Introduction to Cognos

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What is Cognos?

Cognos is the reporting tool used at Texas Tech University to retrieve information that is stored in Banner. Data for Accounts Receivable, Budget, Finance, Human Resources, and Student can be accessed using Cognos. The data provided is through end of day, previous business day.

Report Access

Finance Reports
If a person is an employee of TTU with an active eRaider they are able to access and execute the finance reports created for departmental users. No action is required of the Financial Manager for access to finance reports.

Human Resource Reports
Human Resource reports require that access be granted to the user by the Level 5 or Level 7 Financial Manager for the organization, using the TEAM Application (TeamApp) to grant access. Access is granted at various levels of the Organizational Hierarchy.

Student Reports
To access TTU Cognos Student Reports, you must:

1. **Have a valid eRaider account.**

2. **Complete FERPA training.** The Family Educational Rights and Privacy Act (FERPA) training is a requirement for accessing student information at TTU. To take the course online, visit SumTotal Systems. If you encounter issues, please email HR Systems TTUS <hrs.systems@ttu.edu>.

Note: TTU Cognos Student Report permissions are granted by the Registrar's Office after the appropriate training is completed and attendance records are validated by a security coordinator.
Accessing the Cognos System

From Raiderlink:
Select the tab “A&F Work Tools”:

Select Reports from one of the channels: AFISM, Budget, Finance, Procurement

Or, you can access Cognos from AFISM Home page http://www.depts.ttu.edu/afism:
Select Tools & References in the top menu, and then select Cognos Prod within ERP Tools.

URL Logon, enter the URL for Cognos into the search field: https://cognos.texastech.edu
Sign in using eRaider Username (eRaider ID) and Password.

Cognos opens to the Analytics Portal as shown below.
Cognos Home Page

Accessing Reports
Reports are housed in the folders located in the left navigation menu: My Content, Team Content and Recently Viewed.

- **“My Content”** holds “report views” saved by the user
- **“Team Content”** houses various shared and private folders, standard reports and Cognos packages located within this tab.
- **“Recently Viewed”** houses reports that the user has executed
The folders in the left menu house reports for the users to access. The reports that have been created for departments to use are housed in the “Team Content” folder as shown below. Select the “Content Folder” to access the desired report Category.

Select the “Report Type” within selected “Category Folder”. Note the breadcrumbs at the top of each folder.

Select the “Report” from the “Report Type” folder. A report can be found in more than one folder if it can be used for more than one purpose.

Executing a Report

Once the desired report has been located, click on the Report name to access the report.
Report Parameter Pages

The parameter page provides the user the opportunity to provide the data to report on, actually limiting the data that the report provides. Parameters can be required (circled in red above) or optional (circled in green).

- A Required parameter is identified with has an asterisk, arrow and dotted line below it:

- The Option to “Finish” the report will not display until all required parameters have a value.
Types of Prompts

**Value Prompt** User selects value(s) from a list. The values may be static or they may display based upon choice made in a required parameter.

**Drop down Value Prompt**

Select the Home Organization Chart:

Select the Home Organization Chart:

Choices display after required parameter is selected:

**List Value Prompt** shown below – select options from the list(s) displayed:

**Text Box Prompt** User manually enters the values into the box

Enter the Organization:
**List / Value Prompt**

A list value prompt supports multi-select with (click + Shift) or (CTRL + Click) action.

Click first choice in list, shift + click final item in list for consecutive items

Select first item, Ctrl + Click on additional items

**Search and Select Prompt** User defines how to search for values, with the ability to search as many times as they want and can add items from different searches to complete the selection. User moves the desired choices from the Results box to the Choice box.
**Example: Multiple Prompts on one Parameter Page**

- **Single Select**
  - Drop Down Prompt

- **Text Prompts**
  - Cut and Paste from an Excel Spread Sheet

- **List Prompt**
  - Search by Name
    - LAST NAME “Leon”

- **Date Prompts**
  - (Year- Month-Day)
  - Search by Name
  - This is a multi-select prompt, not all name prompts are multi select

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**Date Prompts**

Type date in: If you don’t use this exact format, the report won’t execute properly.

Better to choose from the calendar…

<table>
<thead>
<tr>
<th>Select the Range for Position Personnel Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>From:</td>
</tr>
<tr>
<td>Feb 5, 2013</td>
</tr>
<tr>
<td>To:</td>
</tr>
<tr>
<td>Sep 5, 2013</td>
</tr>
</tbody>
</table>

1. Select Year
2. Select Month
3. Select Day
Tree Prompt

Click on the plus button to the left of the item to expand hierarchy, continue to click until desired level is found. These prompts provide multi-select capability:
Reporting Exercise 1:

- From Team Content select the folder labeled TTU Finance
- Select folder labeled All Finance Reports
- Select FI002 Revenue Expense Budget Pools by FOP
- Enter required parameters as shown:

![Report FI002](image)

- Enter optional parameters as shown:

![Optional Parameters](image)

**Note:** Cognos won’t recognize if the parameters are not in agreement. Therefore, the report will execute, but won’t return data. Best to review what you entered before you hit finish.

Select Finish at the bottom
Options from Within a Rendered Report

Resetting Parameters

Using the “Run As” icon in the upper left section of the application toolbar you access the following options:

- Choose a different format for the report
- Reset prompts to run with different parameters

Choose the option to “Reset prompts and run”

Utilizing the Organization Manager Search parameter, search on the last name “Akins”

Select Finish
**Change Report Format**

Sometimes after a report has been executed, there is a need to have it in a format other than that which it was rendered in, i.e. PDF for printing, Excel for data manipulation.

To change the format, select the drop down as shown in the screenshot below. Choose the desired output.

CSV format in Excel provides only rows and columns without the formatting in the heading, often the preferred output for data manipulation.

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**Save as Report View**

This option lets you save the report output as was provided upon execution. The parameters used to execute the report will be saved.

Select the disk icon in the upper left of the top menu bar. In the drop down choose “Save report as report view…”

In the window that opens, the report name will populate the “Name” field with a default report name. You may rename the report or you may insert a date or other identifier as shown on the following page. Within “Location”, select “My Folders” if not prepopulated. Click OK.
Changing Reports

You may select a different report to execute while viewing a report within the report pane.

- From the left menu, select the “Team Content” Folder. Then choose a different report from the folder currently being used.

- Select either icon in the upper application bar
  - Choose a different “Report Type”
  - Choose a different “Report Category”

Recently Viewed

Utilize the “Recent” folder found in the left menu to execute a report that you have used in the past.

- Click on the report link to access the parameter page.
  - During current login, the executed report displays
  - After logging out and logging in again, only the parameter page displays
  - If choosing a report that has been saved as a report view you will be linked to “My Content”

To remove a report from the “Recently Viewed” folder, hover over the report link and select the ellipsis that appears to the right of the report. In the box that opens, choose “Remove from recent”.

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Application Tool Bar

Utilize the drop down located in the center of the Application Tool Bar to select a report that you have executed during your current session of Cognos. These reports will not be visible if you log out and log in again, creating a new session.

Report View of F10 … - … Report

My Preferences

On the upper right hand side of tool bar is an active link attached to the user name. Click on the person icon to activate the dropdown.

Choose “My Preferences”

My preferences

In this area you are able to select the desired default report format. HTML is the system’s recommended choice.
Reporting Exercise 2

Select FI026A - [Link to FI026A - Advanced Op Ledger Transaction Report]

Enter the Required Parameters as shown below:

- **Year is always entered with a four digit identifier i.e. 2016.**
  - Fiscal year runs from September 1 to August 31;
    - Fiscal Year 2016 is from Sep. 1, 2015 to August 31, 2016
  - Payroll Calendar runs from January 1 to December 31 of the current calendar year.

- **Posting / Fiscal Period is always entered with 2 digit identifier i.e. 03**
  - Posting Period 01 is Sept., 02 is Oct., 03 is Nov., etc.

Enter the Optional Parameters as shown below:

Select **Next** in the upper left corner.
Many Reports have multiple Parameter Pages to help you pinpoint your data and format your report.

Select sort order – this is helpful for reconciliation as the selected sort order is what causes grouping within the report output:

![Sort Options](image)

Select **display options** – choose if items appear in report or not. It may be helpful to see descriptions of Organization and Commodity.

![Display Options](image)

Select **Finish** at the top left of the report

![Finish Button](image)
My Content: Executing from a Report View

Select the “My Content” icon. To view the saved version of the report, click on the link for the desired report view.

Other Options from a Report View

The report opens with the saved view. You may execute a report from a report view and get current data and you can also change the parameters and receive information for a different data set.

To execute using same parameters, choose the report link as shown above. Choose the Run icon found in the upper left of the application toolbar when viewing the report. The parameter page populates with saved parameters. You can use these or change the parameters.

After executing from a report view, you may change the format of the report or execute again with different parameters. These options are available by selecting the “Run as” icon in the application toolbar at the top of the window and clicking on the desired option.
Scheduling a Report in Cognos

Cognos has a function which allows a report to be scheduled to run at a later time during the current day or at a later date as well. The report will “run in the background” which means that you will not see it executing and the report will be delivered to you by email or to your “My Content” within Cognos depending upon the delivery method selected. Follow the steps outlined below:

Reporting Exercise 3: Scheduling a Report from Team Content

1. Locate report in “Team Content”
   Team Content> TTU Finance > All Finance Reports
   Click on FI004 Report and open parameter page

2. Select “Recently Viewed” icon; the first report listed should be FI004
   • Click the ellipsis to the right of the report link select “Run as”
3. Do the following:

   - Turn on “Run in the background”
   - Choose desired format: HTML
   - Prompt me: YES because we are running this report with no previously set parameters.
   - Select the “Advanced” dropdown
   - Select “Later”
   - Select the date and time for the report to execute.
   - Select the “Delivery” drop down

4. Select the delivery method.

   - For Email delivery choose “Send report by email”
   - “Attach Report”.
   - Add Recipient
   - Add Subject
   - Add Note
     - Uncheck “Print Report”

5. Select “Done” when finished.
6. You will be returned to the previous page, choose Run.

7. Wait a moment. The parameter page will display on top of the system. Then enter desired parameters, and chose finish.

8. Select Finish

Finish
Reporting Exercise 4: Scheduling a Report from My Content

1. Click on the ellipsis to the right of the report in “My Content”. Select “Run as”.

2. Do the following:

   - Turn on “Run in the background”
   - Choose desired format

   - If you want to run with different parameters, choose “Prompt me”.

   - Select the “Advanced” dropdown
   - Select the “Later” radial button

   - Select the date and time for the report to execute.

   - Select the “Delivery” drop down
3. Select the delivery method.

“Send report by email” and “Attach Report”.

Send to yourself, and me, too!!

FYI: Finance Reports are OK to send. However, don’t send HR reports via mail because that person must have permission to view them.

3. Don’t include a link to the Report
4. Don’t Check Print Report
5. “Save Report”
   - If you save it, then it will overwrite your previously set parameters and data.
   - Depends on what you want to do back at your office (today: NO)

6. Select “Done” when finished.

7. You are returned to the previous page.

Select Run.

8. Next, you will be directed to the parameter page to enter your desired parameters.
   - Remember, the parameter page will appear “on top” of the system.
   - Double Check that your parameters are set correctly
   - Select Finish. Report will be rendered at date and time entered.
My Schedules and Subscriptions

Select the link labeled “My schedules and subscriptions” as shown below:

- Upcoming – using calendar select the day to view reports scheduled
- Past – view reports that have executed
- Current – view reports currently running

To cancel your scheduled report, click the ellipsis to the left of the report name, then “Suspend”.

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