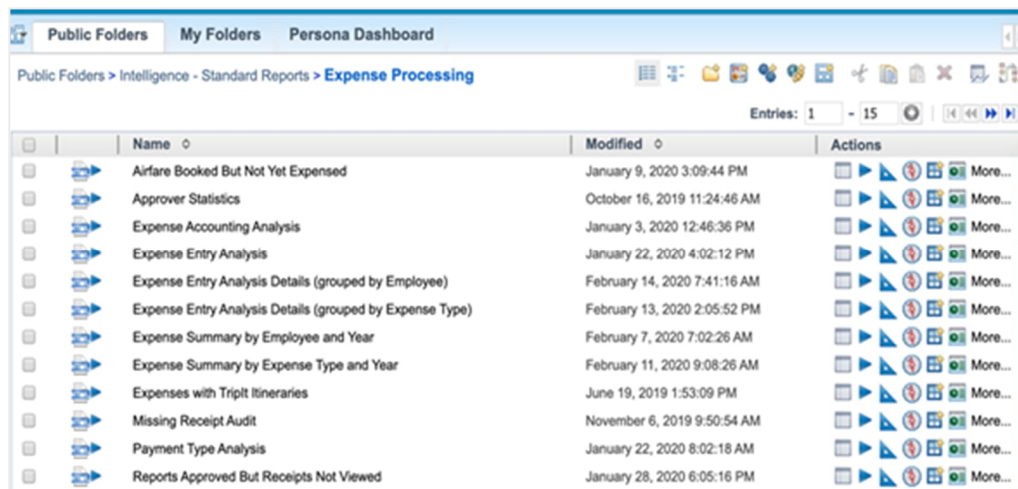


Cognos 11 (exact screenshot subject to change)

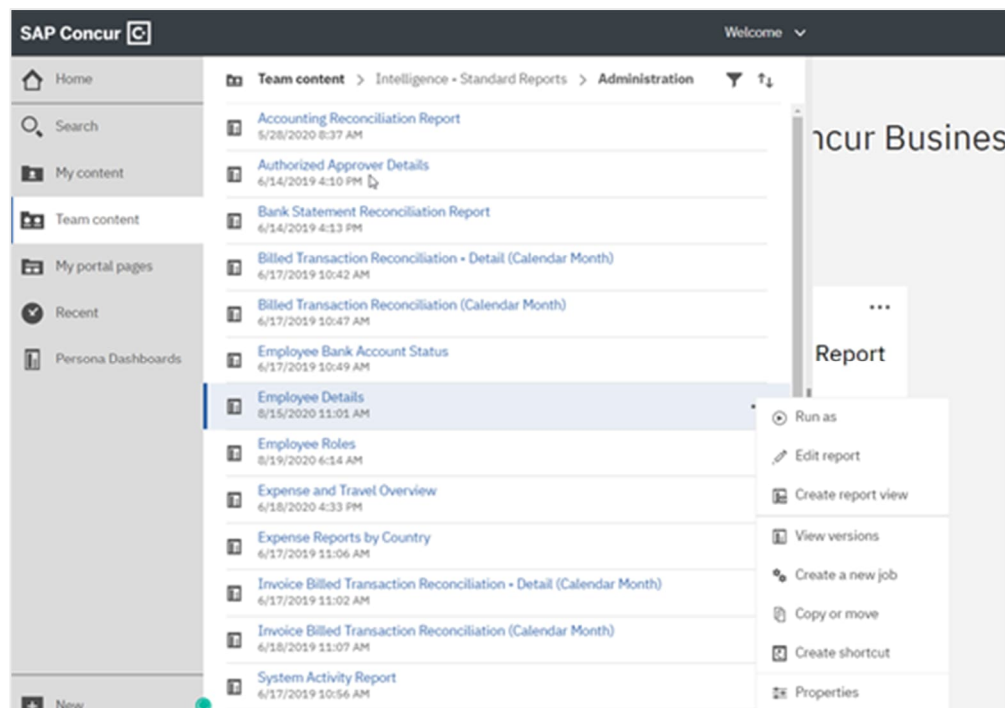
Icon changes

You can view the same functions as previously available by right-clicking. To Schedule a report, you can do so now in the 'Properties' option.

Note that if you make your browser window smaller in Cognos 11, the text disappears and is represented only by an icon.



Icons in Cognos 10 under 'Actions'

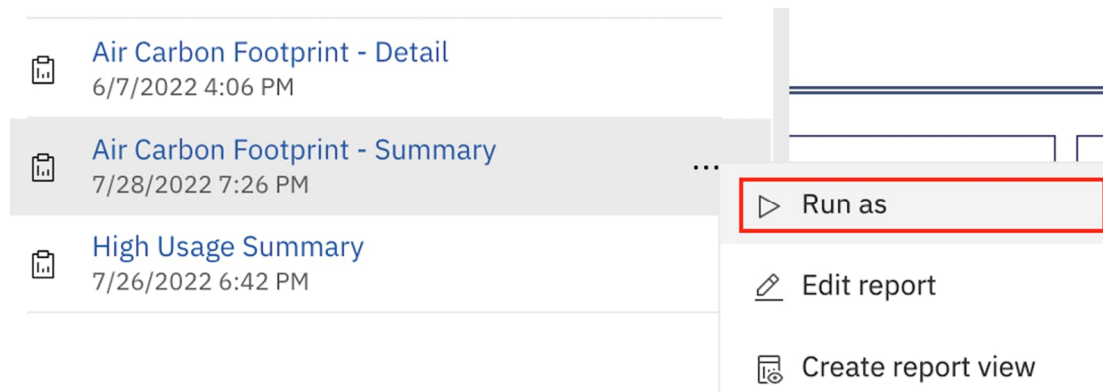


Right-click in Cognos 11 to view the same actions. Schedule a report in 'Properties' (exact screenshot subject to change)

Functionality changes

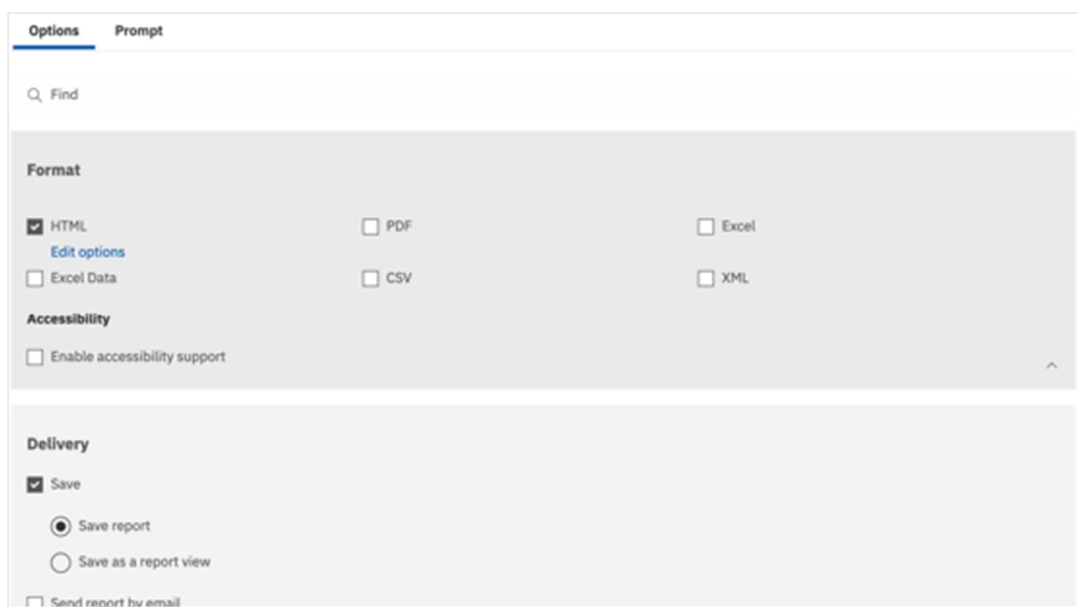
“Run as” menu item:

In Cognos 11 you need to manually select the date range. Instead of defaulting to a value that may give you much more data than you need and creating a report that takes a long time to run - simply select the start and stop dates appropriate for your purposes:



What configuration options are available for my reports?

The ‘Options’ menu allows you to choose a file type, delivery, and formatting options:



Options

Prompt

← HTML options

Number of rows per web page

20


▼

☒ Enable selection-based interactivity


How can I review the history of my report runs?


Select the 'View Run History Details' link to see detailed run history on a per-report basis:


[< Back](#) **Apr 23, 2021, 7:39:56 PM**

 Successful

[View run history details >](#)

Messages 


 The parameter cache was created.

Run time 

Request time Apr 23, 2021, 7:39:56 PM

Start time Apr 23, 2021, 7:40:20 PM

End time Apr 23, 2021, 7:40:21 PM

Report 

No report options record available.

View run history details - Test

Help

View the details of this particular run.

Start time:
April 23, 2021 3:34:43 PM

Completion time:
April 23, 2021 3:35:00 PM

Status:
Succeeded

Messages

Severity: (All)

Entries: -

Time 0 | Message

No entries.

Job

Steps:

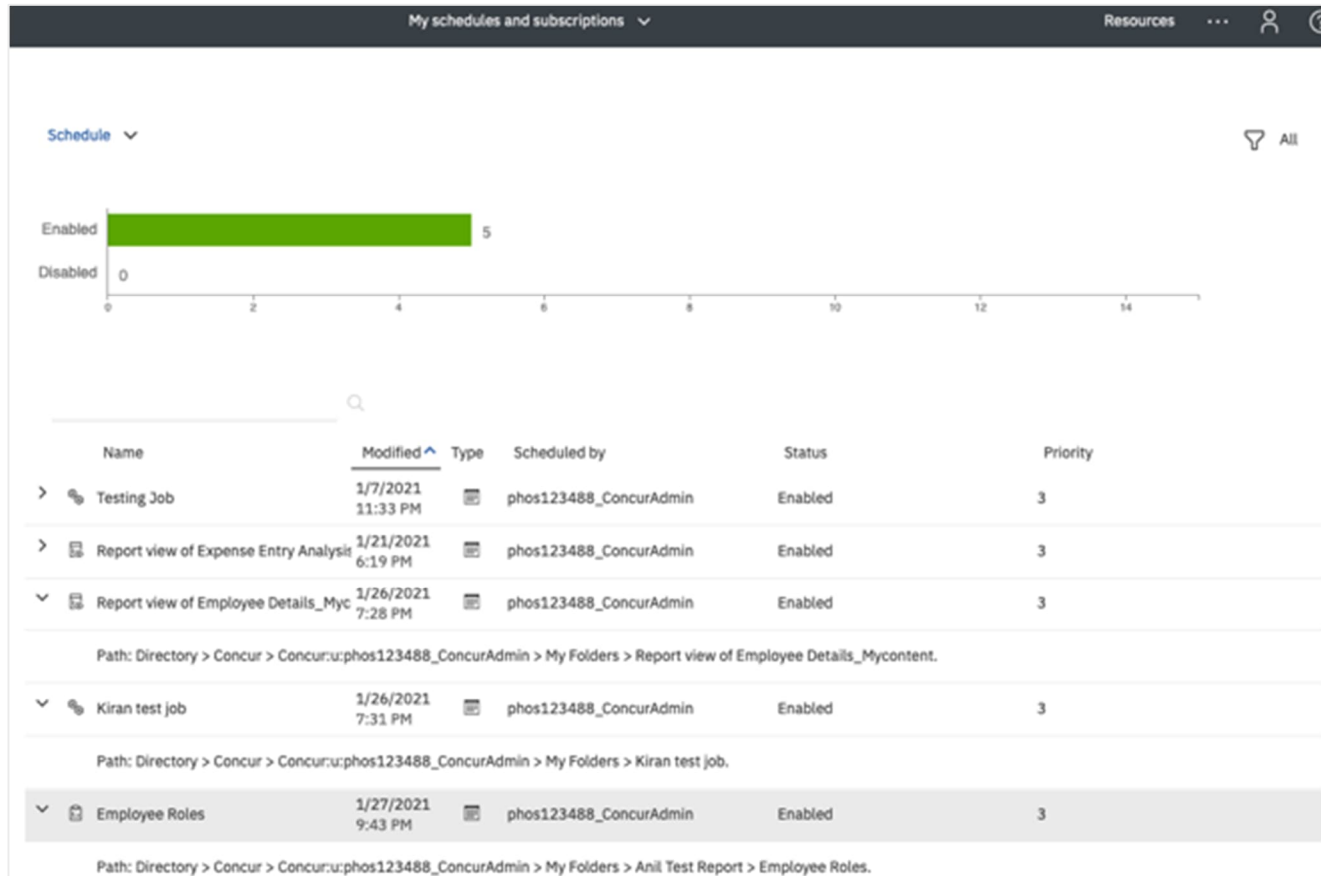
Entries: 1 - 2

<>	Name	Request time	Start time	Completion time	Status	Actions
	New Report Test	April 23, 2021 3:34:43 PM	April 23, 2021 3:34:57 PM	April 23, 2021 3:34:59 PM	Succeeded	
	New Report Test	April 23, 2021 3:34:43 PM	April 23, 2021 3:34:59 PM	April 23, 2021 3:35:00 PM	Succeeded	

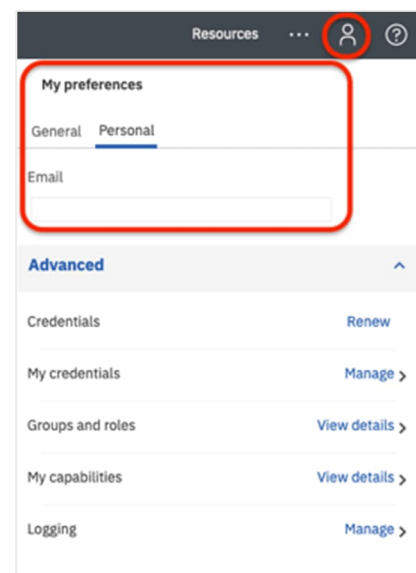
Close

How can I see the scheduled reports I created?

Your scheduled reports should appear under 'My schedules and subscriptions'

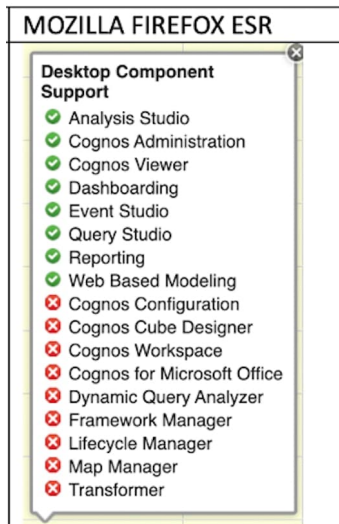


If you do not see it listed, please select: My preferences > Personal > Advanced > Renew credentials:

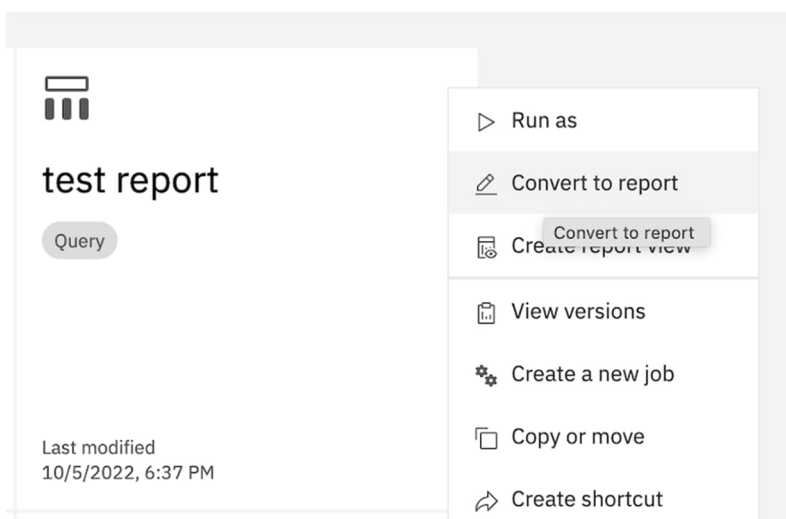


Is there any impact to Query Studio?

Query Studio is still available - but it requires use of the Mozilla Firefox ESR browser (please see IBM's component support in the graphic). Also note this legacy studio will probably be deprecated in the next major release from IBM (no timetable for that currently). This should not pose a problem though because you can also open/modify/resave reports created in Query Studio using the Reporting feature in Cognos 11.



To do this, use another modern browser (like the Chrome browser) and locate your report that was created in Query Studio (should be in the My Content or Group Content folder). Right-click on the ellipsis to the right of the report name to bring up the context menu; select the "Convert to report" option and save the report with a new name. Note: this requires the use of an account that has a Professional license associated with it.



TROUBLESHOOTING & BEST PRACTICES

My Report doesn't complete or takes too long to run

Having base queries with no filters causes the report to take much longer and/or not complete in some instances. Make sure to apply a filter or prompt so that you only request the needed amount and type of data. Limit data in all queries prior to joins/unions. Update default prompts so users don't inadvertently request 10 years of data when they only need to last 12 months.

Billed Transaction Reconciliation - Detail (Calendar Month)

Prompts

Date Range

From:	January	2013
To:	January	2022

Constrain to only the needed amount of data

If your company needs to schedule the same report multiple times (perhaps for different organizations), rather than making multiple copies of the same report and scheduling each one separately, a more efficient process is to create report views of the main report for each organization and adding the report views as steps in a scheduled job and configuring the job to run the steps in sequence. This way only one schedule is needed to run the report views and if changes need to be made to the report in the future, only the main report needs to be updated and the changes will be reflected in the report views, rather than updating multiple versions of the same report.

Sometimes there are just too many reports being scheduled to run at the same time. Know who your report authors are and coordinate to minimize collisions of large scheduled reports.

How should we organize our Scheduled Reports?

As there is no visible attribute to identify scheduled reports, it is helpful to place all scheduled reports in a "Scheduled Reports" folder. If your company prefers to separate reports based on business need/category (i.e. – Accruals, Paid Expenses, etc.), you can create a report view of the main report and schedule the report view. It's also best to minimize the number of people scheduling reports and to document who they are. Then, if they leave the company or no longer have an active Cognos role, you can identify which schedules need to be updated to use the credentials of an active Cognos user so the schedules continue to run.

What is the User-Capabilities Cache error message?

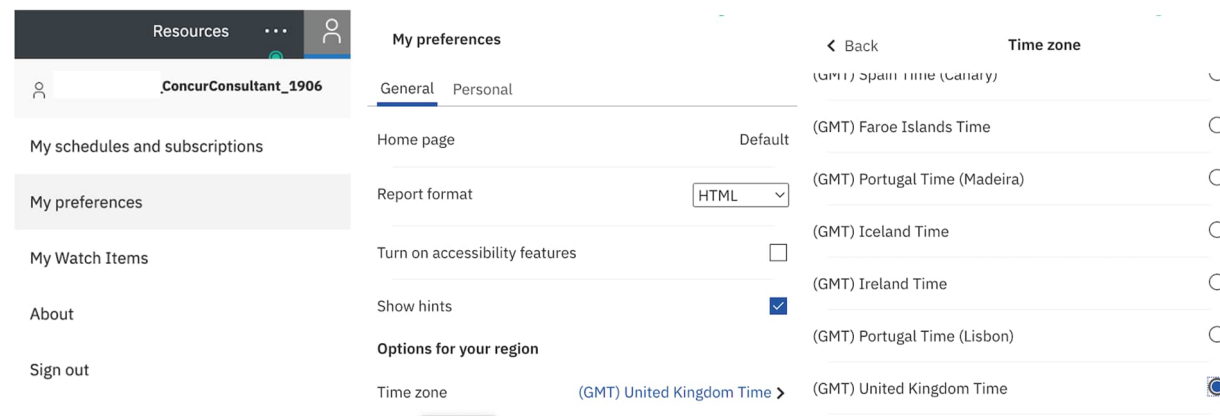
If you receive the error in the screenshot, it is most likely due to a session that was not ended properly and has resulted in corrupt files in your browser's cache. To fix this, try another supported browser or clear your browser's cache. If that does not work, close down all browser windows and then restart your browser and try again.



How do I configure time zones for Scheduled Reports?

The Cognos 10 servers were configured using the Pacific time zone. But in Cognos 11, the servers use the UTC time zone. UTC is a neutral time zone and does not change seasonally (i.e. – like Daylight Saving Time). Actions taken within the Concur system are shown in the reporting system in UTC as this allows all users to have the same point of reference without needing to know another user's specific time zone. For example, if you run a Cognos report that shows someone submitted an expense report at 1:00 PM, is that 1:00 PM your time zone or the user's time zone, and do you know the user's time zone? Having this shown in UTC allows you to make time conversions as needed without needing to know the correct time zones for other users. If your scheduled reports are running at a different time than you expect, please check your Cognos preferences time zone settings. You can change your time zone to the desired time zone and/or change the schedule time based on your Cognos preferences time zone.

Select your Profile icon at upper right > My preferences > Time zone - and your preferred option.



What values are returned with the Current Date and Current_timestamp functions?

Current Date: When using current date (along with other model columns) it will display the date from the data base time zone -which is PST.

When using current date (without other model columns) this function is processed locally and not passed to the database – so it displays the date based on the Cognos server time zone - which by default is UTC.

Current_timestamp: this function is not passed to the database, it's always processed locally by the Cognos server. The value returned is always based on Cognos server time zone.

Can I customize the “From” email address for my reports?

This was possible previously, but we found that customer reports were getting caught in their inbound email filters. A default Cognos “From” email address is now being used to provide more reliable report delivery.

Learn more at concur.com

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