

Introduction to Business Reporting Using IBM Cognos

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Introducing Reporting

The ERP Reporting Committee selected **Cognos** as the Enterprise Reporting Tool of choice for NMSU. **Cognos** is a web-based enterprise reporting solution. **Cognos** allows you to gather data from various storage locations and assemble the data into a personalized package. **Cognos** has three parts to the system:

- Cognos Connection (the portal)
- Query Studio
- Analysis Studio

Cognos is used to view reports. Users may request new reports through the NMSU reporting portal at <http://training.nmsu.edu/documents/bfhr-data-request.pdf> . Based on report needs; Budget, Finance or HR, submit your request to the appropriate e-mail link. By providing detailed information, the request will be directed for production to the correct reporting department.

More information about Cognos can be found at <http://www.cognos.com>.

Objectives

This manual will introduce you to **Cognos Connection**, and NMSU Business, Finance and HR standard reports. The following areas will be covered:

- Getting Started in Cognos
- Managing Entries
- Personalizing the portal
- Introducing Query Studio
- Accessing Reports
- Scheduling Reports
- NMSU Business, Finance & HR Data Reporting Portal

Terminology

In this section, terms used throughout this manual and in training are defined.

In this manual we will use the following acronyms for the following reporting groups:

SIM – Student Information Management

ICT – Information & Communication Technologies

ADM –Administrative Data Management

Cognos Users

Your security is based on permission to view selected data within your individual account, and roles to which you belong. **Cognos** supports the union of access permissions. When you belong to more than one role, you have the combined permissions of all the roles to which they belong. Based on Cognos security levels, you are granted access to one or more packages.

The following roles determine the access to tools in **Cognos**:

Term	Description
Consumer	Consumers can read and execute reports in Cognos based on security. Consumers can also interact with prompts, and define output reports to other formats such as PDF and CSV. This is the most widely spread role/user in Cognos.
Query User	Query Users have the same access permissions as Consumers. They can also use Cognos Query Studio to create ad hoc queries, simple reports, and charts.
Report Author	Authors have the same access permissions as Query Users. They can also use Cognos Report Studio which provides the ability to create sophisticated, richly formatted reports and charts with complex prompts and filters. Examples of Report Authors would include members of SIM, ICT, and ADM.
Data Modeler	Data Modelers create packages that define a subset of data that is relevant to an intended group of users. Examples of Data Modelers would include members of SIM, ICT, and ADM.

Frequently Used Terms

Below is a list of terms that are specific to **Cognos** and will assist you during the training session.

Term	Description
Data Element	Describes a single aspect of each member of a data view. A student record, for instance, might contain a last name, first name, a date of birth and other data elements as well. Also known as attributes or fields.
Data View	A single store of related information containing a number of Data Elements. Also referred to simply as a View.
Framework Manager	Infrastructure organizer for Cognos: security, administration, metadata and portal.
Metadata Report	Reports of the data transferred from Banner to the Operational Data Store (ODS). Reports indicate the location stored in Banner and the location stored in the ODS.
Package	A package is a data structure or file containing imported data from one or more data sources, such as SCT Banner. It can contain models, reports, and views. Data Modelers create packages in Framework Manager to publish models to the Cognos server. Packages use NMSU's policies to define and group the data to be used for reporting.
Portal	A Web site or page that provides a single presentation and a single starting point for a set of information. Cognos Connection is the portal interface of Cognos.
Query Studio	A basic reporting tool. Is the Ad hoc query component of Cognos, it is an ideal and productive environment for users with limited technology skills.
Report Studio	Advanced reporting tools for Report Authors.

For more terms used in Cognos, please refer to **Appendix E: Glossary**.

Getting Started

In this section you will learn how to:

- Gain Access to Cognos.
- Check your browser.
- Log into Cognos.
- Use Cognos Connection.

Gaining Access to Cognos

University data must be handled responsibly. Some data may be restricted by a college, department, or cannot be released to persons outside NMSU.

Cognos is a web-based solution. No software is loaded on the desktop to run Cognos. Additionally, there is no Java plug-ins that needs to be downloaded. You will need to use your **NMSU Username** and **NMSU Password** to use **Cognos**.

For more information about restrictions on University data, please refer to **NMSU General Person Data Standards**, http://unodocs.nmsu.edu/General_Person/.

Logging into Cognos

The **Cognos Connection** web portal is a single point of access to all **Cognos** content. The portal is used to store and access reports. With the necessary permissions, you can also use the portal for report administration, including scheduling and distributing reports. Administrators use the portal to administer servers, optimize performance, and set access permissions. **Cognos Connection** is also used to manage and distribute your reports.

There may be settings that need to be modified in your Browser to allow users to properly view reports in Cognos, see **Appendix A**.

Cognos supports authenticated user access. To use **Cognos** as an authenticated user, you must successfully login by providing your credentials, **NMSU Username** and **NMSU Password**.

The following steps you through the process for logging into Cognos.

1. Open a browser session.
2. Type the **URL: <http://cognos-p.nmsu.edu>**

Team Tip: Create a bookmark in your browser for quick access to Cognos Connection.

NEW MEXICO STATE UNIVERSITY

Please type your credentials for authentication.

Namespace:
NMSU LDAP

User ID:

Password:

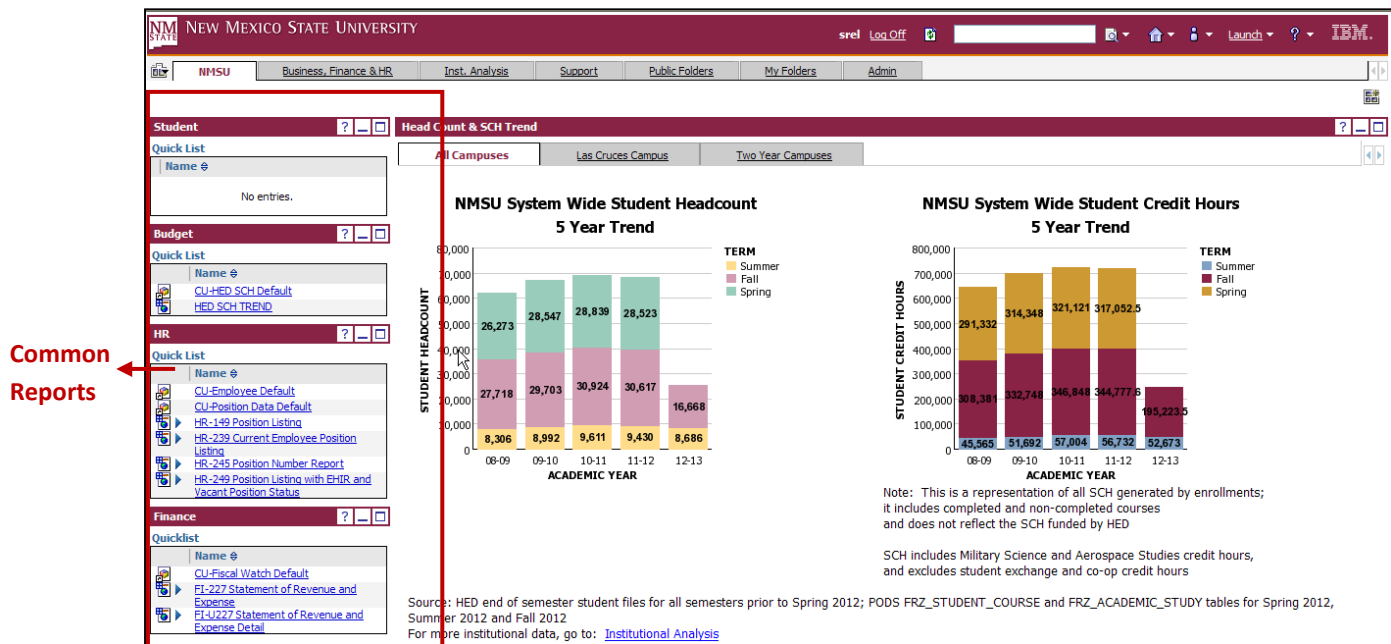
Login Cancel

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3. Type your NMSU Username (email address before the @ sign) and NMSU Password.
4. Select **OK**.
The NMSU tab is displayed.
The NMSU tab is a compilation of all data areas, listing some of the more accessed reports.

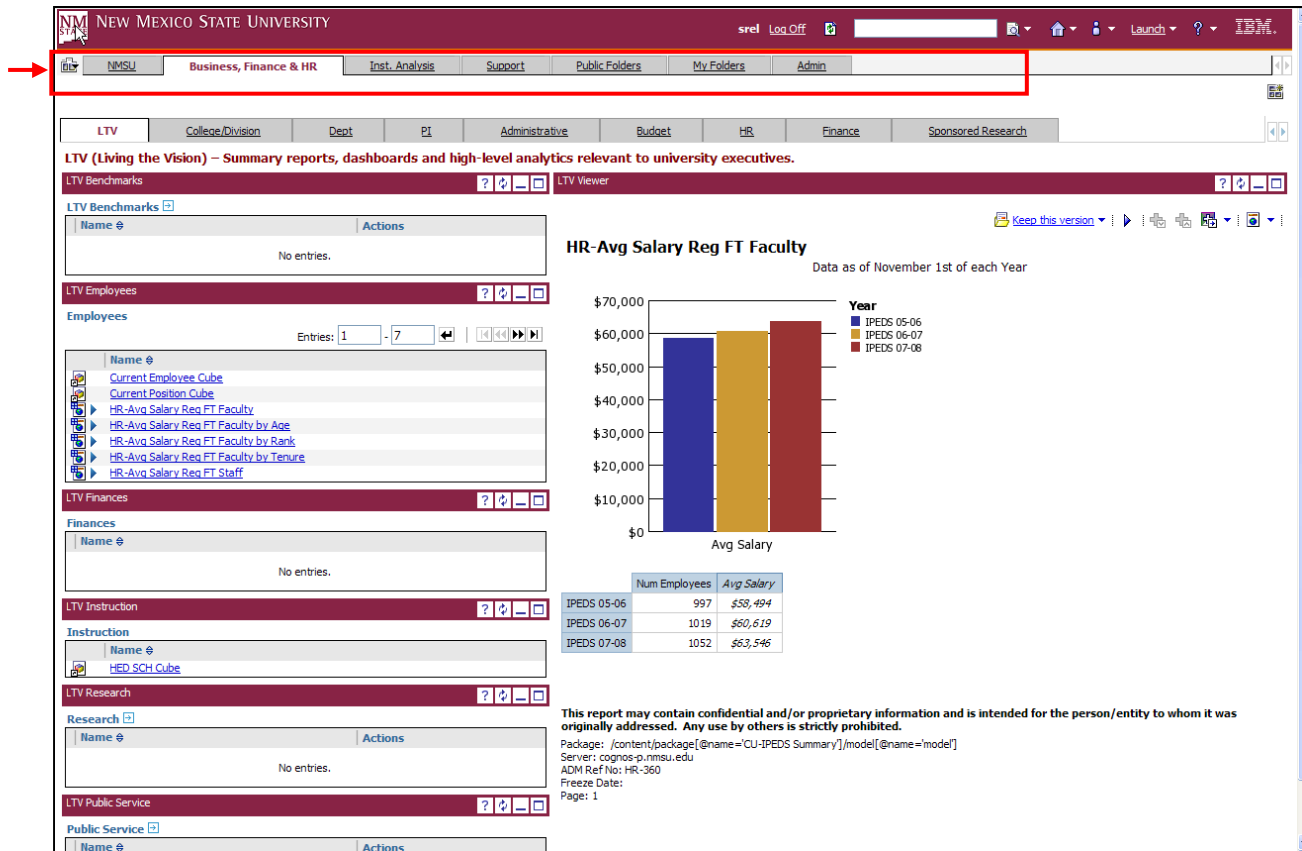
Using Cognos Connection

Cognos Connection is separated by tabs. The tab that will first open is the NMSU tab. The NMSU tab has the main portlets on the left side, based on your individual security. These portlets list some common reports that you may access from this entry page.



For those individuals interested in Business data, we recommend you use the Business, Finance & HR tab to access the standard reports that are available.

Through the **Business, Finance & HR** tab there are sub tabs available; LTV, College/Division, Dept, PI, Administrative. These tabs are a simple way to navigate to the type of data/reports needed.



LTV tab – Provides summary reports, dashboards and high-level analytics relevant to university executives.

College/Division tab – Provides list of BFHR standard reports that can be run for users specific College or Division. You will also have the capability to run reports listed but select another College or Division.

Dept tab – Provides list of BFHR standard reports that can be run for user's specific Dept. The ability to run reports but select another department is also available.

PI tab – Provides a Principle Investigator a list of filtered reports listing information identified by Principle Investigator.

Administrative tab – Provides list of BFHR standard reports filtered options for greater flexibility to address specific needs.

Note: Though others visible Budget, HR, Finance & SPA we recommend the use of four primary tabs (College/Division, Dept., PI, Administrative) listed above.

Public Folders

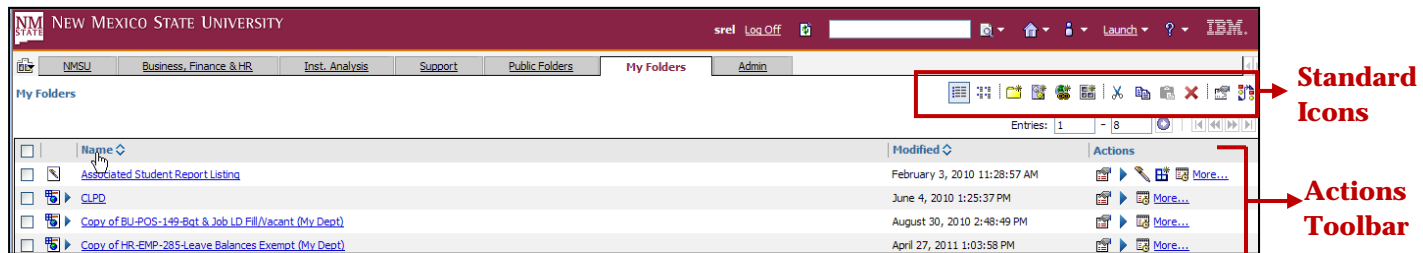
Public Folders contain reports relevant to many users. In **Public Folders**, data is grouped in packages or other folders. In **Public Folders** there is a subfolder named **ALL REPORTS** that contains the shared reports at NMSU. **ALL REPORTS** is structured with internal and external folders for NMSU such as: Administrative, College/Division, Dept. etc. Under **ALL REPORTS** folder you will see additional folders, **Administrative**, **College/Division** etc (these are the tabs displayed under Cognos connection). When drilling down in a folder you will see additional folders such as **Employees**, **Finances** etc (these are the portlets under each tab). Drill down further and you will see a list of all reports that are available from the **Business Finance & HR** tab.

My Folders

Reports that are placed in **My Folders** are personalized. These folders allow you to customize, organize and save reports specific to you. You can also add new folders to create a hierarchy for more levels of organization.

Navigating My Folders

In the **My Folders** tab, reports are organized into folders.



Actions Toolbar -



The Actions Toolbar allows you to choose a specific action to be applied to the package, folder, or report.

Folder -



A folder is used to organize reports. Having folders that are logically labeled and organized helps the user to easily locate reports.

Package -



A package is a container for **reports**, **views**, and **data elements**. Packages are created by the Reporting Group and published to the **Cognos** Server.

Standard Icons -



Standard icons are pictorial representations of commonly used commands.

Report View -



A reference to another report that has its own properties, such as prompt values, schedules, and results.

Shortcut -



A link to the original report or report view.


Report -

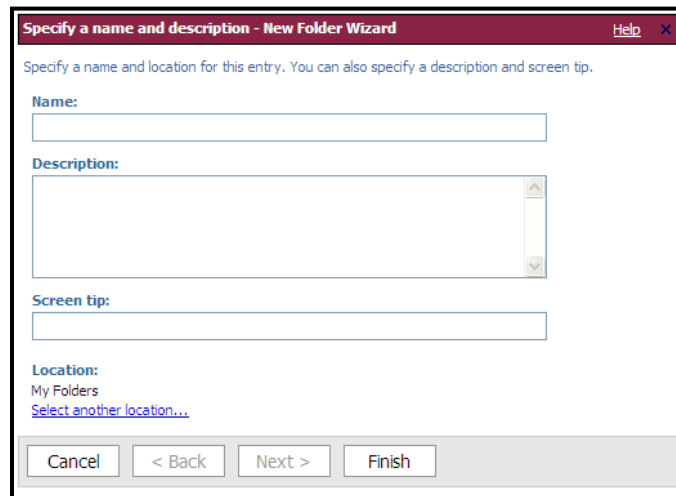


Report is the output created.

Create a New Folder

The following steps you through the process of creating a new folder.

1. Choose the **My Folders** tab.
2. Click the **New Folder** icon  on the portal toolbar.



Specify a name and description - New Folder Wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:

Description:

Screen tip:

Location:
My Folders
[Select another location...](#)

Cancel < Back Next > Finish

3. Type the name of the new folder in the **Name** field. (required)
4. Type a **Description** and/or a **Screen Tip** in the appropriate fields. (optional)

Note: The Description of the folder appears in the portal when you set your preferences to use the details view. The Screen Tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

5. From the **Location** select the appropriate folder if it is not already the default.
6. Click **Finish**.

Accessing Reports

Through **Cognos Connection** you can access the reports that have been previously created and saved. Running the report is accessing a report to retrieve the predefined data.

Run an Existing Report

To view a report using the most recent data or report design, you can run the report by clicking the report name in the portal.

The following instructions step you through the process of running an existing report.

1. Select the valid **Tab** (Business, Finance & HR).
Portlets will be displayed showing all reports available for selection.

Portlet

NEW MEXICO STATE UNIVERSITY

srel Log Off

Business, Finance & HR Inst. Analysis Support Public Folders My Folders Admin

LTV College/Division Dept PI Administrative Budget HR Finance Sponsored Research

College/Division – BHR reports that can be run for your specific College/Division (My) or you can choose to run reports for any College/Division (All).

My Employees All Employees Shared Folders

Employees Employees All Shared Folders

Entries: 1 - 5

Name

- BU-POS-149-Bgt & Job LD Fill/Vacant (My Coll/Div)
- BU-POS-249-Vacancy & EHR Status (My Coll/Div)
- HR-EMP-285-Leave Balances Exempt (My Coll/Div)
- HR-EMP-285-Leave Balances NonExempt (My Coll/Div)
- HR-EMP-321-Employee by Primary Job (My Coll/Div)

My Finances All Finances

Finances Finances

Entries: 1 - 5

Name

- BU-YTD-Rest Detail for Bgt Prep (My Coll/Div)
- BU-YTD-Rest Summary for Bgt Prep (My Coll/Div)
- BU-YTD-Unrestricted Fund Detail (My Coll/Div)
- BU-YTD-Unrestricted Fund Summary (My Coll/Div)
- FI-COA-Index List (My Coll/Div)

My Instruction All Instruction

Instruction Instruction

Entries: 1 - 5

Name

- BU-SCH-By Course Dept by Fac Dept (My Coll/Div)
- BU-SCH-By Course Dept by Instr Type (My Coll/Div)
- BU-SCH-By Course Dept by Instructor (My Coll/Div)
- BU-SCH-By Course Discipline (My Coll/Div)
- BU-SCH-By Fac Dept by Course Dept (My Coll/Div)

My Research All Research

Research Research

Entries: 1 - 5

Name


- RA-SPA-Award/Contract Billing Summary (My Coll/Div)
- RA-SPA-Expiring Funds (My Coll/Div)
- RA-SPA-Grant Activity by Agency (My Coll/Div)
- RA-SPA-Grant Activity by Org (My Coll/Div)

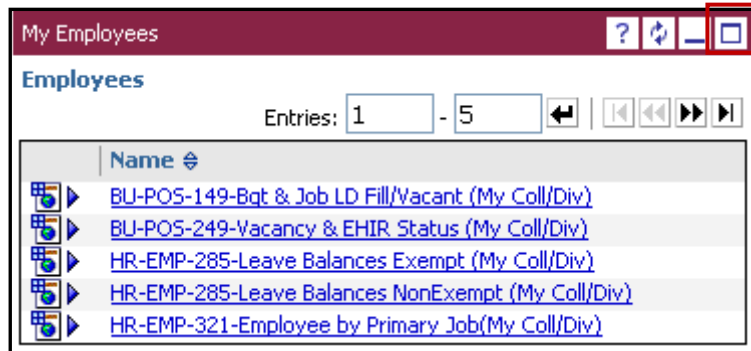
2. Select the report by clicking on the **Report Name**.

Run an Existing Report with Options

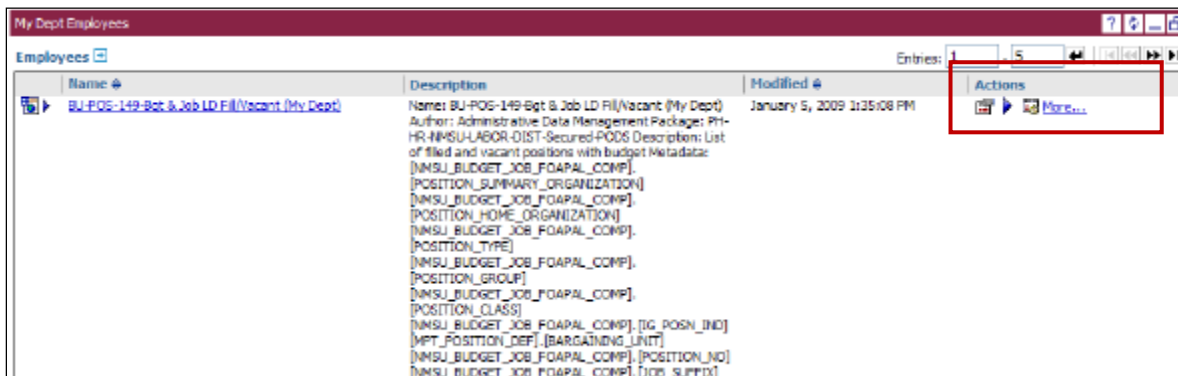
Running a report with options allows you to specify a format, schedule the report, and distribute the report.


The following instructions guide you through the process of running an existing report with options.

1. In order to view the options available, the portlet must be maximized to view the Actions menu. To maximize the portlet, click on the **maximize**  icon located on the right hand corner of the portlet.



2. The portlet will be maximized and the Actions menu will be displayed to the right.



3. Under the Actions menu click the **Run with options**  icon from the Actions toolbar to the right of the report you want to run.

Run with options - BU-POS-149-Bgt & Job LD Fill/Vacant (My Coll/Div)

Help

Select how you want to run and receive your report.

Format:

HTML

Accessibility:

☐ Enable accessibility support

Language:

English

Delivery:

☒ View the report now

☐ Print the report:

Printer location:

Select a printer...

☐ Send me the report by email

Prompt values:


No values saved

☒ Prompt for values

Run

Cancel

To specify a time to run the report, or for additional formats, languages, or delivery options, use [advanced options](#).

4. Select the following that apply:
 - a. Format
 - b. Language
 - c. Delivery
 - d. Prompt Values
5. To return the portlet to its original view, it must be restored. To restore the portlet, click on the **restore**  icon displayed to the right of the portlet.


Name	Description	Modified	Actions
BU-PGS-149-Rpt & Job LD Fill (Vacant (My Dept)	<p>Name: BU-PGS-149-Rpt & Job LD Fill (Vacant (My Dept)</p> <p>Author: Administrative Data Management Package: PHS-HRS-LABOR-DIST-Secured-PODS</p> <p>Description: List of filled and vacant positions with budget Metadata:</p> <p>[NNSU_BUDGET_JOB_FOAPAL_COMP]</p> <p>[POSITION_SUMMARY_ORGANIZATION]</p> <p>[NNSU_BUDGET_JOB_FOAPAL_COMP]</p> <p>[POSITION_HOME_ORGANIZATION]</p> <p>[NNSU_BUDGET_JOB_FOAPAL_COMP]</p> <p>[POSITION_TYPE]</p> <p>[NNSU_BUDGET_JOB_FOAPAL_COMP]</p> <p>[POSITION_GROUP]</p> <p>[NNSU_BUDGET_JOB_FOAPAL_COMP]</p> <p>[POSITION_CLASS]</p> <p>[NNSU_BUDGET_JOB_FOAPAL_COMP] [IG_POSN_IND]</p> <p>[MPT_POSITION_DEF] [BARGAINING_UNIT]</p> <p>[NNSU_BUDGET_JOB_FOAPAL_COMP] [POSITION_IND]</p> <p>[NNSU_BUDGET_JOB_FOAPAL_COMP] [JOB_SUPP1]</p>	January 5, 2009 11:35:08 PM	More...

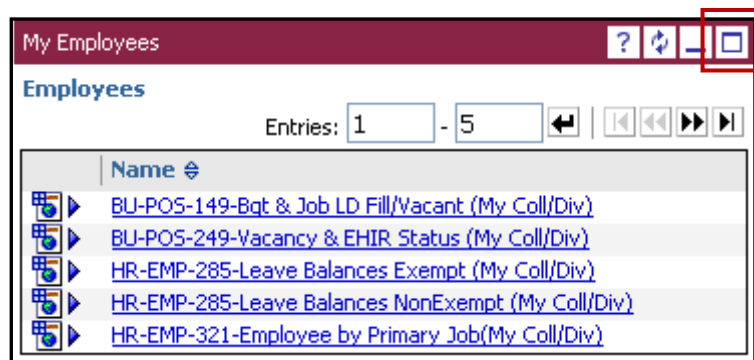
Advanced Options

You can specify the following advanced run options for a report for the current run:

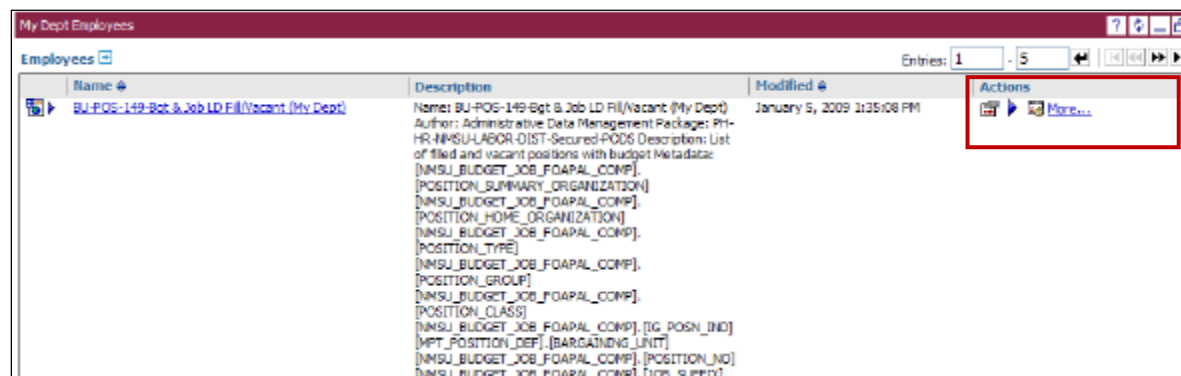
- Time when the report should run.
- Multiple report output formats if you choose to run the report later.
- One or more delivery methods.
- Prompt for values.


The report runs in the background. If you run the report later, select multiple report formats, select to save, print, or email the report. When done, the output versions button appears next to the report on the **Actions** toolbar.

1. In order to view the options available, the portlet must be maximized to view the Actions menu. To maximize the portlet, click on the **maximize**  icon located on the right hand corner of the portlet.




2. The portlet will be maximized and the Actions menu will be displayed to the right.



3. Under the Actions menu click the **Run with options**  icon from the Actions toolbar to the right of the report you want to run.

5. Select Advanced Options link.
6. Select the following that apply:
 - **Time and Mode** - Indicates if the report is to run now or for a scheduled later date.
 - **View the Report Now** - Will display the report in a new window.
 - **Run Report in Background** - Will e-mail or schedule the report. This will add other selection criteria to complete delivery.
 - **Format** - Provides a choice for the report format. Recommended formats include Excel 2002, Excel 2007, CSV, and PDF.
 - **Languages** - Provides a choice in the language a report is produced.
 - **Accessibility** - Enabling Accessible Report Output. (It is not recommended to select this option, as the size of the report will be modified and may affect report performance. If there is a need for this feature please contact *Administrative Data Management* reporting group).
 - **Delivery** - Allows you to view, save, print, or e-mail the report.
 - **Prompt Values** - Allows you to define the values displayed of the predefined filter each time the report is run.

7. Click **Run**.
8. To return the portlet to its original view, it must be restored. To restore the portlet, click on the **restore**  icon displayed to the right of the portlet.


Name	Description	Modified	Actions
BU-POS-149-Bgt & Job LD Fill/Vacant (My Dept)	Name: BU-POS-149-Bgt & Job LD Fill/Vacant (My Dept) Author: Administrative Data Management Package: PHR-NMSU-LABOR-DIST-Secured-PODS Description: List of filled and vacant positions with budget Metadata: [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_SUMMARY_ORGANIZATION], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_HOME_ORGANIZATION], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_TYPE], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_GROUP], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_CLASS], [NMSU_BUDGET_JOB_FOAPAL_COMP], [IG_POSN_IND], [MPT_POSITION_DEF], [BARGAINING_UNIT], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_NO], [NMSU_BUDGET_JOB_FOAPAL_COMP], [JOB_SUPP]	January 5, 2009 11:35:08 PM	Print, More...

E- mailing the Report

From the **Delivery** section you can have the report **e- mailed** to you and other NMSU constituents.

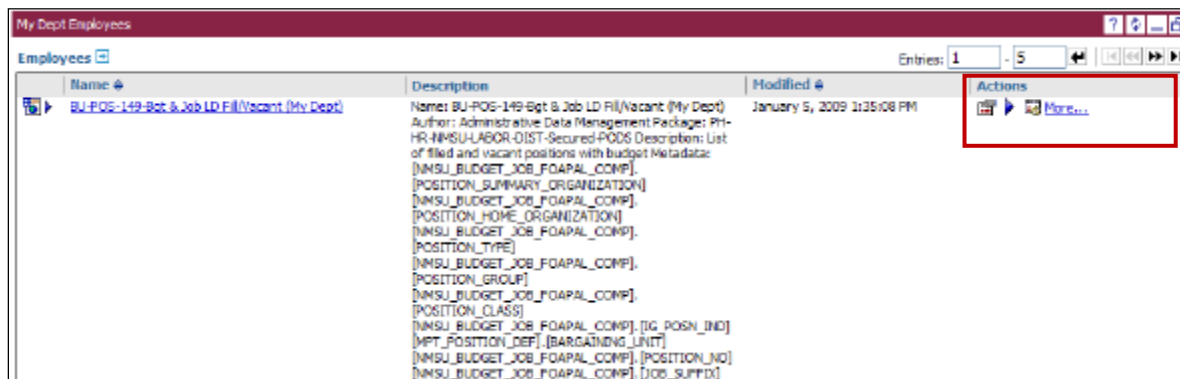
If you choose to e-mail the report, it is suggested that you:


- Change the email format to **Plain Text**
- Always ensure that you **Attach the Report** instead of including it as a link.
- Recommend you include text in the **Body** field box so it will attach to the email.

1. In order to view the options available, the portlet must be maximized to view the Actions menu. To maximize the portlet, click on the **maximize**  icon located on the right hand corner of the portlet.



2. The portlet will be maximized and the Actions menu will be displayed to the right.



3. Under the Actions menu click the **Run with options**  icon from the Actions toolbar to the right of the report you want to run.

4. Click the **Advanced Options** link.
5. From the **Time and Mode** section, select **Run in the background** and then select **Later**.
6. If you want the report e-mailed immediately select **Now**. If you want to schedule the report to be e-mailed select **Later** and select a date and time.
7. From the **Delivery** section, select the check box next to **Send the Report by Email** and click the **Edit the Options...** link.

Run with advanced options - BU-POS-149-Bgt & Job LD Fill/Vacant (My Coll/Div) 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:

May 21, 2012

9 : 26 AM

Options

Formats:

☒ HTML

Number of rows per Web page: 20

☒ Enable selection-based interactivity

☐ PDF

No options saved

[Set...](#)

☐ Excel 2007

☐ Excel 2002

☐ Delimited text (CSV)

☐ XML

Accessibility:

☐ Enable accessibility support

Delivery:

Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.

☐ Print the report

Printer location: [Select a printer...](#)

☐ Send the report by email [Edit the options...](#)

srel (srel)

The **Email Options** window displays.

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To: srel (srel);

Cc:

Select the recipients... Show Bcc

Subject: Report: BU-POS-149-Bgt & Job LD Fill/Vacant (My Coll/Div)

Body: Change to plain text >>

☐ Include a link to the report

☒ Attach the report

OK Cancel


8. Complete the Email window with any pertinent information

9. Click **OK**.

The **Run with options** page displays.

10. Click **Run**.


Note: If you selected the Prompt for values checkbox, you will now be prompted with the criteria for the filter.

11. To return the portlet to its original view, it must be restored. To restore the portlet, click on the **restore**  icon displayed to the right of the portlet.

My Dept Employees

Employees

Entries: 1 - 5

Name	Description	Modified	Actions
BU-POS-149-Bgt & Job LD Fill/Vacant (My Dept)	Name: BU-POS-149-Bgt & Job LD Fill/Vacant (My Dept) Author: Administrative Data Management Package: P1-HR-NMSU-LABOR-DIST-Secured-PODS Description: List of filled and vacant positions with budget Metadata: [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_SUMMARY_ORGANIZATION]. [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_HOME_ORGANIZATION]. [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_TYPE]. [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_GROUP]. [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_CLASS]. [NMSU_BUDGET_JOB_FOAPAL_COMP].[IG_POSN_IND]. [MPT_POSITION_DEF].[BARGAINING_UNIT]. [NMSU_BUDGET_JOB_FOAPAL_COMP].[POSITION_NO]. [NMSU_BUDGET_JOB_FOAPAL_COMP].[JOB_SUPPLX].	January 5, 2009 1:35:08 PM	 More...

Formatting Reports

The report format can be specified on the **Run Report** menu, in the report properties, or in your preferences. When you run a report, the format specified in the report properties is used. When it is not specified in the report properties, the format specified in your preferences is used.

If you run a report by clicking the **Run with Options** icon, you can change the format selected by default or select additional formats. If you run a report by clicking the report name link, the format selected by default cannot be changed.

You can choose the output format for a report. You may want to view reports in a browser, or you may want the report in a format that is easily imported into another application.

You can choose from the following formats:

Common Report formats


- **HTML** – best used to view a report on the computer as a web page.
- **Excel 2002**– best used to manipulate the report data.
- **Excel 2007**– best used to manipulate the report data.
- **Delimited text (CSV)** – best used to manipulate the report data.
- **PDF** – best used to print the report.

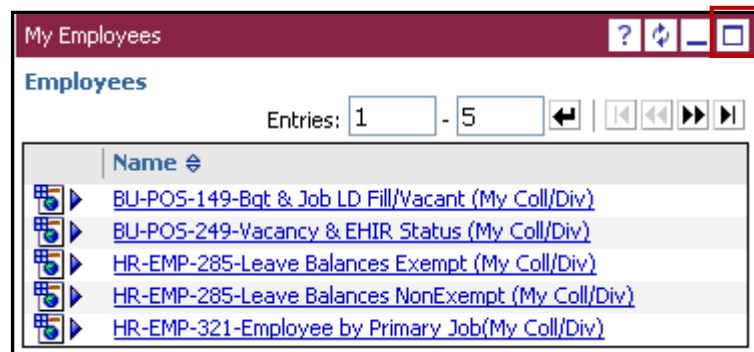
Other Report Formats

- HTML fragment
- XHTML
- XML

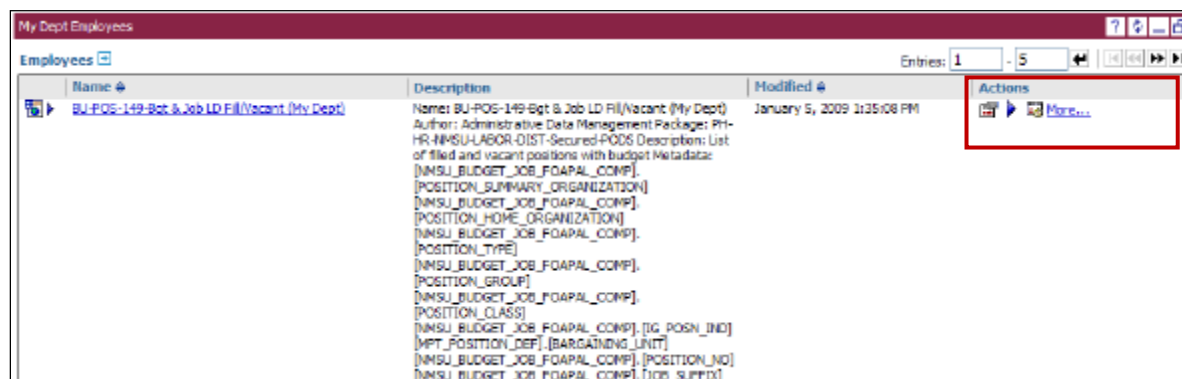
Specify a Format for a Report


You can specify a format by changing the run options when the report is run.

1. In order to view the options available, the portlet must be maximized to view the Actions menu. To maximize the portlet, click on the **maximize**  icon located on the right hand corner of the portlet.



2. The portlet will be maximized and the Actions menu will be displayed to the right.



3. Under the Actions menu click the **Run with options**  icon from the Actions toolbar to the right of the report you want to run.

Run with options - BU-POS-149-Bgt & Job LD Fill/Vacant (My Coll/Div) Help

Select how you want to run and receive your report.

Format:
HTML

Accessibility:
☐ Enable accessibility support


Language:
English



Delivery:
☒ View the report now
☐ Print the report:
 Printer location: [Select a printer...](#)
☐ Send me the report by email





Prompt values:
 No values saved
☒ Prompt for values





4. From the **Format** menu select the desired format.
5. Click **Run**.

Note: The output cannot be changed if the report is run by clicking the report name.

6. To return the portlet to its original view, it must be restored. To restore the portlet, click on the **restore**  icon displayed to the right of the portlet.

My Dept Employees ?  

Employees Entries: 1 - 5    

Name	Description	Modified	Actions
 BU-POS-149-Bgt & Job LD Fill/Vacant (My Dept)	Name: BU-POS-149-Bgt & Job LD Fill/Vacant (My Dept) Author: Administrative Data Management Package: PH- HR-NMSU-LABOR-DIST-Secured-PODS Description: List of filled and vacant positions with budget Metadata: [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_SUMMARY_ORGANIZATION]. [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_HOME_ORGANIZATION]. [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_TYPE]. [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_GROUP]. [NMSU_BUDGET_JOB_FOAPAL_COMP]. [POSITION_CLASS]. [NMSU_BUDGET_JOB_FOAPAL_COMP].[IG_POSN_IND]. [MPT_POSITION_DEF].[BARGAINING_UNIT]. [NMSU_BUDGET_JOB_FOAPAL_COMP].[POSITION_NO]. [NMSU_BUDGET_JOB_FOAPAL_COMP].[JOB_SUPPDX]	January 5, 2009 1:35:08 PM	   More...

Managing Entries

Organize Entries Cognos refers to the items in Public Folders or My Folders as entries. Entries can be a package, model, report, report view, or data source. Entries can also refer to other entries.

You can control the way an entry appears and behaves by modifying its properties. The properties for entries vary depending upon the type of entry selected. For example, reports have properties to control run options while folders do not.

If a property is not applicable to the type of entry you are customizing, it will not appear in the Set Properties dialog box.

In this section you will learn how to:

- Organize Entries
- Delete an Entry
- Create a Shortcut
- Create a Report View

Organize entries in a meaningful way so that you can easily find reports, files, or Web sites. You can move or delete reports and folders. You can also create copies of reports and store them in multiple folders.

It is important to plan how you can best organize entries in the portal. Review the entries and attempt to group them in a logical way. Consider grouping the entries by type or frequency of use.

Before you rename, delete, or move entries, consider the following information. An entry often refers to another entry. These references are hard-coded in the specification for the entry. Therefore, if you rename, delete, or move a referenced entry, the entries that refer to this renamed entry may no longer run properly.

For example, if you rename or delete a report, shortcuts and report views that refer to this report will no longer run. Also, if you rename or delete a package or data source, reports that refer to the package or data source will no longer run.

You may decide to create a folder hierarchy by using nested folders. The folder structure should be logical and should support the chosen method of grouping.


Use meaningful names and detailed descriptions to identify entries in the portal.

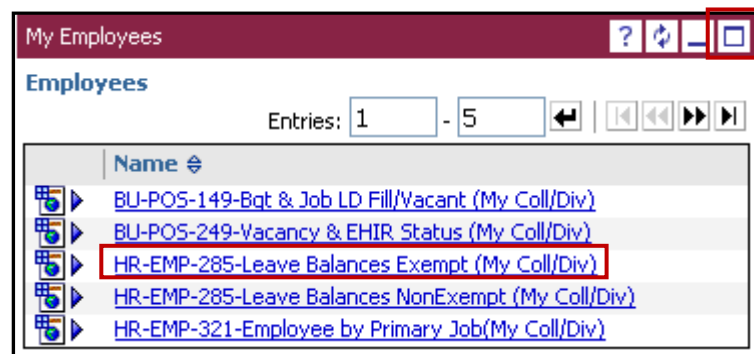
Copy an Entry

When you create a copy of an entry, you create a replica of that report in another location in the portal. When you make changes to a report in one folder, those changes are not reflected in copies of the report in other folders.

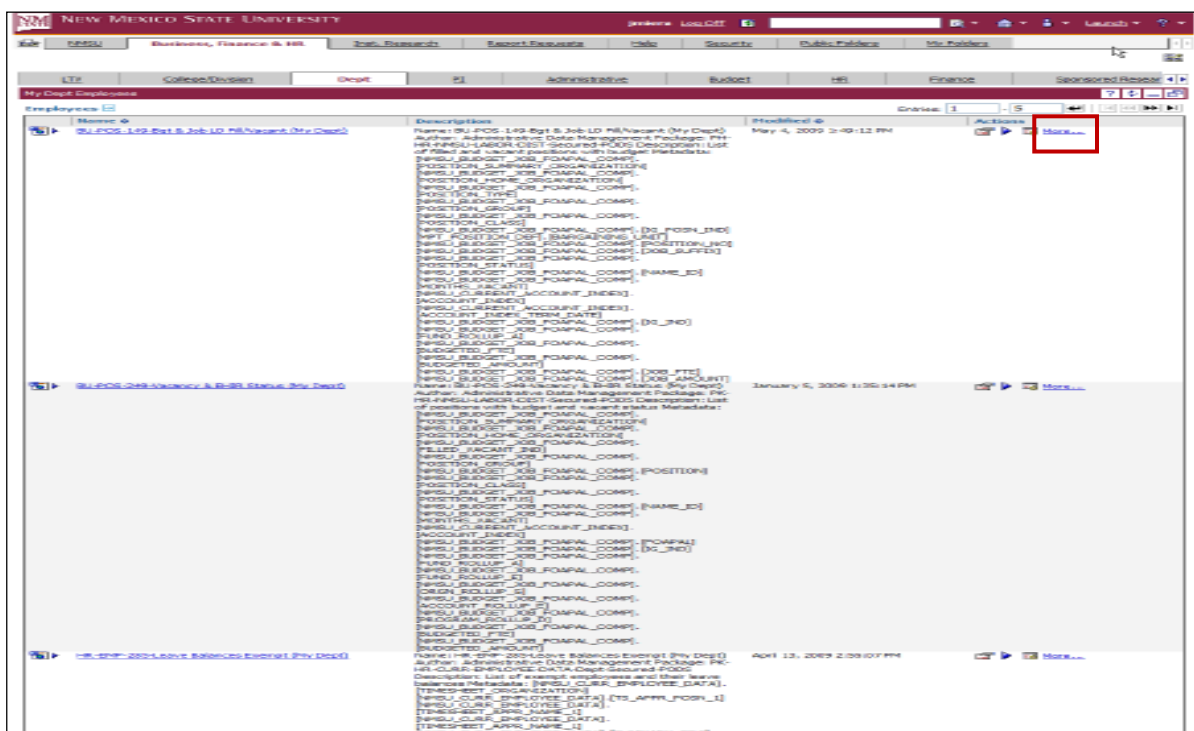
You can copy multiple entries at the same time to the same location.

The following steps you through the process of copying a single entry.

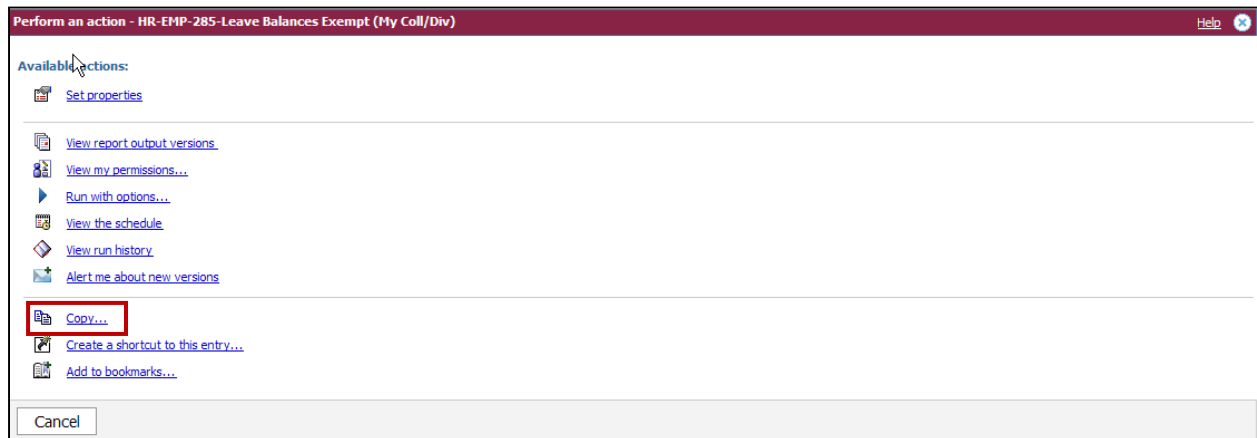
1. Select the appropriate **Tab** (Business, Finance & HR).
2. From one of the portlets locate the report view you would like to copy. Example: **HR- EMP- 285- Leave Balance Exempt.**
3. Maximize the portlet by Clicking the **maximize**  icon located on the right hand corner of the portlet.




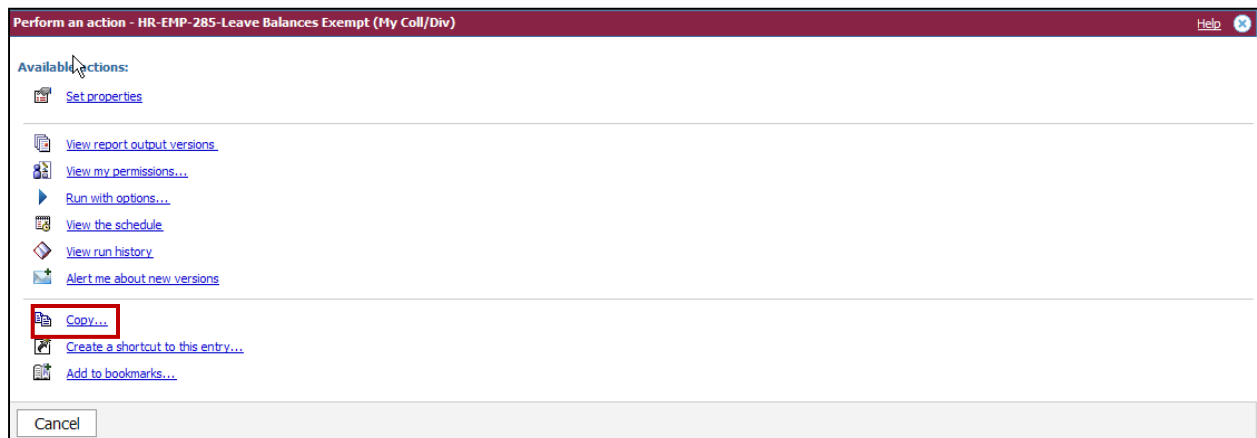
4. Click the **More...** link next to the report that you want to copy.




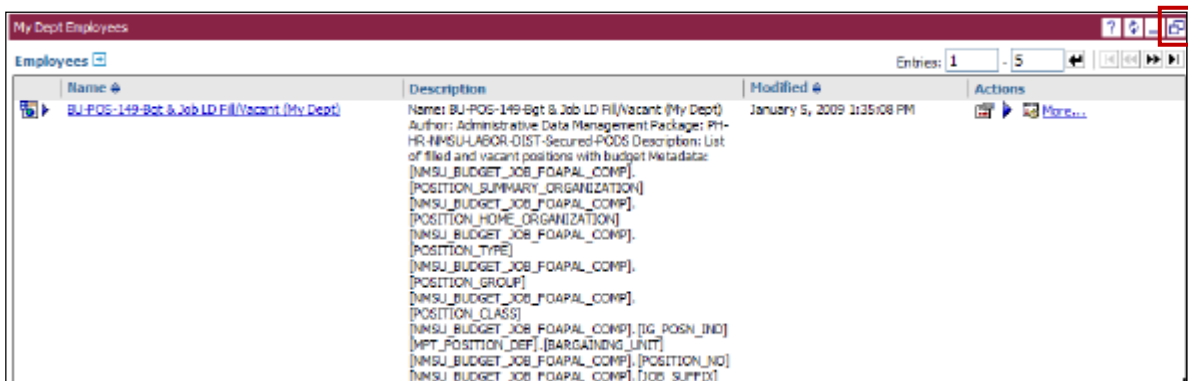
The **Perform an Action** page displays.



5. Click the **Copy** button  .
The Save as a Copy page displays.



6. In the **Name** box, you can edit the name of the new entry.
7. Click **OK**.
8. To return the portlet to its original view, it must be restored. To restore the portlet, click on the **restore**  icon displayed to the right of the portlet.



Create a Shortcut


You can use shortcuts to organize information that you use regularly. A shortcut is a path to another entry such as a report, report view, folder, job, or URL. For example, if you frequently use a report in **Public Folders**, you can create a shortcut in **My Folders**.

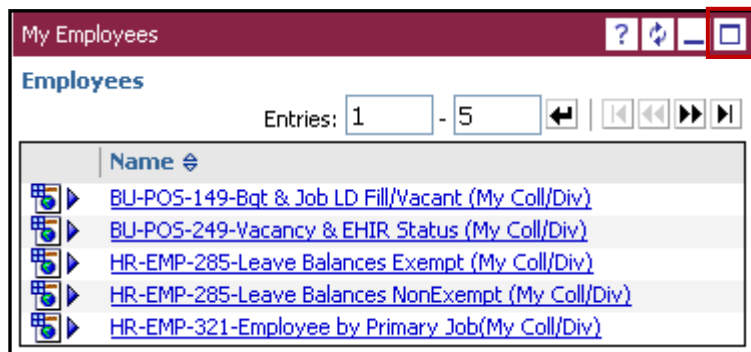
If you want to make a new report, it might be easier to make a copy of an existing report and modify it. If you want to run an existing report but you want to change the format, language, or delivery method, create a report view.

You cannot update the source entry by clicking the shortcut. However, updating the source automatically updates all shortcuts to the entry.

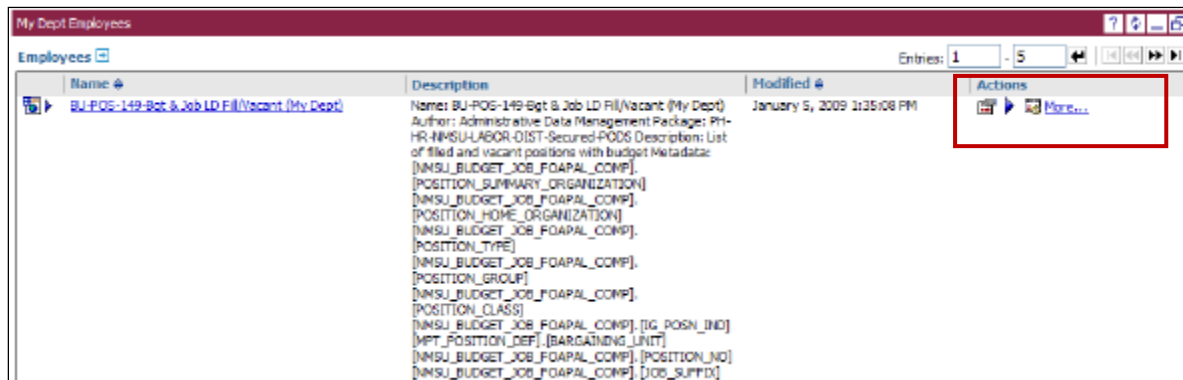
Note: If the source report was deleted or moved to another location, the shortcut icon changes to indicate a broken link, and the properties link to the source report is removed. You can change access permissions for a shortcut entry, but it does not change the access permissions for the source entry.

Instructions

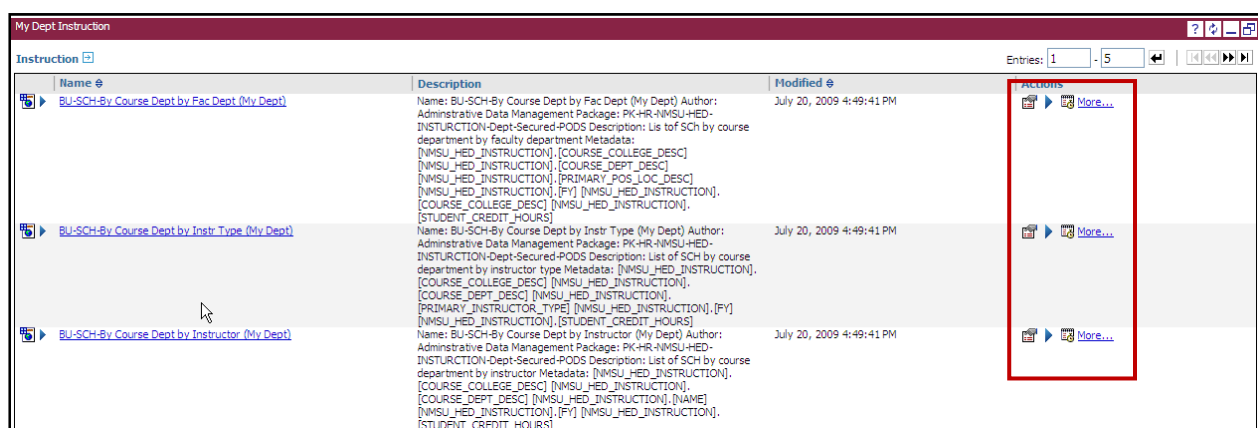
1. Select the appropriate **Tab** (Business, Finance & HR).
2. In order to view the options available, the portlet must be maximized to view the Actions menu. To maximize the portlet, click on the **maximize**  icon located on the right hand corner of the portlet.



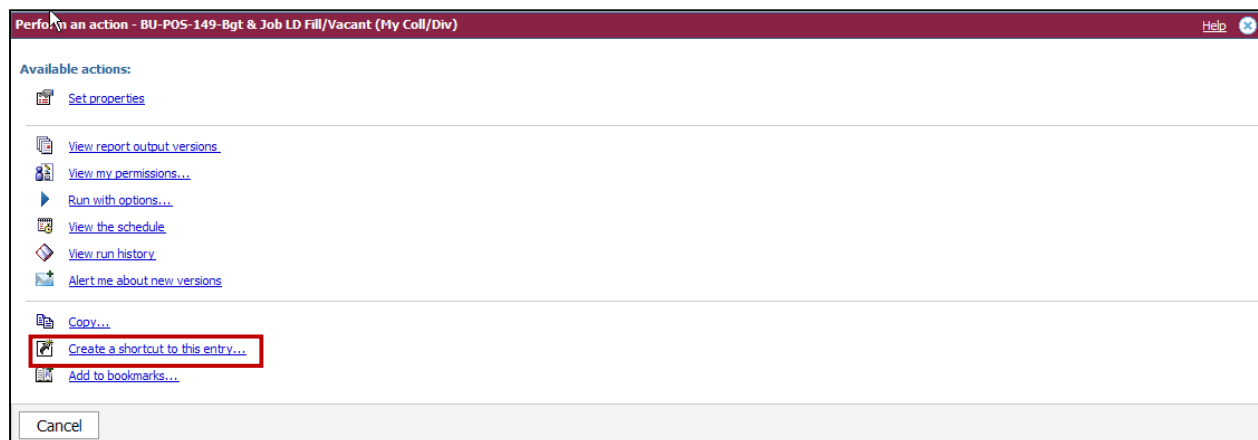
3. The portlet will be maximized and the Actions menu will be displayed to the right.



4. From one of the portlets, locate the report view you would like to copy.



5. Click the **More...** link next to the report that you want to create a shortcut for. The **Perform an Action** page displays.



6. Click Create a Shortcut to this Entry 

Specify a name and description - New Shortcut wizard Help

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:
 Shortcut to BU-POS-149-Bgt & Job LD Fill/Vacant (My Coll/Div)

Description:
 Description:
 Name: BU-POS-149-Bgt & Job LD Fill/Vacant (My Coll/Div)
 Author: Administrative Data Management Package: PH-HR-NMSU-
 LABOR-DIST-Secured-PODS Description: List of filled and vacant
 positions with budget Metadata:

Screen tip:


Location:
 My Folders
[Select another location...](#)


Cancel < Back Next > Finish

7. In the **Name** box, type the name of the shortcut.
8. If you want, in the **Description** and in the **Screen Tip** box, you can type a description of the entry.


Note: The description appears in the portal when you set your preferences to use the details view. The screen tip, which is limited to 100 characters, appears when you pause your mouse pointer over the icon for the entry in the portal.




9. Click the **Select My Folder** link.
10. Click **Finish**.

Note: In the portal, shortcut entries are identified by the shortcut icon .

11. To return the portlet to its original view, it must be restored. To restore the portlet, click on the **restore**  icon displayed to the right of the portlet.


My Dept Employees

Employees  Entries: 1 - 5

Name	Description	Modified	Actions
 BU-POS-149-Bgt & Job LD Fill/Vacant (My Dept)	Name: BU-POS-149-Bgt & Job LD Fill/Vacant (My Dept) Author: Administrative Data Management Package: PH-HR-NMSU-LABOR-DIST-Secured-PODS Description: List of filled and vacant positions with budget Metadata: [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_SUMMARY_ORGANIZATION], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_HOME_ORGANIZATION], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_TYPE], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_GROUP], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_CLASS], [NMSU_BUDGET_JOB_FOAPAL_COMP], [IG_POSN_IND], [MPT_POSITION_DEF], [BARGAINING_UNIT], [NMSU_BUDGET_JOB_FOAPAL_COMP], [POSITION_NO], [NMSU_BUDGET_JOB_FOAPAL_COMP], [JOB_SUFFIX]	January 5, 2009 1:35:08 PM	  More...

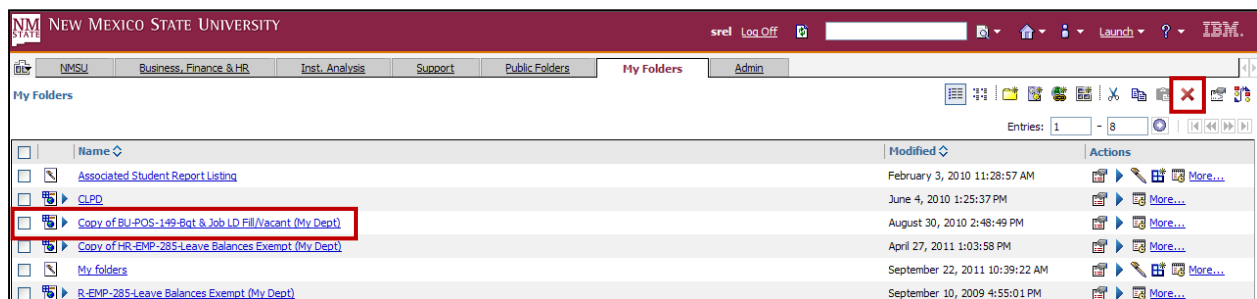
Delete an Entry

When you delete an entry, you permanently remove it from the portal. You may decide to delete an entry because it is outdated or may no longer satisfy your requirements.

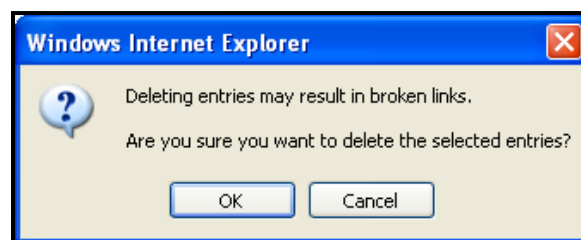
Deleting the source entry for a shortcut removes only the source entry. The shortcut entries remain but have an invalid reference icon  and are not accessible. Deleting a shortcut or a report view removes only the selected entry and not the source entry.

Instructions

1. In **My Folders**, select the check boxes next to the entries you want to delete.



2. Click the **Delete** button  on the toolbar.
A confirmation box appears.



3. Click **OK**.

Scheduling Reports

You can schedule reports to run at a time that is convenient for you, such as during off hours or when demands on the system are low. When you schedule a report, you can have the report printed, e-mailed, or saved.

You can schedule reports individually or in a group by using a print job. You can schedule reports to run by minute, hourly, daily, weekly, monthly, or yearly.

Only one schedule can be associated with each report or job. If you require multiple schedules for the same report, you can create report views and then create a schedule for each report view. Jobs have their own schedules, and these schedules are independent from report schedules.

After you create a schedule, the report or job runs at the time and date specified. You can then manage the properties of your schedules.

Prompts in Scheduled Reports

If a report that contains prompts is scheduled, you must save the prompt values or specify default values to ensure that values exist when the report runs according to the schedule.

In a job, you can specify prompt values for job steps. When a report runs as part of a job, the prompt values saved in the job definition are used instead of the values saved with the report. If no values are specified in the job definition, **Cognos** uses the values saved in the report.

Schedule a Report

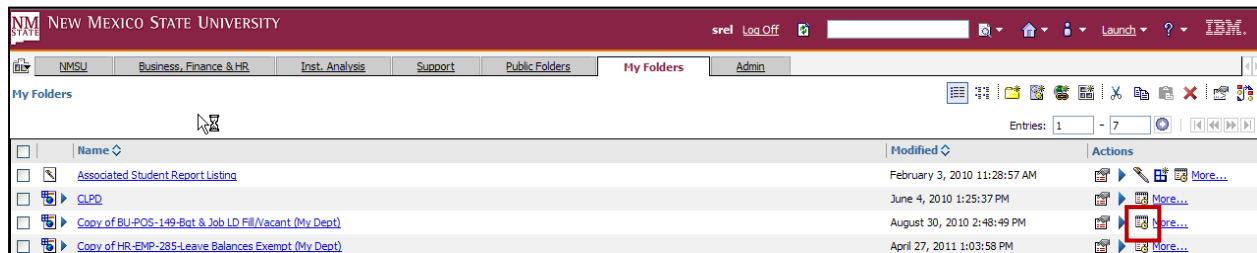
You schedule a report to run it at a later time or at a recurring date and time.


If you no longer need a schedule, you can delete it. You can also disable your report without losing any of the scheduling details. For example, you can interrupt or cancel (disable) a scheduled report and then decide to run (enable) the schedule at a later time.

Cognos keeps history information and report outputs each time a report runs according to a schedule. You can specify how many occurrences to keep or for how long to keep them. For example, you can keep the history and report outputs for the ten latest occurrences or for schedules that ran in the last two months. Use the report history to see the times at which the reports ran and whether the reports ran successfully.

Instructions

1. From **My Folders**, locate the report view you would like to schedule.



2. Click the **Schedule** button  for the entry you want to schedule.

3. Under **Frequency**, select how often you want the schedule to run.
The **Frequency** section is dynamic and changes with your selection. Wait until the page is updated before selecting the frequency.
4. Under **Start**, select the date and time when you want the schedule to start.
5. Under **End**, select when you want the schedule to end.

Team Tip:

If you want to create the schedule but not apply it right away, select the Disable the schedule check box. To later enable the schedule, clear the check box.

Team Tip:

Reminder schedule to run reports between the hours of 6:00 a.m. to 7:00 a.m.

6. If additional options are available on the **Schedule** page, specify what you want. For example, for reports, you can select formats, delivery method (including how to save report output files), and prompt values.

Schedule - Copy of BU-POS-149-Bgt & Job LD Fill/Vacant (My Dept) Help

Schedule this entry to run at a recurring date and time. You can run using the default values or specify the options. You can disable the schedule without losing any of its details.

☐ Disable the schedule Priority: 3 Start: May 21, 2012 10 : 17 AM

Frequency:
Select the frequency by clicking on a link.

[By Day](#) [By Week](#) [By Month](#) [By Year](#) [By Trigger](#)

Every 1 week(s) on:
☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday
☐ Friday ☐ Saturday ☐ Sunday

Daily Frequency:
☐ Every 1 Minute(s) between 9 : 00 AM and 5 : 00 PM

End:
☒ No end date
☐ End by: May 21, 2012 10 : 17 AM

Credentials:
srel (srel)

Options

☒ Override the default values

Formats:
☒ HTML
 Number of rows per Web page: 20
☒ Enable selection-based interactivity

☐ PDF
 No options saved
[Set...](#)

☐ Excel 2007
☐ Excel 2002
☐ Delimited text (CSV)
☐ XML

Accessibility:
☐ Enable accessibility support

Languages:
 English [Select the languages...](#)

Delivery:
 Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.
☒ Save the report
☐ Print the report
 Printer location: [Select a printer...](#)
☐ Send a link to the report by email [Edit the options...](#)
 srel (srel)

7. Click **OK**.
 A schedule is created and the report runs at the next scheduled time.

Note: You will be prompted for values only if the report specification or model includes prompts, even if the Prompt for values check box was selected.

Schedule Multiple Reports at Once

You can set the same schedule for multiple entries by creating a job. A job identifies a collection of reports, report views, and other jobs that are scheduled together and share the same schedule settings. When a scheduled job runs, all the entries in the job run.

Jobs contain steps, which are references to individual reports, jobs, and report views. You can specify whether to run the steps all at once or in sequence.


- When steps are run all at once, all the steps are submitted at the same time. The job is successful when all the steps run successfully. If a step fails, the other steps in the job are unaffected and still run, but the job has a **Failed** status.
- When the steps are run in sequence, you can specify the order in which the steps run. A step is submitted only after the preceding step runs successfully. You can choose to have the job stop or have the other steps continue if a step fails.

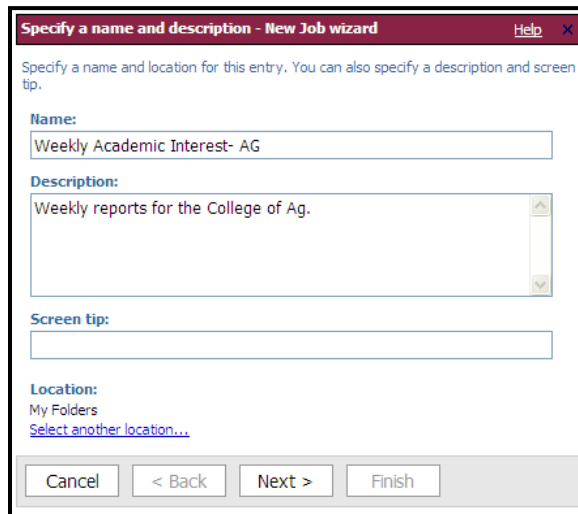
You can schedule a job to run at a specific time, or on a recurring basis.

The individual reports, jobs, and report views in steps can also have individual schedules. Run options for individual step entries override run options set for the job. You can set run options for the job that serve as the default for step entries that do not have their own run options.

You can run reports to produce outputs based on the options that you define, such as format and language.

Instructions

1. In **My Folders**, click the **New Job** button .



2. Type a name and, if you want, a description and screen tip for the job, select the location in which to save the job, and then click Next.
The Select the steps page appears.

Select the steps - New Job wizard [Help](#) ✕

Select the entries to include as steps of this job and the options to use when this entry runs.

Steps:

Steps:	...> Name	Options and prompt values
No entries.		

[Add...](#) [Remove](#) [Modify the sequence...](#) [Reset to default value](#)

Submission of steps:
Submitting steps in sequence implies that a step is submitted only upon completion of the step before it.

☒ All at once
☐ In sequence
☐ Continue on error

Defaults for all steps:
Select this option to specify default values for all steps of this job.
Default
[Set...](#)

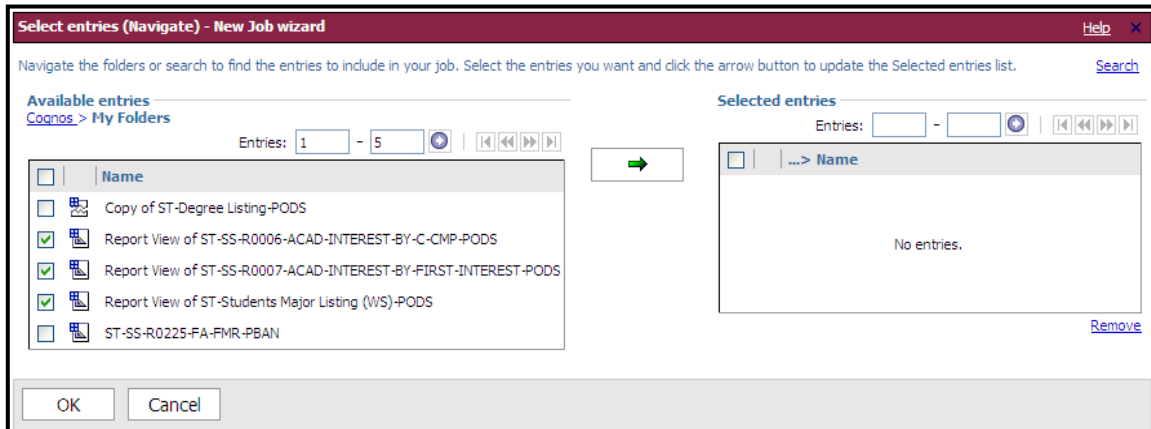
Run history details level:
Select the level of details to save in the run history when the run activity completes successfully. For failed runs, the details are saved.

All ▾

[Cancel](#) [< Back](#) [Next >](#) [Finish](#)

3. Click Add.

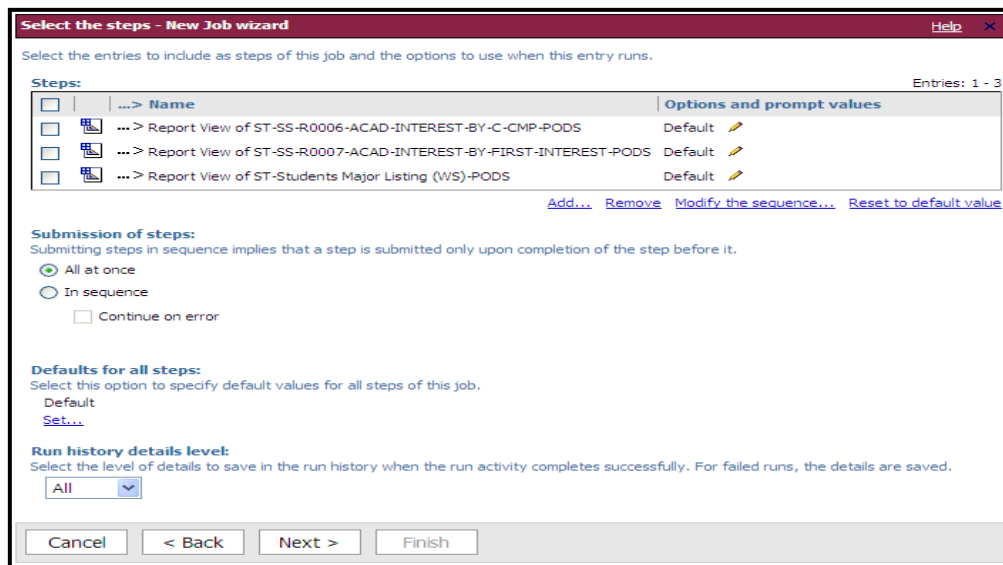
4. Select the check boxes for the entries you want to add.



5. Click the right arrow button.
6. When the entries you want appear in the **Selected Entries** box, click **OK**.

Team Tip: To remove entries from the Selected entries list, select them and click Remove. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click Show users in the list.

7. Click **Next**

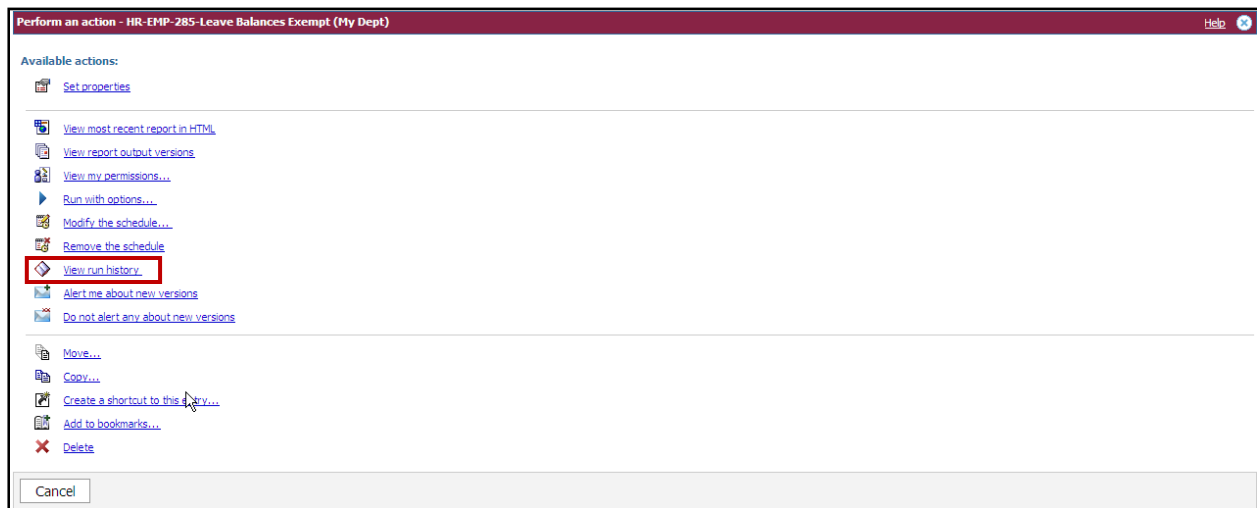


8. Select whether you want to **run**, **schedule** or **save only**.
9. Select **Finish**.

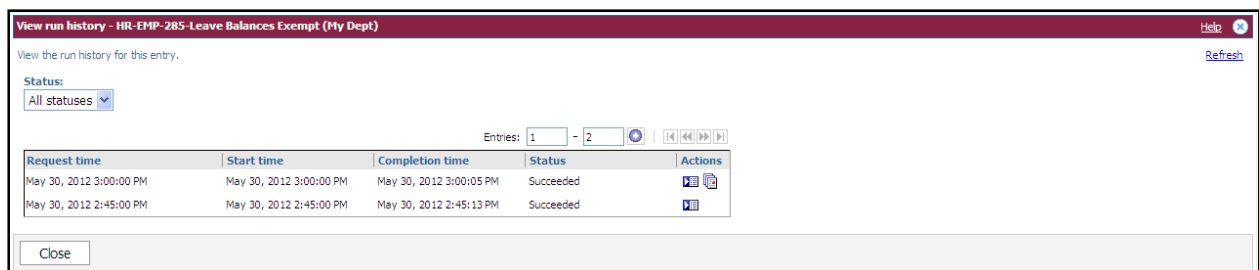
Check History Report

It may be necessary to verify that your scheduled reports are running successfully. The follow steps will confirm this process with your report.


1. In **My Folders** and from the **Actions** column, click the [More...](#) link for options available.
2. The Perform action screen will appear.

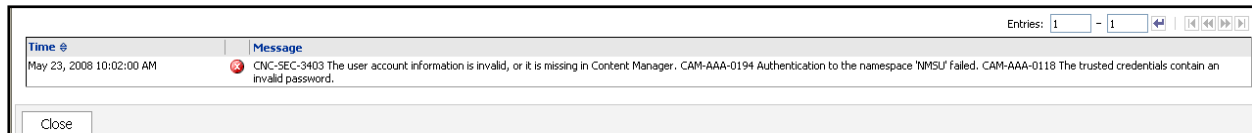


3. Click [View run history](#)
4. View history actions screen will appear.



5. Status will reflect **Successful** if schedule is applied.
6. If you receive a status of **Failed**, review **Actions**.

7. To view results click on  icon.
8. Results will be displayed you will receive message indicating why scheduled report failed.



Note: This message indicates that you may have had a change in your password. If the passwords has changed then you must re-establish your credentials. Refer to Appendix B to Refresh Credentials.

Introducing Query Studio

Query Studio is the ad hoc reporting tool for Cognos, the Web-based reporting solution. After a report is made available, it is published to the portal. You can then run the report or view report output versions. You can also view the report in various formats, schedule the report, and/or distribute the report. Using Query Studio, an ad hoc report can be defined by layout, style, and prompts. In **Query Studio**, you can perform the following tasks:

- **View data** – Connect to a data source to view data in a tree hierarchy. Expand the query subjects to view query item details.
- **Create reports** – Use the data source to create reports, which can be saved and reused. You can also use an existing report to create a new report.
- **Change the appearance of reports** – Improve the layout of a report by creating a chart, adding a title; specifying text and border styles; or reordering columns for easy comparison.
- **Work with data in a report** – Use filters, summaries, and calculations to compare and analyze data.


To use **Query Studio** effectively, you should be familiar with the Web, as well as New Mexico State University's (NMSU) policies, procedures and data.

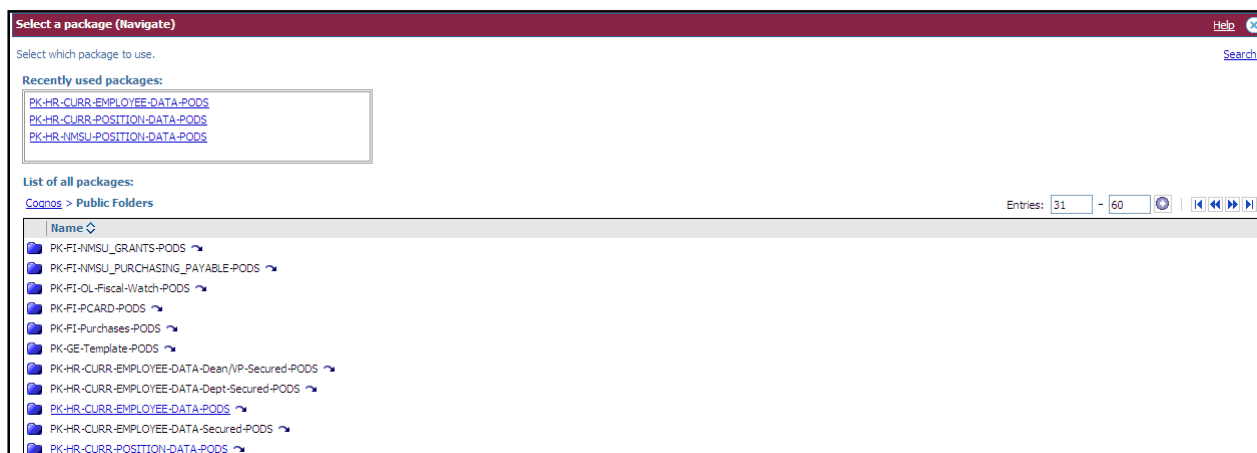
Creating a Report

Reports are created in Query Studio which allows you to explore data. You can create reports to analyze data and answer specific questions related to business functions.

An existing report may contain most of the information you require, with the exception of needing new prompt values or changes to the layout and/or style. Instead of creating a new report, you can create a report view, or save the report under a new name to make those modifications.

The following steps you through the process of creating a report.

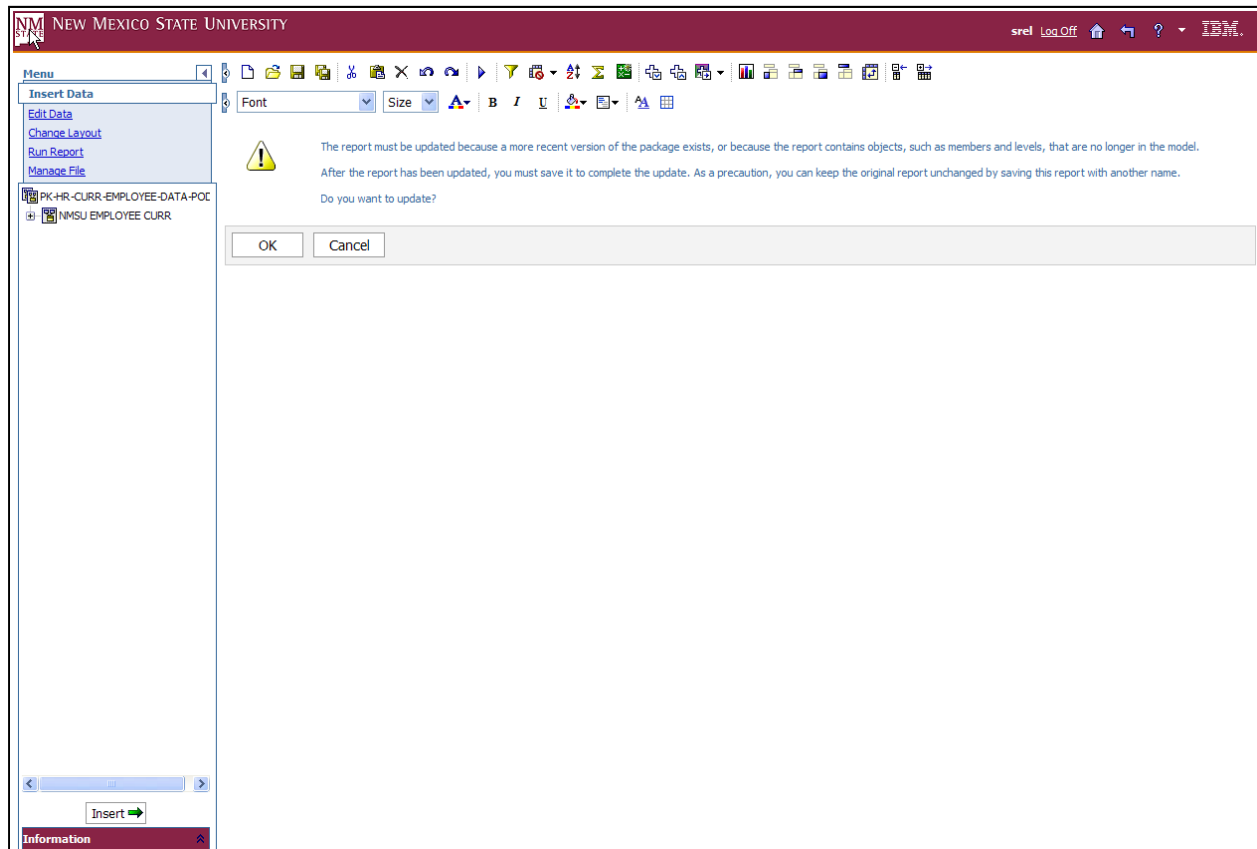
1. Locate the **Launch** link in the upper right hand corner .
2. Click on the down arrow and a drop down list will be displayed then select **Query Studio**. The **Select a Package** dialog box is displayed.



Note: Be advised that you may not have access to all packages listed. If access is denied a message is displayed.

3. Click the package containing the data you want to use in your report.
4. Query Studio displays.

Query Studio is now open and available to customize your reporting needs. Query items now need to be added to the report to provide content.



Add Data to a Report






A new report contains no data. You choose the data elements that you want to include in the report from the **Package**. **Packages** include:

- **Views**
- **Query items** such as columns of measures and non-measures
- **Query items** created by the data modeler, such as calculated report items

You can expand the scope of an existing report by inserting additional report items, or you can focus on specific data by removing unnecessary report items.

Data Source Icons

Each object in the data source has a representative icon.

Icon	Object
	Package
	View , which represents tables in the ODS (operational data store)
	Query Items , which represents a column of data, such as ID, NAME, CAMPUS
	Measure or fact , a Query Item that represents a column of data, such as YEARS OF SERVICE.
	Dimension , which represents a broad grouping of description data, ORIGINAL HIRE DATE, DEGREE DATE.

Instructions

1. Open a report in **Query Studio**.
2. Click the **Insert Data** menu command.
3. Select the View to expand the package hierarchy and view the available Data Elements.
4. Add the Data Element to the report in one of the following ways:
 - a. Double-click the Data Element.
 - b. Select a Data Element and click the Insert button.
 - c. Select a Data Element and drag it into the report preview area, highlighted in blue.

NEW MEXICO STATE UNIVERSITY

srel Log Off

Menu

Insert Data

Edit Data

Change Layout

Run Report

Manage File

Font

Size

B I U


HOME_ORGANIZATION_DESC: Center for Learning & Prof. Dev.

NAME: Ascending order

SUMMARY_ORG_DESC	HOME_ORGANIZATION_DESC	NAME	ID	EMPLOYEE_TYPE	EMPL_GROUP	EXEMPT_NONEXEMPT_IND	FT_PT_STATUS_DESC	POSIT
Senior VP for Admin and Finance	Center for Learning & Prof. Dev.	Name	ID	Regular	Staff	Exempt	Full-Time	19828
		Name	ID	Regular	Staff	Exempt	Full-Time	71823
		Name	ID	Regular	Staff	Exempt	Full-Time	71922
		Name	ID	Regular	Staff	Exempt	Full-Time	71796
		Name	ID	Regular	Staff	Exempt	Full-Time	19868
		Name	ID	Regular	Staff	Non-Exempt	Full-Time	19843
		Name	ID	Regular	Staff	Exempt	Full-Time	71792
		Name	ID	Regular	Staff	Exempt	Full-Time	19797
		Name	ID	Regular	Staff	Exempt	Full-Time	19836
		Name	ID	Regular	Staff	Exempt	Full-Time	19923
		Name	ID	Regular	Staff	Exempt	Full-Time	71970

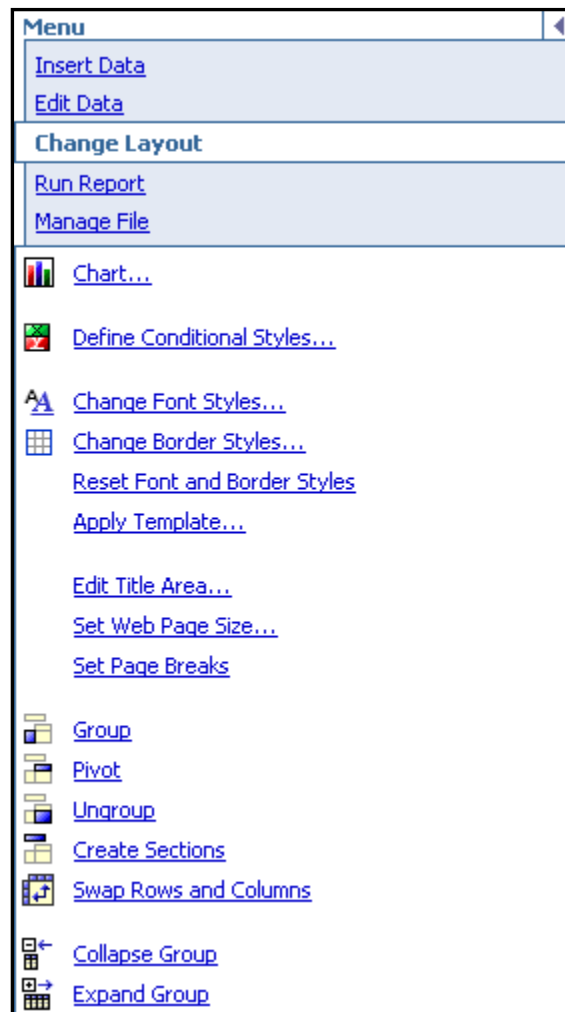
Information

By default, each new report item follows the last report item. You can also insert an item in a different position. By clicking an existing heading in your report, the next item you add from the package will precede this heading. To remove data permanently


from your report, click the report item heading, and then click the delete icon  on the toolbar.

Format Text and Data

You can format text and data in a report to give it the look you want. For example, you can change the column headings, the font and font color, as well as specify effects, such as strikethrough. Several formatting options are available from the **Change Layout** menu.



Instructions

1. If you want to format text for a particular object, such as a specific column or a column heading, click the object.
2. From the **Change Layout** menu, click **Change Font Styles** .
3. Specify the options you want to apply.
4. Click **Advanced Options** and click the objects that you want to format.

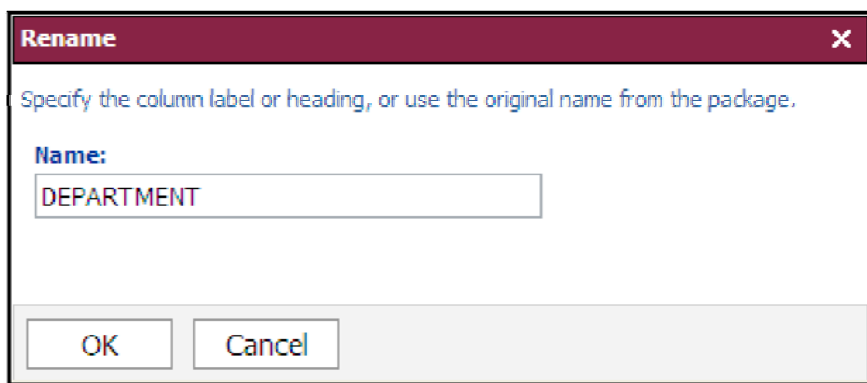
5. You can apply styles to the current selection or to specific objects, such as titles and the filter text.

Note: To reset values, click Reset to default values.

6. Click **OK**.

Change the Column Heading

1. Double-click the column heading.



2. Type the **Name** of the **Column Heading**.
3. Click **OK**.

Title a Report

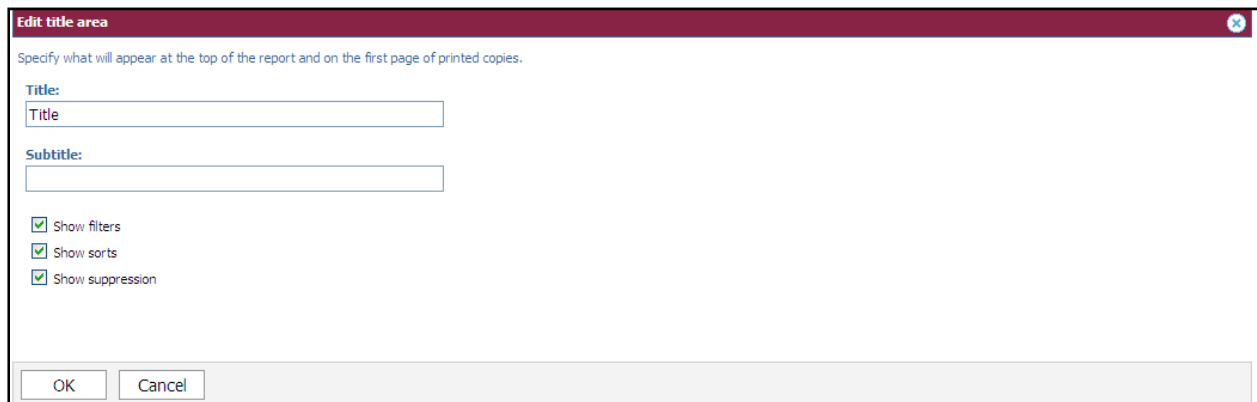
You can create your own descriptive report titles and subtitles.

By default, the link “Title” appears in a new report. Replace this with a more meaningful title, or remove it.

The title appears only in the report. Changing the report title does not change the report name that appears in Cognos Connection. Title your report to identify the report.

The following steps you through the process of titling a report.

1. Open the report in **Query Studio**.
2. Access the Edit Title Area box by either:
 - a. Clicking on the Report Title or
 - b. From the Change Layout menu, click Edit Title Area.



3. Type the **Title** of the report.
4. Type a **Subtitle** for the report. (optional)
5. Select **OK**.

Note: To remove a title, delete all text in the Title box.

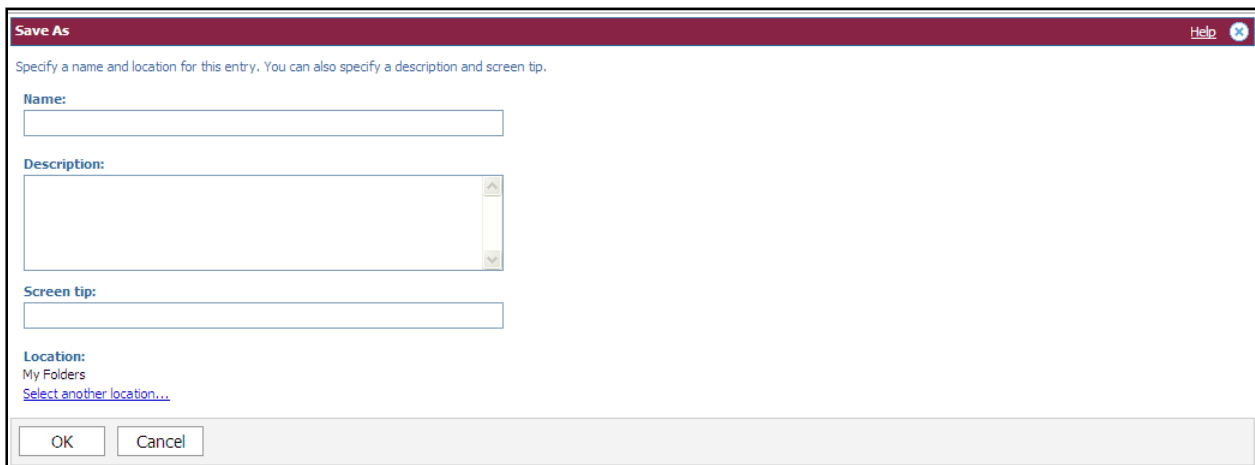
Save a Report

Save your report to preserve any changes.

What you save in **Query Studio** is the query definition, which is a specific set of instructions for extracting particular data. It is not a snapshot of the data you retrieve at the time you save the report. For example, if you run a report that you saved two weeks ago, the data in the report reflects any changes in the updated data source.

The following steps you through the process of saving a report.

1. Click the **Save** button  on the toolbar.



2. Type the name of the report in the **Name** field.
3. Type a description of the report in the **Description** field.
4. Type any tip information you want to add in the **Screen Tip** field. (optional)


Note: The screen tip appears when you pause your pointer over the icon for the entry in the portal. Up to 100 characters can be used for a screen tip.

5. Select the **Location** to save the report as **My Folders**, or any other folder located in the **My Folders** directory.
6. Click **OK**.

Save a Report Using a Different Name or Location

You can save a report using a different name or location. The report can be used as the underlying structure of a new report.

The following steps you through the process of saving a report using a different name or location.

1. Click the **Save As** button  on the toolbar.
2. Type the **Name** of the report.
3. Type the **Description** information.
4. Select the **Location** to save the report as **My Folders**, or any other folder located in the **My Folders** directory.
5. Click **OK**.

Edit a Report

You can use **Query Studio** authoring tools to change the report layout, style, or font. The report may also need to be updated because of changes to the data or to add language support.

Report Properties can be specified by changing the run options in the portal, which include: the preferred output format, language, prompt values, or report retention.

Editing a report modifies the report specification so that everyone who views the report sees the changes you made.

If you want to use a generic report as the underlying structure for additional reports, make a copy of the report.

If you want a report to appear in more than one location, create a shortcut.

If you want to keep the underlying report specifications and change the report format, language, delivery method, or run option, create a report view.

To edit a report you will first need to open the report in Query Studio. You can add or delete **Query Items** and save the report. You can use **Save As** if you wish to change the name of the report.

Working with Data

When you create a report using **Query Studio**, you can control what data your report uses, as well as how it is formatted, calculated, and sorted.

In **Query Studio**, you can perform the following tasks:

- Retrieve only the data you need by filtering the data.
- Organize the results by sorting and grouping the data.
- Format the data to determine how number, currency, date, and time values appear.
- Perform calculations using the data in your reports.

Change the Data Format

You can use predefined formats to change the appearance of numbers, dates, and times without changing the underlying data. For example, you can show a date in abbreviated format or in long format, which spells out the day and month.

Format	Description
Default	The default format is the format of the report item before any formatting is applied in Query Studio. Use default to remove formatting.
Number	Use the number format to change the number of decimal places, to specify whether to use a thousand separators, to choose different symbols to represent negative numbers, and to scale large numbers.
Currency	You can use currency symbol. You can also change the number of decimal places, specify whether to use a thousand separators, choose different symbols to represent negative numbers, and to scale large numbers.
Percentage	This format shows a number multiplied by 100, using two decimal places and a percent sign. For example, 0.7356 appears as 73.56%.
Scientific	This format shows a number in exponential notation. For example, the number 224,110 is 2.24110E+05 in scientific notation.
Date and Time	You can choose from a list of date and time formats, including the 12 or 24 hour clock.

Instructions

1. Open the report that you want in Query Studio.
2. Click the heading of the report item you want to format.
3. From the **Edit Data** menu, click **Format Data** and then click one of the following:
 - a. To format numeric data, in the **Category** box, click a type and define the format as required.
 - b. To format text data, in the **Category** box, click **Text** and type a number in the Number of visible characters box.
 - c. To format date and time data, in the **Category** box, click a type and then in the Type box, click a format.
4. Click **OK**.

Sort Data


Sorting organizes your data in either ascending or descending order. For example, you may choose to sort a departmental list in ascending order, thus arranging names alphabetically.

There are three ways to apply a sort to your data. You must first select the report item heading that you want to sort. The following are the three ways to apply a sort:

- Select the **Sort** button from the toolbar.
- Select the **Sort** button from the **Edit Data** menu.
- Right click the report item heading and select **Sort**.

Once you have selected to sort a report item you have a choice to sort the data in ascending order (A to Z) or descending order (Z to A).

The following steps you through the process of sorting data.

1. Click the heading of the report item you want to sort.
2. Click **Sort** 

Note: A small up or down arrow in the columns heading indicates sorted data.

Filters


You can use a filter to specify the subset of records that the report retrieves. Data that does not meet the defined criteria is eliminated from the report. You can filter textual, numeric, or date and time data.

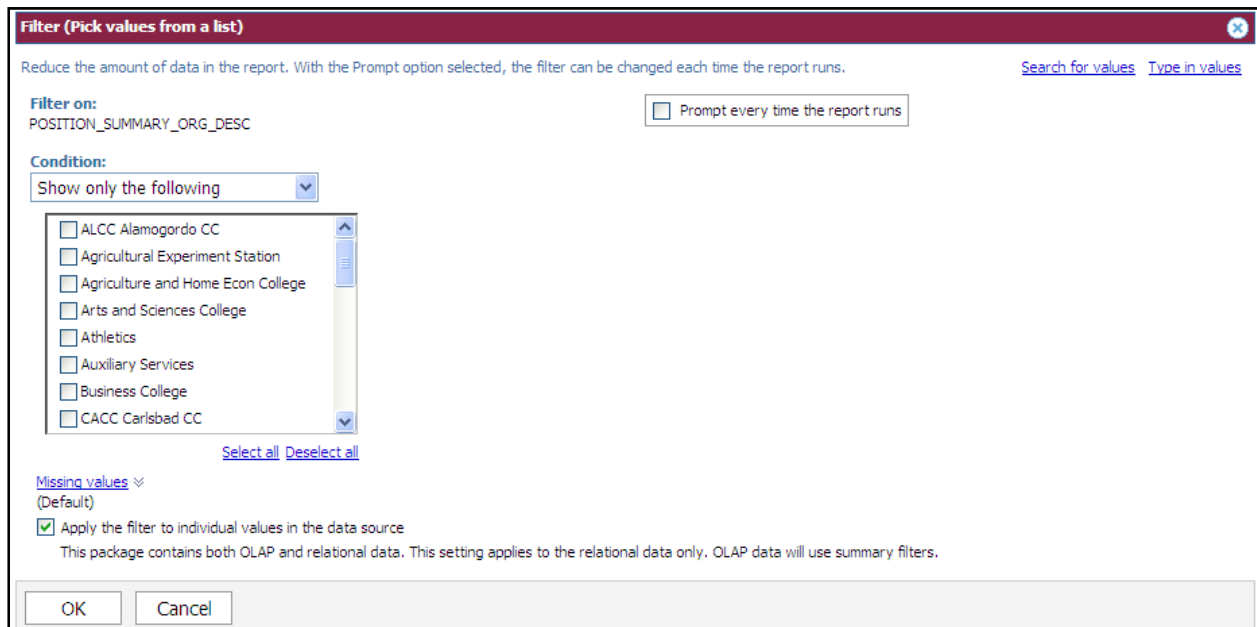
You can create a filter that retrieves specific data, such as the last name for a specific employee. When multiple columns are selected to be filtered, the columns are filtered from left to right in the report.

There are three ways to apply a filter. You must first select the report item heading that you want to filter. The following are the three ways to apply a filter:

- Select the **Filter** button from the toolbar.
- Select the **Filter** button from the **Edit Data** menu.
- Right click the report item heading and select **Filter**.

The following steps you through the process of filtering data.

1. Open a report in **Query Studio**.
2. Click the heading of the report item you want to filter.
3. Click **Filter** .



Filter (Pick values from a list)

Reduce the amount of data in the report. With the Prompt option selected, the filter can be changed each time the report runs. [Search for values](#) [Type in values](#)

Filter on:
POSITION_SUMMARY_ORG_DESC ☐ Prompt every time the report runs

Condition:
Show only the following

- ☐ ALCC Alamogordo CC
- ☐ Agricultural Experiment Station
- ☐ Agriculture and Home Econ College
- ☐ Arts and Sciences College
- ☐ Athletics
- ☐ Auxiliary Services
- ☐ Business College
- ☐ CACC Carlsbad CC

[Select all](#) [Deselect all](#)

[Missing values](#) (Default)

☒ Apply the filter to individual values in the data source

This package contains both OLAP and relational data. This setting applies to the relational data only. OLAP data will use summary filters.

OK Cancel

4. Choose the values wanted to filter the record.
5. Select **OK**.


The report will list the records that have the relevant value information selected from the filter.

Note: The filter icon , in the upper left corner indicates the report has been filtered, and lists the Data Element criteria used for filtering.

Use a Prompt

Prompts are used when you want to use different criteria for the same report item each time the report runs. The report does not run until you choose the values. Using prompts is faster and easier than repeatedly changing the filter.


The following steps you through the process of adding prompts to a report.


1. Click the heading of the report item you want to filter.
2. Click the **Filter** button  on the toolbar.
3. Select the **Prompt every time the report runs** check box.
By selecting this check box you are asked to choose the filter values each time the report is run.
4. Select **OK**.

Grouping

If a column in a report contains multiple instances of the same value, you can group these identical values together.

Instructions


1. Open the report that you want in Query Studio.
2. Click the heading of the report item you want to group by.
3. Click the **group** button  on the toolbar.
The report suppresses duplicate values of the selected report item and lists the values in each group.

Note: To ungroup or to remove sections, click the original item heading or section heading and then click the ungroup button  on the toolbar.

Creating Sections

Creating sections shows the value of a selected report item as the heading of a section.


Instructions

1. Open the report that you want in **Query Studio**.
2. Click the heading of the report item you want to group by.
3. To create sections, click the **create sections** button  on the toolbar.

Create a Crosstab Report – Pivot

Use a crosstab report to show summary information. Like list reports, crosstab reports show data in rows and columns. However, the values at the intersection points of rows and columns show summarized information rather than detailed information.

Instructions

1. Open the report that you want in **Query Studio**.
2. Click the heading of the report item you want to use as the top row.
3. Click the pivot button  on the tool bar.
The values of the selected report item are now column headings. The other report items become row headings, and the measure is now at the intersection of the two.

Note: To change the crosstab report back to a list report, click the top row, and then click the ungroup button on the toolbar.


Swap Rows and Columns

You can interchange rows and columns in a crosstab, a chart based on a crosstab, or both. For example, if you have a crosstab report that has few rows and many columns, you can swap the rows and columns to make the report easier to read.

If you have multiple rows or columns in a crosstab report, the outermost rows become the outermost columns, and the outermost columns become the outermost rows.

Note: You cannot swap rows and columns in a list report.

Instructions

1. Open the report that you want in **Query Studio**.
2. Click the **swap rows and columns** button  on the toolbar.
3. If you have both a chart and a crosstab report open, you can specify which to swap.

Set Page Breaks

You can set page breaks in a report to control the data that appears on each page. For example, you have a list that shows all products sold by your company, grouped by product line. You insert a page break so the details for each product line appear on a separate page.

You must have a grouped column or you must create sections before you can set page breaks.

Instructions

1. Open the report that you want in Query Studio.
2. Click the report item that you want to use to insert page breaks.
3. From the **Change Layout** menu, click **Set Page Breaks**.

Note: After you have set page breaks, view the report in PDF, Excel 2002 or Excel 2007 format to see the page breaks. If you view the report in HTML, it appears in a single HTML page with space separating each group or section.

Calculations

You can perform many types of calculations in Query Studio. For example, you can calculate the sum or average of the values in one column, or multiply the values in two columns.

Calculation results are not stored in the underlying data source. Instead, Query Studio reruns the calculation each time you run the report. The results are always based on the most current data in the data source.

Note: The functions available when creating calculations are restricted by functions available in the data source.

You can perform calculations in Query Studio by adding summaries or by adding calculations.

Summaries	Use the Summarize command to add or remove footer values, or to change how detail values are calculated. For example, use the Summarize command to place an average in each footer.
Calculations	Use the Calculate command to create new report items using data from one or more report items. For example, use the Calculate command to add together several columns in a list report.

Add a Summary to a Report

You can use predefined summaries to calculate the total, count, maximum, minimum, or average of the values in individual report items.

You can apply a summary to:

Detail values – These values appear in the detail rows of your report. This functionality is available only if the data in a report item is a measure.

Summary values – These values appear in footers.

The summaries available depend on the type of data in the selected report item. There is no visible indication that a summary is applied.

Query Studio provides the following predefined summary functions.

Function	Description
Total	Returns the sum of a set of values.
Count	Returns the total number of records.
Maximum	Returns the maximum value. When applied to date or time data, this returns the latest value.
Minimum	Returns the minimum value. When applied to date or time data, this returns the earliest value.
Average	Returns the average of a set of values.
Calculated	Specifies that the summary is defined within the expression that is used to populate the column.
Automatic	Summarizes values based on the data type.
Median	Returns the median value of the selected data item.
Standard Deviation	Returns the standard deviation of the selected data item.
Count distinct	Returns the total number of unique non-null records.
Variance	Returns the variance of the selected data item.
None	Removes footers. This applies only to footer values, not details.

Add a Calculation to a Report

You can perform calculations in a report using data from one or more report items.


You cannot edit a calculation. Instead, you must delete the calculated report item and recalculate it.

The following functions are available when you create a calculation.

Arithmetic operations	Description
+ (sum)	Adds the values of the selected report items.
- (difference)	Subtracts the values of one selected report item from another.
* (multiplication)	Multiplies the values of the selected report items.
/ (division)	Divides the values of the selected report items.
^ (power)	Raises the values of the selected report item to an exponent.
Absolute value	Calculates the absolute value of the numbers in the selected report item.
Round	Rounds the values in the selected report item to the nearest integer.
Round down	Rounds the values in the selected report item to the next lowest integer.
Square Root	Calculates the square root of the values in the selected report item.

Analytic operations	Description
Average	Calculates the average of values in the selected report items.
Maximum	Calculates the largest of the values in the selected report items.
Minimum	Calculates the smallest of the values in the selected report items.
Rank	Returns the rank of each value in the selected report item. For grouped reports, it can return the rank of each value in a group or within all values.
% of total	Calculates each value of a selected report item as a percentage of the total. For grouped reports, returns each value as the percentage of the group total or the overall total.
Percentile	Returns a percentile of values. For grouped reports, it can return the percentile for each value in a group or within all values.
Quartile	Returns the quartile of values. For grouped reports, it can return the quartile for each value in a group or within all values.
Quantile	Returns the quantile of values. For grouped reports, it can return the quantile for each value in a group or within all values.

Instructions

1. Open the report that you want in **Query Studio**.
2. Click the headings of the report items you want to include in the calculation.
3. Click the **calculate** button  on the toolbar.
4. In the **Operation** box, click the type of operation you want to perform.
5. Choose which data to use for the calculation:
 - a. To use the data in existing report items, in the **Selected report items** box, click the report items you want.
 - b. To use other data, in the **Number** box, specify a number.
6. Click **Insert**.
7. The calculated results appear in a new column. By default, the expression used in the calculation is used as the heading name.

Charts

Use charts to present information graphically.

A report requires at least one measure and one non-measure to produce a chart. Measures are quantitative data, such as figures for sales, costs, and quantities. Non-measures are qualitative data, such as names, addresses, and countries.

How the data is plotted depends on the chart type. The maximum number of non-measures is two. You can plot any number of measures in a report. However, a chart that has more than four or five measures is difficult to understand.


Query Studio charts plot the most summarized data in the report. Focus the chart by eliminating unnecessary measures from your report and reordering the columns so that the most significant non-measures are in the outer levels of nesting.

Create a Chart

Use charts to see patterns and trends in data. For example, you can see how actual sales compare to projected sales, or whether sales are falling or rising over quarterly periods.

You can show just the chart, or the chart with the table appearing under the chart.

Instructions

1. Open the report that you want in Query Studio.
2. Reorder report items, if necessary.
3. Click the **chart** button  on the toolbar.
4. In the **Chart type** box, click a **chart style**.
5. Click a **chart configuration**.
6. If you want to view only the chart, click **Chart only**.
7. If you want the values to appear on the chart, select the **Show the values on the chart** check box.
8. Click **OK**.

Note: To remove a chart, click the chart button on the toolbar, and then in the Chart dialog box, click None.

Appendix A: Preparing your Browser Settings

Users should utilize one of the approved browsers to use Cognos successfully. Although the user probably could log on to Cognos with any browser, there could be a point where certain features might not work.

It becomes very obvious that something is wrong when buttons don't work, or features won't load. The first step in troubleshooting any Cognos problems will be to verify that browser is supported.

Browsers fall into three categories:

Active: The browser has been tested extensively.

Compatible: The browser has been through limited testing, or support is based in Cognos partners and/or third party vendor's compatibility statements.

The following lists the web browsers supported by Cognos:

COGNOS CONNECTION / REPORT VIEWER / QUERY STUDIO / REPORT STUDIO / ANALYSIS STUDIO	OPERATING SYSTEM	COGNOS 8 SERVER
Microsoft Internet Explorer 8.0	Windows	Active
Microsoft Internet Explorer 7.0	Windows	Active
Microsoft Internet Explorer 6 SP2	Windows XP	Compatible
Firefox 3.6	Windows / OS X/UNIX/Linux	Compatible
Firefox 3.5	Windows / OS X/UNIX/Linux	Active

Note: MS Office integration is only supported on Windows platforms (i.e. export to Excel).

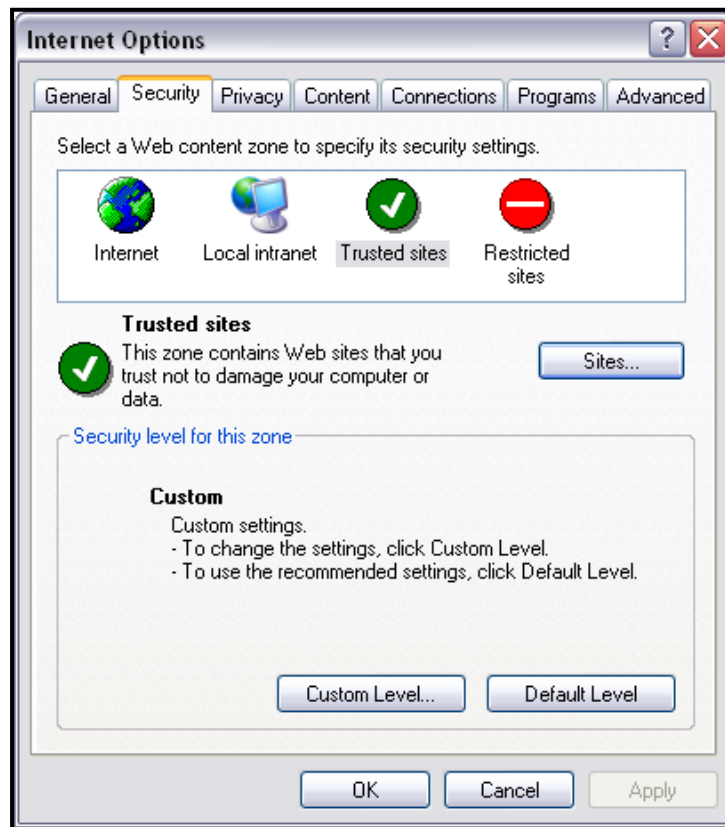
If you have any questions or problems with your browser, please contact cognos_help@nmsu.edu or 646-1840.

There are a few settings that need to be changed in Internet Explorer to ensure that your reports open correctly.

Note: Make sure that all your pop-up blockers are turned off; this includes the Google toolbar pop-up blocker.

Local Intranet

1. Open your Internet browser.
2. Select **Internet Options** from the **tools** menu.
3. Click on the **Security** tab.

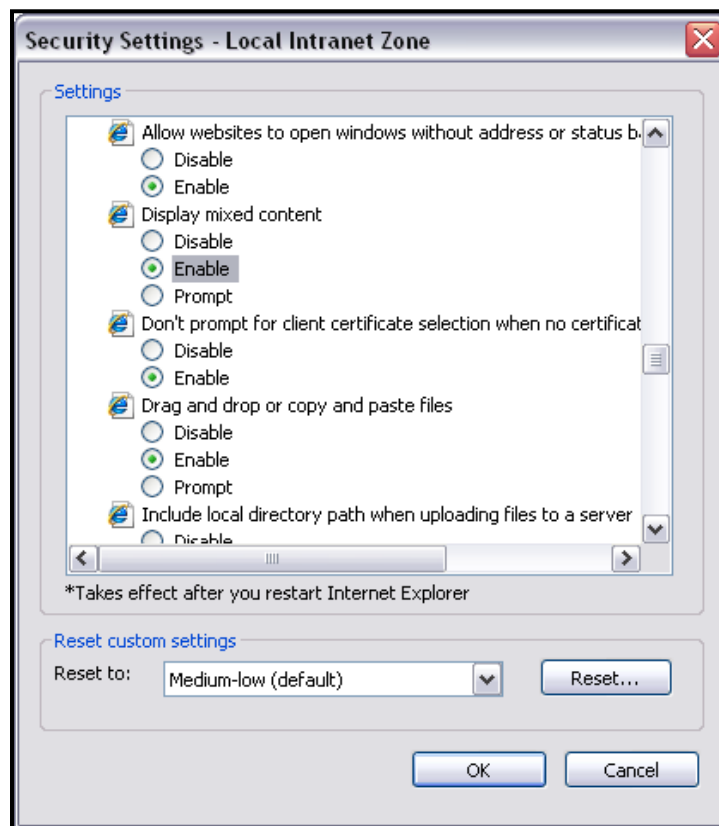


4. Select the **Local Intranet** icon.
5. Click the **Sites** button.
6. Click the **Advanced** button.
7. Type http://*.nmsu.edu.
8. Click the **Add** button.
9. Type https://*.nmsu.edu.
10. Click the **Add** button.
11. Click the **Ok** button.

Custom Security Level

To have this list of trusted domains accept mixed (both secure and non-secure) content complete the following steps.

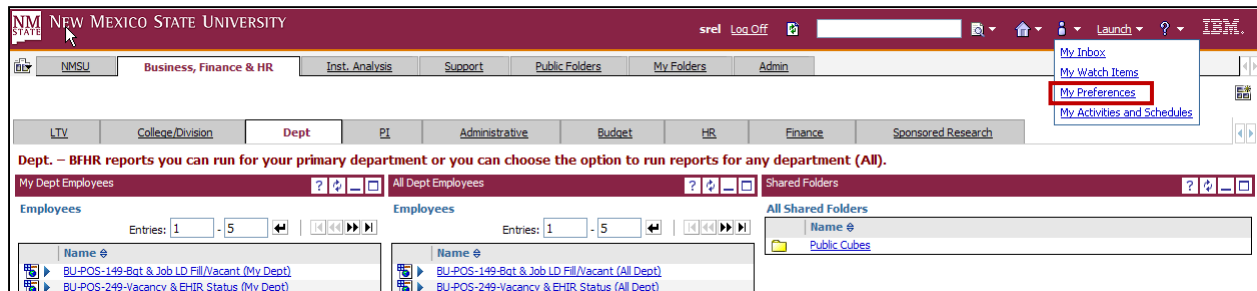
1. Click the **Security** tab.
2. Click **Custom Level**.
3. From the **Miscellaneous** section under **display mixed content** heading, click the **Enable** radio button.
4. Click **Ok**.



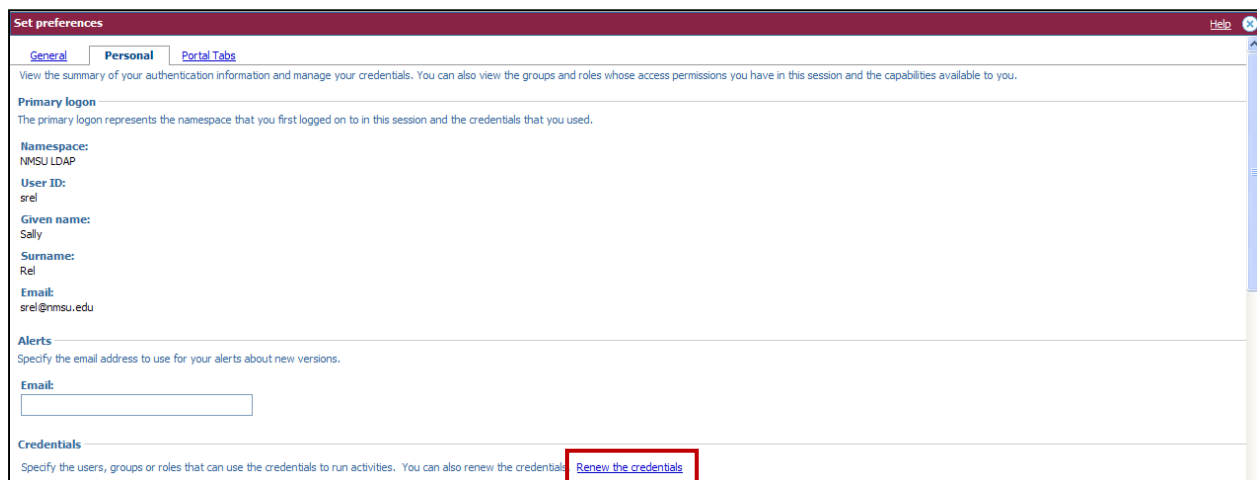
Appendix B: Refreshing Your Credentials

Refreshing your credentials sends confirmation back to the server that you are authorized to be using several of the Cognos functions such as scheduling. If for some reason your schedule fails and you do not receive your scheduled report as expected, you will need to refresh your credentials.

1. From the **Tools** Menu, click **My Preferences**.



2. Select the **Personal** tab.

























3. Click **Renew the Credentials**.



4. Click **OK**.

Appendix C: Cognos Connection Icons

ICON	DESCRIPTION	ICON	DESCRIPTION
	Show entries in a list		Open with Report Studio
	Show detail information for each entry		New schedule
	Create a new folder		Move entry
	Scheduled job / Run multiple reports		Copy entry
	Create a URL to an external file or Web site		Create a shortcut
	Refresh the portal		Create a report view
	My Area		Create a bookmark
	Set the order for folders and entries		Copy the selected entries
	Show the properties for the current folder or package		Cut the selected entries
	Set properties		Paste the clipboard contents to the current location
	Run with options		Delete the selected entry

Appendix D: Glossary

access permissions	Rules defining the access rights to resources. Access permissions can be granted to any combination of namespaces, groups, or users. Examples of resources are reports and folders.
agent	The object type created and edited by Event Studio. An agent contains the event condition and the associated tasks to perform. Once defined, an agent can be scheduled to check for instances of the event.
analysis	A process where a user interacts with data to gain insight and understanding. In IBM Cognos, Analysis Studio is designed to facilitate analysis.
anonymous access	A method of accessing resources in which users are not authenticated, and all users gain the same access permissions.
authentication	The process of verifying the identity of users when they log on. Users must be authenticated before they can be authorized to use any secured resources.
authentication provider	The communication mechanism to an external authentication source. Functionality such as user authentication, group membership, and namespace searches are made available through authentication providers.
burst	To create many report results by running a single report once. For example, you can create a report that shows sales for each employee, and run it once, sending different results to regional managers by bursting on region. You set up bursting in Report Studio and enable it in the portal.
burst key	The dimension or level of a query in the report specification that is used to create, or burst, a set of report results. For example, you can create a report that shows sales for each employee, and send different results to regional managers by bursting on region.
Cognos Connection	The portal interface of Cognos .
Columns	In reports, a report item shows data in a vertical list. In a model, query items represent columns.
connection	The named information that defines the type of the data source, its physical location, and any sign on requirements. A data source can have more than one connection.
contact	A named email address to which reports and agent emails can be sent. Contacts are never authenticated.
Content Language	The code or setting that specifies what language and regional preferences to use for the data that appears in a report.

content locale	A code that is used to set the language or dialect used for browsers, report text, and so on; and the regional preferences, such as formats for time, date, money, money expressions, and time of day. For IBM Cognos products, you can specify a locale for the product interface (product locale) and for the data in the report (content locale).
Content Manager	The IBM Cognos service that manages the storage of customer applications, including application-specific security, configuration data, models, metrics, reports, and report output. Content Manager is needed to publish models, retrieve or store report specifications, manage scheduling information, and manage the Cognos namespace.
content store	The database that contains data that IBM Cognos needs to operate, such as report specifications, published models, and the packages that contain them; connection information for data sources; information about the external namespace, and the Cognos namespace itself; and information about scheduling and bursting reports. Design models and log files are not stored in the content store. The IBM Cognos service that uses the content store is named Content Manager.
credentials	Information stored about the identity of an IBM Cognos user, usually a user name and password. You can assign your credentials to someone else so that they can use resources that you are authorized to use. Credentials are created for IBM Cognos components. If a user schedules or programs an action, credentials must be stored in the content store.
CSV	Comma Separated Values (CSV), a file format that contains text data, where the fields in each record are separated by a character, such as a comma or a tab. In Cognos , each record is separated by a tab.
Data Element	Describes a single aspect of each member of a data view. A student record, for instance, might contain a last name field, a first name field, a date of birth field and so on. All records have exactly the same structure, so they contain the same fields. The values in each field vary from record to record, of course. Also known as attributes or fields.
data source	A relational database, dimensional cube, file, or other physical data store that can be accessed through IBM Cognos.
Data View	A single store of related information. A data view contains a number of Data Elements .

deployment	<p>The process of moving an IBM Cognos application (reports, models, and so on) to a different instance of IBM Cognos. For example, you often create reports in a test environment and then deploy them to production.</p> <p>When you deploy an application, you export, transfer, and import it.</p>
deployment archive	<p>A file used for deployment. A deployment archive contains the data from the content store that is being moved.</p>
deployment specification	<p>A definition of what packages to move (deploy) between source and target environments, the deployment preferences, and the archive name. You use deployment specifications for import and for export.</p>
drill down	<p>In IBM Cognos Planning, drill down is a technique used to analyze D-Cube data that was imported by a D-Link. You can drill down on any single cell in a D-Cube. If the cell contains data transferred by a D-Link, drill down opens a view of the source data. If the data was imported from another D-Cube, drill down opens the appropriate selection from the source D-Cube. If the data was imported from an external source (a mapped ASCII file or an ODBC database), drill down extracts the relevant data from the source file and displays it in a special drill-down results dialog box.</p> <p>In IBM Cognos BI, drill down refers to the act of navigating from one level of data to a more detailed level. The levels are set by the structure of the data. See also drill up.</p>
drill up	<p>The act of navigating from one level of data to a less detailed level. The levels are set by the structure of the data.</p> <p>See also drill down.</p>
event	<p>An exceptional item of data, defined by specifying a query expression against items in a package. When data is detected matching the event condition, it causes an agent to perform tasks.</p>
Filters	<p>A program or routine that blocks access to data that meet a particular criterion.</p>
gateway	<p>An extension of a Web server program that transfers information from the Web server to another server. Gateways are often CGI programs, but may follow other standards such as ISAPI and Apache Modules.</p>
glyph	<p>An image of a character in a font.</p> <p>Letters are glyphs, but in most cases, the term is used in discussions of non-alphabetic writing systems.</p>

group	<p>In security, a list of users or other groups that can be used to assign access permissions and capabilities.</p> <p>Groups can be referenced from other authentication sources or can be local to IBM Cognos. Local groups are managed from the administration portal. The list of groups that an authentication user is a member of is part of the user's passport for an IBM Cognos session.</p> <p>In reporting, grouping is the action of organizing common values of query item together and only displaying the value once. Headers and footers often appear after each instance of a common value in a grouped column</p>
Heading	The area that appears at the top of a column or before a section that contains the name of the report item. You click the heading to select the report item.
HTML	HyperText Markup Language (HTML), a markup language used to structure text and multimedia documents and to set up hypertext links between documents, used extensively on the World Wide Web.
job	A group of runnable objects, such as reports, agents, and other jobs that you run and schedule as a batch.
job step	The smallest part of a job that can be run separately. Usually, a job step is a report. A job step can also be another job.
locale	<p>A code that is used to set the language or dialect used for browsers, report text, and so on; and the regional preferences, such as formats for time, date, money, and money expressions.</p> <p>For IBM Cognos products, you can specify a locale for the product interface (product locale) and for the data in the report (content locale).</p>
Measure	<p>A query item that contains values that can be aggregated to produce meaningful results. For example, product costs can be treated as a measure because average and total costs have some meaning.</p> <p>Product codes, though numbers, are not usually treated the same way. Measures are quantitative performance indicators and give the numbers that usually appear in the cells of cross tab reports or in the numbers of a chart. Measures are also known as facts.</p>
metric	A measure to assess performance in a key area of a business.
metric package	An IBM Cognos Connection representation of a Metric Studio application. A metric package contains connection information, reports, and metric management tasks for that application.

model	<p>A physical or business representation of the structure of the data from one or more data sources. A model describes data objects, structure, and grouping, as well as relationships and security. In IBM Cognos BI, a design model is created and maintained in Framework Manager. The design model or a subset of the design model must be published to the IBM Cognos server as a package for users to create and run reports.</p> <p>In IBM Cognos Planning, a model is a group of D-Cubes, D-Lists, D-Links, and other objects stored in a library. A model may reside in one or more libraries, with a maximum of two for Contributor.</p>
namespace	<p>For authentication and access control, a configured instance of an authentication provider. Allows access to user and group information.</p> <p>In XML, a collection of names, identified by a URI reference, which are used in XML documents as element types and attribute names. In Framework Manager, namespaces uniquely identify query items, query subjects, and so on. You import different databases into separate namespaces to avoid duplicate names.</p>
news item	<p>A single entry in a rich site summary (RSS) compatible format. It can include a headline, text, and a link to more information. A news item task in an agent can be used to create news items for display in an IBM Cognos Connection portlet.</p>
package	<p>A subset of a model, which can be the whole model, to be made available to the IBM Cognos server.</p> <p>For Metric Studio users, see metric package.</p>
passport	<p>Session-based information regarding authenticated users. A passport is created the first time a user accesses IBM Cognos. It is retained until a session ends, either when the user logs off, or after a specified period of inactivity.</p> <p>Passport information is stored in Content Manager memory. Credentials are stored encrypted.</p> <p>A passport is stored in a memory-only browser cookie for the duration of the session.</p>
PDF	<p>Portable Document Format (PDF), A file format that maintains the formatting of the original document without the program and fonts that were used to create it. In Cognos, you, can view, print, and distribute reports using this format.</p>
Portal	<p>A Web site or page that provides a single presentation and a single starting point for a set of information. Cognos Web products may use a Cognos portal such as Cognos Connection, or may be integrated with other portals.</p>
portlet	<p>A mechanism for displaying Web content as part of a portal page.</p>

product locale	The code or setting that specifies what language, regional settings, or both to use for parts of the product interface, such as menu commands.
project	In Framework Manager, a set of models, packages, and related information for administration, and for sharing model information. In Metric Studio, a project is a task or set of tasks undertaken by a team and monitored on a scorecard. A project tracks the dates, resources and status of the project. In Metric Designer, a project is a group of extracts. Each extract contains the metadata that is used to populate the Metric Studio data store or to create applications.
prompt	A report element that asks for parameter values before the report is run.
publish	In IBM Cognos BI, refers to exposing all or part of a Framework Manager model or Transformer PowerCube, via a package, to the IBM Cognos server, so that it can be used to create reports and other content. In IBM Cognos Planning, refers to a function that is used to copy the data from Contributor or Analyst to a data store, typically so it can be used for reporting purposes.
Qualitative Data	Non-measure data, such as products or names. Numbers can also be qualitative data, such as order numbers and serial numbers.
Query	A specification for a set of data retrieved from a data source. A report specification can contain one or more queries. In Query Studio, the type of object created and edited. A query is a subtype of report. In Transformer, models can contain multiple queries as data sources. A query or data source appears as a cylinder icon in the Data Sources list.
Query Item	A representation of a column of data in a data source. It contains a reference to a database column, a reference to another query item, or a calculation. Query items may appear in a model or in a report.
Query Subject	In a model, the equivalent of a table of columns in a database. Query items within the query subject represent the columns that make up the table.
Really Simple Syndication	(RSS) See rich site summary.
Report	Report (more precisely, report specification) is the generic term for the objects created or edited by Query Studio, Report Studio, and Analysis Studio.

Report Item	A query item added to a report is known as a report item. Report items appear as columns in list reports, and as rows and columns in crosstab reports. In charts, report items appear as data markers and axis labels.
Report Output	Report output combines data at the point in time when the report was run with a report specification. It is a document that can be displayed, printed, or emailed. IBM Cognos can produce report outputs in HTML, PDF, Excel, or CSV formats.
Report Specification	The definition of queries, prompts, layouts, and styles that make up a report. A report specification is combined with data by a run operation to create report outputs. You create report specifications by using Report Studio, Query Studio, Analysis Studio, or through the Software Development Kit.
Report View	A reference to another report that has its own properties, such as prompt values, schedules, and results. You use report views to share a report specification instead of making copies of it.
Rich Site Summary	(RSS) An industry standard format for displaying transient data, such as breaking news, in a web page or standalone viewer. IBM Cognos Connection includes a portlet type for displaying RSS format data. This can be used to display data from a public RSS service or to display news items generated by agents detecting events. A synonym for Really Simple Syndication.
Role	A special group users can choose when they log on to change what groups they can authenticate so they can change what data they have authorization for.
Session	The time during which an authenticated user is logged on to IBM Cognos.
Sort	Organizing data in a sequential order.
Summary	In reporting, summaries are aggregate values that are calculated for all the values of a particular level or dimension. Examples of summaries include total, minimum, maximum, average, and count.
Tables	Structures in a database that contain data organized into rows and columns. In a model, query subjects represent tables.
Task	An action performed by an agent if the event status meets the task execution rules. For example, an agent can send an email, publish a news item, or run a report.
Template	A reusable report layout or style that can be used to set the presentation of a query or report.
URL	The global address of documents and other resources on the World Wide Web.

User	A person accessing an IBM Cognos application. User information, such as the location of personal folders or preferred formats for viewing reports, is stored in IBM Cognos. Authenticated user definitions and information, such as passwords and IDs, are maintained in other authentication sources.
Watch List	A list of metrics that each user has chosen to monitor closely. If notification is enabled in Metric Studio, the user will receive email notification of changes to these metrics. Users can also choose to display their watch list as a portlet within IBM Cognos Connection.
Watch Rule	A user-defined condition that determines whether a report is delivered to the user. When the rule is run, the output is evaluated and, if it satisfies the condition or rule, the report is delivered by email or news item. Watch rules limit report delivery to those reports containing data of significance to the user.
Web Services for Remote Portlets	(WSRP) A standard for creating presentation-oriented Web services so that they can be easily integrated within other applications, such as Web portals.
XML	A language that uses markup symbols or tags to create descriptions of the structure of data. The XML standard is defined by the World Wide Web Consortium (W3C), and is related to HTML and SGML. Unlike HTML, XML is extensible because the tags aren't predefined or limited.