

Cognos BI AdHoc Reporting

Course Number FMS103
NUIT Administrative Systems



NORTHWESTERN
UNIVERSITY

Context

Cognos Query Studio can help us...

- Answer questions about financial activity that:
 - Are not answered in canned reports
 - Require analysis of large data sets
- Create custom displays of existing reports



Objectives

- Navigate to Query Studio
- Tour the Query Studio interface
- Create AdHoc queries using Cognos Query Studio
 - Given the question and data elements we need
 - Following the method recorded in the training guide
 - Using four important terms to describe the data
- Publish queries for collaboration and sharing



Where do you find Cognos?

The screenshot shows the NUPortal website interface. At the top, there is a navigation bar with links for Business Intelligence, CAESAR, Collaboration, Course Management, Directory, Email, Events, FASIS, Library, NetID, News, Time Entry, and WildCARD. Below this is the NUPortal logo and a search bar. On the left, there is a sidebar menu with options like myNU, News and Events, Facilities, Financial, Human Resources, Research, Services, Student Services, and NUPortal Help. The main content area has tabs for Facilities and FAMIS Self Service. A large callout box with the text 'Access Cognos from the NUPortal.' and an arrow points to the 'Cognos' link in the 'System Login' section. Other links in the 'System Login' section include Training Environment, NUFinancials, InfoEd, FAMIS Admin, NUPlans Contributor, and NUPlans Web. Below the 'System Login' section is the 'Facilities Management Resources' section with links for Facilities Management Home, FAMIS Web - Central FM, Key Authorization Form, Parts Alias Look-Up, and SIMS Crosswalk. At the bottom of the main content area is the 'FAMIS' section with a note about submitting service requests.

Alternate access is from the FFRA Financial Systems Gateway at: <http://ffra.northwestern.edu/gateway/>

Where is Cognos Query Studio?

NU Business Intelligence

Reporting and Analytics Solutions for Northwestern University

Click Query my data

My Content



My home



IBM Cognos content

My Actions



Query my data

Show this page in the future


Don't see Query my data?

- Request "Ad Hoc Query Author" on any FFRA Security Access Form



Where do you go from there?

Select a package (Navigate)

Help 

Select which package to use.






[Search](#)

























Recently used packages:

[FAMIS_ADHoc](#)
[PS_EPM_ADHOC](#)
[InfoEd_Adhoc](#)

List of all packages:

[Cognos](#) > **Public Folders**

Entries: -  |    

Name 
 Finance Facilities and Research Administration
 FAMIS_ADHoc 
 FASIS Reporting (Shared)
 GO Data Warehouse 
 GO Sales 
 GO Sales (analysis) 
 GO Sales (query) 
 GO Sales and Retailers 
 GO Finance 
 Great Outdoors Company 
 InfoEd_Adhoc 
 PS_EPM_ADHOC 
 Samples

Select a report
“package.”

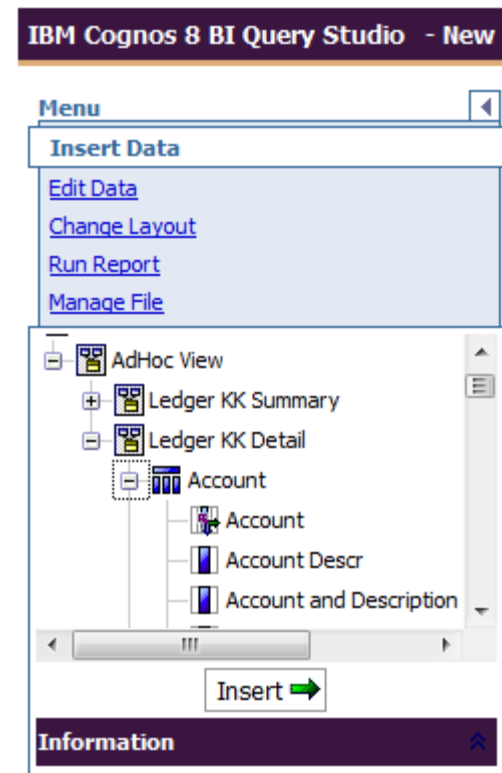
Select:

- PS_EPM_ADHOC for NUFinancials
- FAMIS_ADHoc for Facilities Management
- InfoEd_Adhoc for grant proposal

The next time you pass through this page, your selection appears in “Recently used packages.”

What is a “Package?”

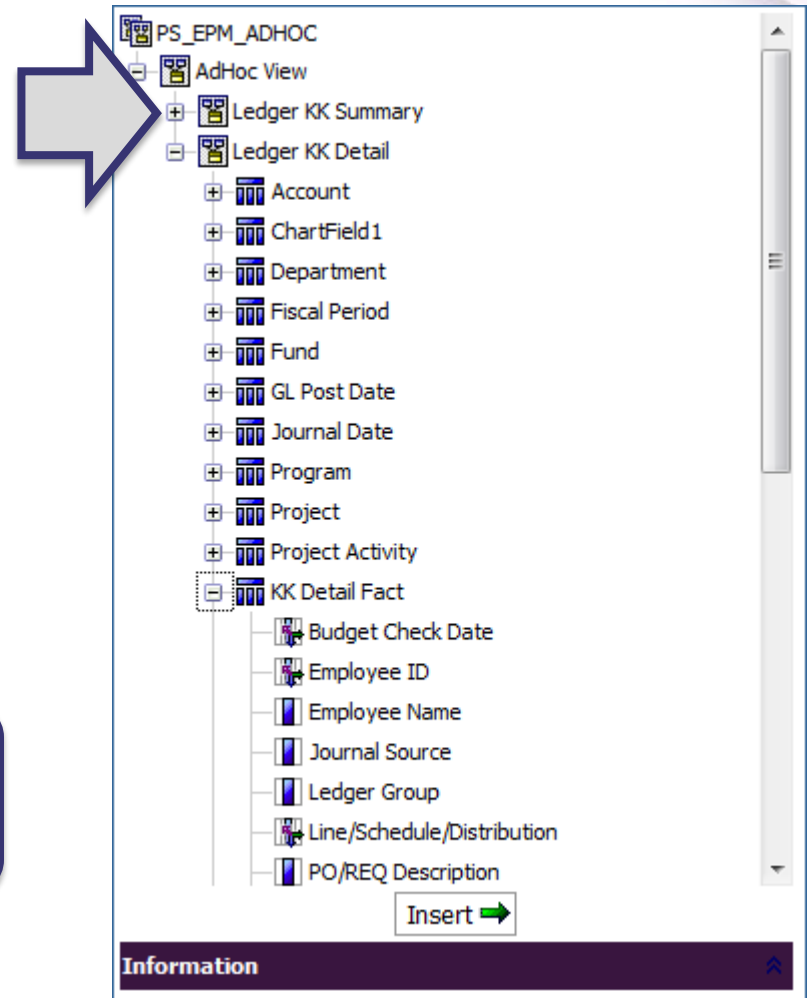
- Cognos gives you access to data through a “package.”
 - Packages are mapped to “stars” in the data warehouse
 - Relatively simple interface
 - Click to insert...
 - Data elements
 - Pre-built objects
 - Filters
 - Prompts
 - Onto a report canvas
 - No SQL required



NUFinancials Package

- Ledger KK **Summary** star
 - Summarized financial figures
 - Pre-built calculations
- Ledger KK **Detail** star
 - Financial activity
 - Transactions

You may use one star at a time.



FAMIS Package

- Adhoc 2.0 View
 - Labor
 - Materials Issued
 - Misc Cost
 - Cost Recovery

You may use one star at a time.



The screenshot shows a software interface for the FAMIS package. At the top, there is a "Menu" bar with a left-pointing arrow. Below it is a "Insert Data" menu with the following options: "Edit Data", "Change Layout", "Run Report", and "Manage File". Below the menu is a tree view for "FAMIS_ADHoc". The tree view has a plus sign next to "FAMIS_ADHoc" and a minus sign next to "Adhoc 2.0 View". Under "Adhoc 2.0 View", there are five items, each with a plus sign and a star icon: "Adhoc View", "Labor Star", "Materials Issued Star", "Misc Cost Star", and "Cost Recovery Star". At the bottom right of the interface is an "Insert" button with a green right-pointing arrow. At the bottom of the window is an "Information" bar with an up-pointing arrow.

InfoEd Package

- Award Detail
- Award Effort
- Award Summary
- Award Summary by Investigator
- Request Detail
- Request Effort
- Request Summary
- Agreements
- E Forms



The screenshot displays the InfoEd Package interface. At the top, there is a "Menu" dropdown menu with a left-pointing arrow. Below the menu, a list of options is visible: "Insert Data", "Edit Data", "Change Layout", "Run Report", and "Manage File". Below this list is a tree view structure. The root node is "InfoEd_Adhoc", which is expanded to show a sub-node "Requests & Awards". Under "Requests & Awards", there are several items, each with a plus sign and a small icon: "Award Detail", "Award Effort", "Award Summary", "Award Summary by Investigator", "Request Detail", "Request Effort", and "Request Summary". At the bottom of the tree view, there is an "Insert" button with a green arrow pointing to the right. At the very bottom of the interface, there is a dark purple bar with the word "Information" and an upward-pointing arrow.

Method

In general, build queries in this order.

1. Insert and filter dimension elements
2. Insert filters and prompts
3. Insert facts and calculations
4. Apply finishing touches
5. Save, run, collaborate, and share



Where do I save my reports?

- Save to “My Folders”
 - Personal access only
- Save to “Scratch”
 - Collaborate with other authors
- Save to “NUFin AdHoc Reports”
 - Share finished queries with end users
- Publish at your convenience



What are the roles?

Use the General Security Access form.

- Ad Hoc Query Author
 - Access to Query Studio to create, collaborate and share reports
 - Access to run reports (same as below)
- Ad Hoc Query Runner
 - Access to Public Folders > AdHoc Reports folder to run reports created by authors




Resources

- Reporting Training Curriculum
 - <http://ffra.northwestern.edu/training/materials.html>
- IBM Cognos Help
- Open Labs
- HELP @ 1-HELP, Option 2



Next Steps

- Please evaluate the course. Thank you!
 - Click the Home icon on your browser. 
 - Click Training Evaluation.
 - Select course number FMS103.

