10/2/2017 Meeting Minutes

Attendees: Makenzie Grover, Chris Wallace, David Wilkins, Susie Irwin
The committee met to discuss progress on the Cognos 11 items documented in our last meeting.

Susie worked with the DBAs to correct the issue with permissions on the Production folder. Chris Wallace helped to test this.
The DBAs also corrected the issue with folders showing in Reports – University of Oklahoma. Only four folders are now visible: Help, Support, Staging, Production

Roles discussion

Cognos 11 has the ability to modify the tools and options a user can view based on the user's Cognos role. This will be useful for making the interface more user friendly. It was discussed that Consumer and Author roles would be modified as noted in the items below.

Search feature discussion

Susie entered a support ticket with IBM to ask about the functionality of the Search feature. In Cognos 11, the search feature searches many elements of the reports and folders including name, description, date/time stamps. According to IBM, there is not a way to modify this functionality. This is an issue because a Search returns many reports and it is confusing as to which report is the appropriate report. The committee discussed removing the Search feature from the interface. The following was decided:

1. Remove the Search feature for Consumers.
2. Keep the Search feature for Authors. This may help authors find their individual reports. Susie will describe the search functionality in the Author documentation.

Home feature

According to IBM, you can only set a report, dashboard or Story as your Home page. You can't set a folder as 'Home'. We tested setting a report (839) as the Home page. We decided it was more difficult to navigate away from the 'Home' report to other reports. The team came to the following conclusion:

1. Keep the default Welcome Page as 'Home'.

Custom Folder Capability

Cognos 11 has the ability to create a 'Custom Folder' that is visible on the left Navigation bar under 'Team Content'. Susie created a folder 'Reports – University of Oklahoma' that will take users directly into that folder, so users do not need to navigate from Team Content. The Custom folder is created at the Cognos Role level.
The committee discussed removing the Team Content folder because when you select it you see all the Cognos Packages and the 'Reports – University of Oklahoma' folder is listed towards the bottom. We discussed if it would be useful for consumers or authors. It was determined that there is no need to keep the link to Team Content for either group. The following was decided.

1. Add 'Reports – University of Oklahoma' as a custom folder to the left navigation pane.
2. Remove 'Team Content' from the left navigation pane.
3. Research possibility of adding more than one custom folder.

Shortcut Capability

Cognos 11 has the capability to create shortcuts to folders or reports and place the shortcuts in your 'My Content' folder. You navigate to the report or folder, click the more icon and choose 'Create Shortcut'. The user then selects the location for the shortcut (Team Content or My Content).
We believe this will be a useful tool for Consumers, so they won't have to always navigate to the report or folder. To do items for this task:

1. Susie will research if there is a way to remove 'Team Content' as an option when creating the shortcut.
2. Susie will add this functionality to the existing documentation.

Additional follow-up tasks:

1. Susie will make requested modifications to user documentation and email to David to post to the Committee One Drive.