

Navigating Cognos Query Studio

Cognos Query Studio allows you to build custom ad hoc reports that you may share with other Cognos users.

This guide shows and defines the menus, toolbar, icons, and navigational features of the Cognos Query Studio interface.

Contents

This guide addresses the following tasks and topics:

- Access Cognos Query Studio
- Select a report package
- Recognize icons on the Query Studio toolbar
- Recognize features of the Query Studio menus including:
 - Insert Data Menu
 - Edit Data Menu
 - Change Layout Menu
 - Run Report Menu
 - Manage File Menu

You may want to print the quick reference on page 9 of all Query Studio icons.

Where to get help?

For assistance, contact NUIT Support Center at 847-491-HELP (4357), or email consultant@northwestern.edu

Who has access?

This application is for experienced financial users with an understanding of their budgets, financial activities, and existing pre-configured reports.

You must request access to Query Studio using the general systems security form located on the Finance Facilities and Research Administration (FFRA) website > Security Access. Select from the two security roles below.

Query Author security role:

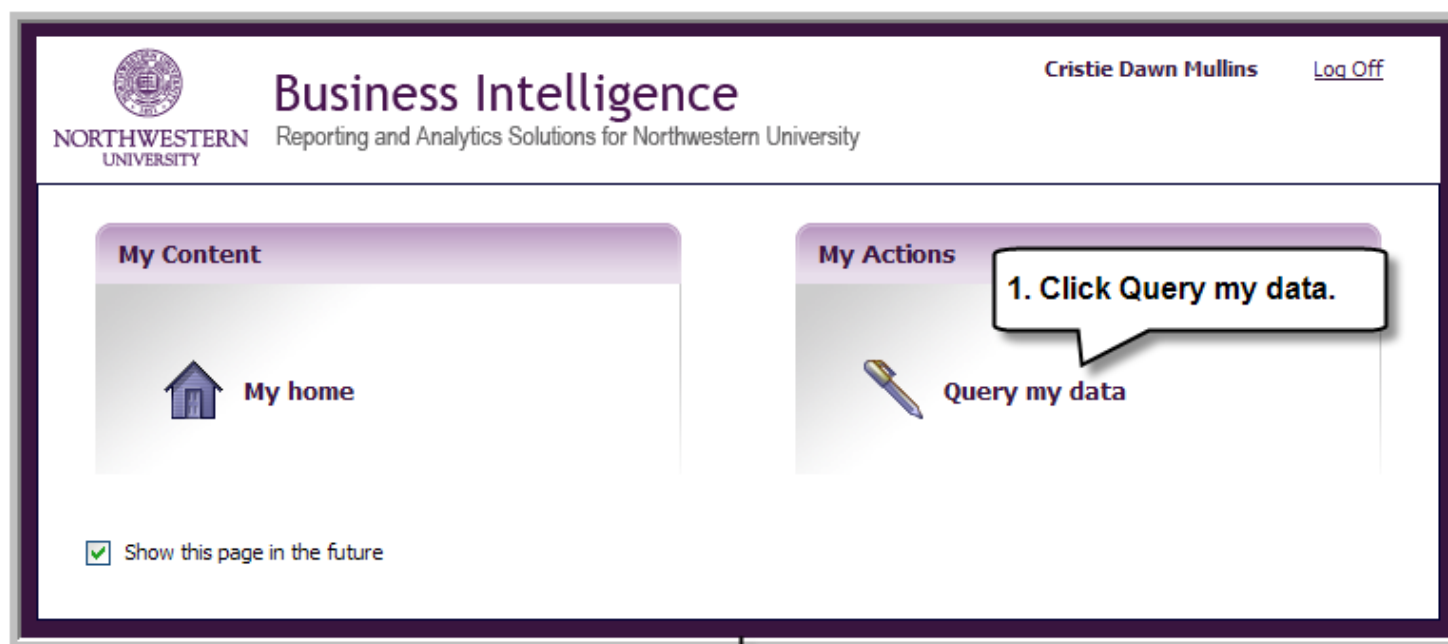
- Build Ad Hoc reports
- Run Ad Hoc reports
- Use the drill-up or down-drill *NU Dept ID Master Tree* functionality

Ad Hoc Query Runner security role:

- Run Ad Hoc reports from *Cognos Connection > Finance Facilities and Research Administration Reports > NUFin Ad Hoc Reports* folder

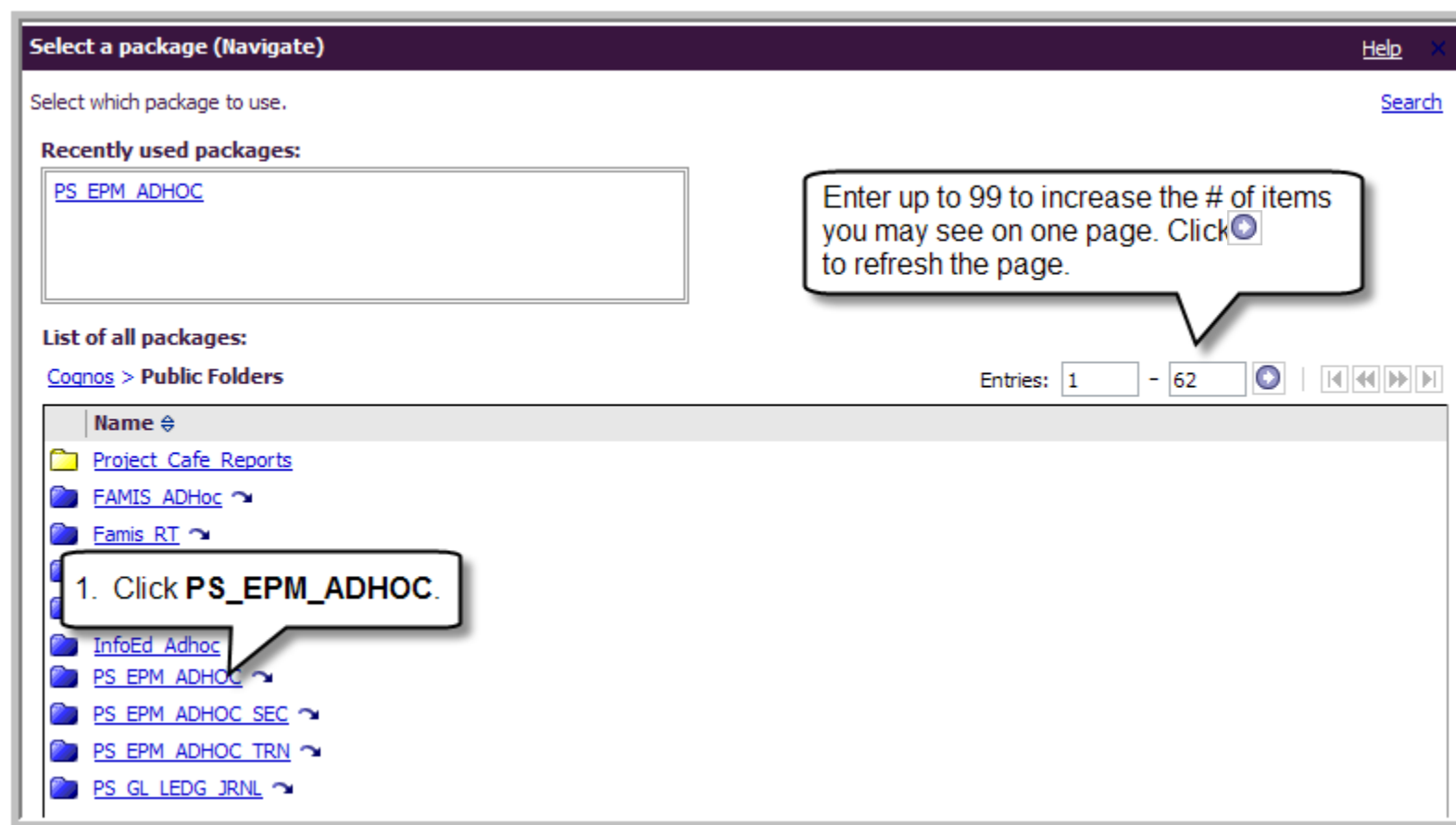
Step 1: Access Cognos Query Studio

Quick navigation: From the [NUPortal](#), select Financials > System Login > Cognos > Query my data > PS_EPM_ADHOC. From the [Financial Applications Gateway](#), click Cognos Reporting.



Note: If you do not see *Query my data* as an option on this page, you will need to update your security to get access.

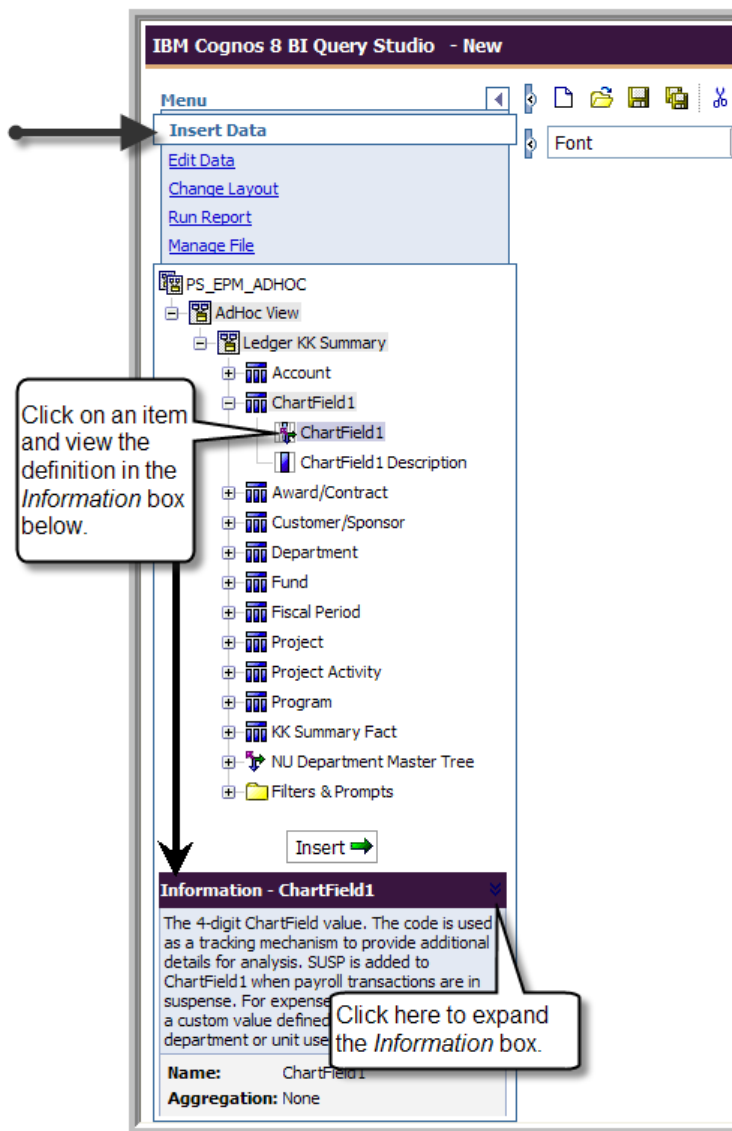
Step 2: Select a report package









Result: After you select the package, the Query Studio interface appears.

Note

The first time you open PS_EPM_ADHOC, you must select it from the list of packages. In the future, it appears on the *Recently Used Packages List*. You may select it from here.



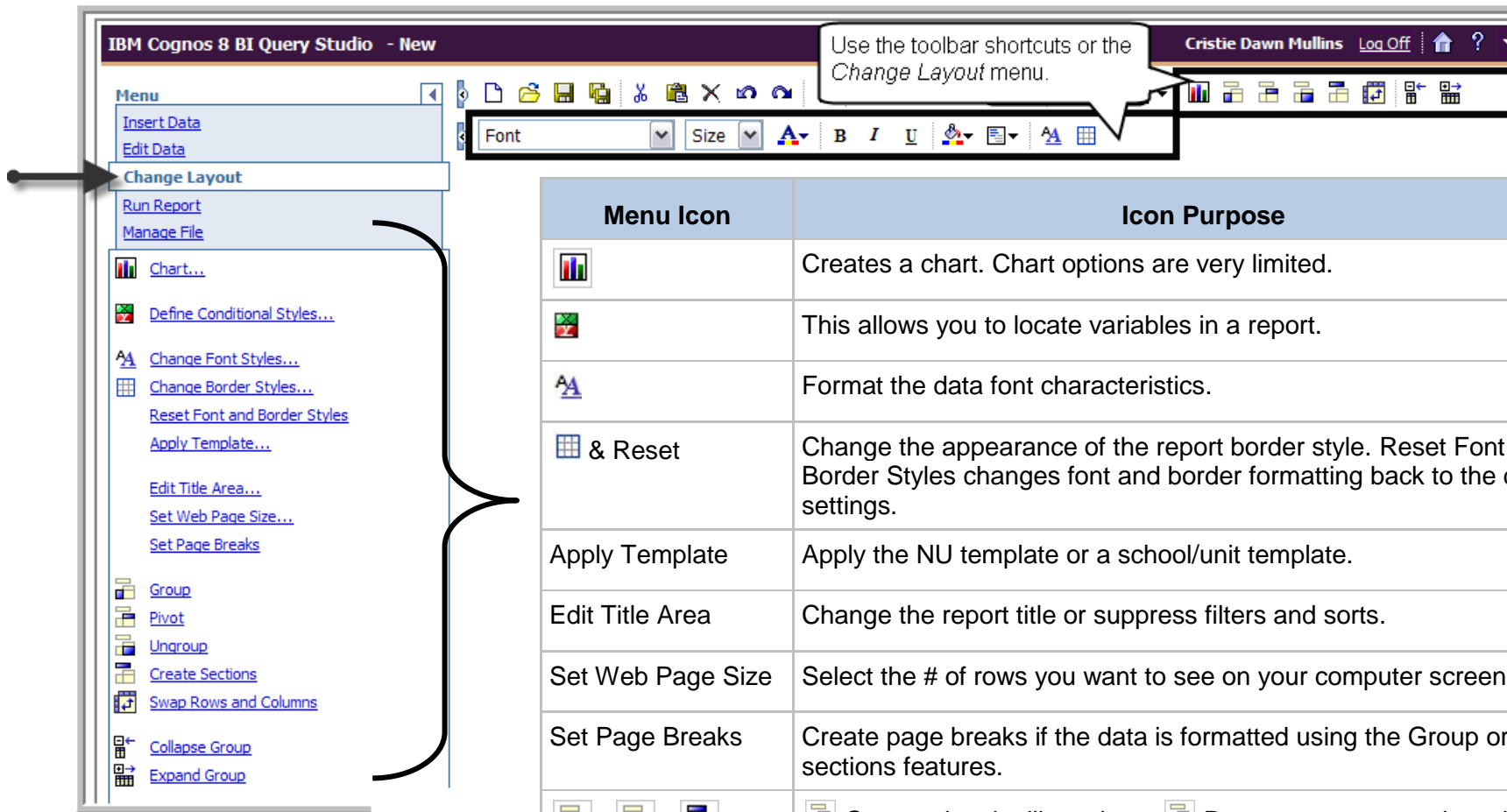
Menu Icon	Icon Purpose
	Star - Contains everything you can use to build a report. Stars are thematic; they contain certain kinds of information. The star we are using for this guide is the <i>Ledger KK Summary</i> star. The <i>Ledger KK Summary</i> star contains summary-level financial information. This means you can see totals by chart string, but you cannot see transactional details.
	Dimension - Major category of information. All dimensions use this symbol. However, the <i>KK Summary Fact</i> menu also uses this symbol. You can tell the difference between a dimension and the <i>KK Summary Fact</i> because the fact only contains calculations. Beneath an expanded dimension menu, you will see element columns that can be inserted into the report. For example, <i>ChartField1</i> is a dimension.
	Element - Column of information that acts as a descriptor. Elements provide information about the dimension. For example, the <i>ChartField1 Description</i> element provides information about the <i>ChartField1</i> dimension.
	Calculation - Column of dollar amounts. These columns of dollar amounts are called calculations because Cognos performs the work of adding, subtracting, or multiplying different numbers together to provide the amount.
	Tree – a hierarchical grouping of information. Provides drill-up and drill-down functionality, which allows you to view different subsets of the whole data set. Ex: view data for the whole school or drill-down to a single department within the school.
	Level of a tree – each level of the tree contains a subset of the whole data set. Select the level that contains the data you need.

Overview of the Edit Data menu

Use buttons from the toolbar or the *Edit Data* menu on the left.

Menu Icon	Icon Purpose
Combine Filters	Use filter to narrow down the criteria. Data that does not meet the filter criteria is excluded. Use Combine Filters to customize your filters with the AND, NOT, and OR functions.
	Suppress rows or columns with zeros, empty cells, divided by zeros, or overflow values. (To view the entire report, click Change Layout > Set Webpage Size > change Number of rows to 50.)
	Sorts selected columns in ascending or descending order.
	Adds a summary calculation to the footer of the selected columns.
	Allows you to specify the format of numbers and text.
	Create a manual calculation.
Define Custom Groups	Create a group and define what data and description belongs to the group. Inserts a column with group description names at row level.
Go to...	Drill-up or down through data levels if a level of the NU Department Master tree is inserted in the report. The Go to related information icon is not currently active.
Rename Column Heading	Either double-click a column header, or single-click it and then select Rename Column Heading to create a custom column name.
	Temporarily removes a column. / Inserts column before the column. / Permanently removes a column from the report.
	Undo previous actions. / Redo previous actions.

Overview of the Change Layout menu



Menu Icon	Icon Purpose
	Creates a chart. Chart options are very limited.
	This allows you to locate variables in a report.
	Format the data font characteristics.
& Reset	Change the appearance of the report border style. Reset Font and Border Styles changes font and border formatting back to the default settings.
Apply Template	Apply the NU template or a school/unit template.
Edit Title Area	Change the report title or suppress filters and sorts.
Set Web Page Size	Select the # of rows you want to see on your computer screen.
Set Page Breaks	Create page breaks if the data is formatted using the Group or Create sections features.
/ /	Groups data by like values. Removes groups and sections. Organizes data into sections according to your selection.
/	Pivot creates a crosstab using the column you select. Data is reorganized. Switches the column headings with the row headings when a pivot table exits.
/	Hides all columns except \$ columns from the report. Shows all columns and expands the data.

Overview of the Run Report menu

Click *Run with All Data*, or select additional options from the *Run Report* menu.

Menu Icon	Icon Purpose
	Run the report using all data.
	Run the report using a limited data set. This improves performance during report building. You can remove this option and run with all data at any time.
	Run the report without using any data. The fastest option for performance while building a report. You can remove this option and run with all data at any time.
View in PDF Format / Specify PDF Options	Click this link to run the report to the specified format. For Excel reports, you may need to hold down the CTRL key until the save dialog box appears. Click Specify PDF options to format the PDF output.
View in Excel 200x	2007- all report data is displayed on single worksheet; 2002 - all report data broken up into multiple worksheets within a single Excel workbook; 2000 – all data displayed on a single worksheet.
View in CSV	The report is formatted as a CSV file.
View in XML	The report is formatted as an XML file.
Advanced options	Generate footers, suppress duplicates, and enable or disable drill-through functionality.






































































Overview of the Manage File menu

Use buttons from the toolbar or the *Manage File* menu on the left.

To return to Cognos Connection, click the **Home** icon.

Menu Icon	Icon Purpose
	Create a new report.
	Open an Ad Hoc report saved in another location.
	Save the report.
	Save the report with a new name.
Report Definition	Lists all the items and filters used in the report.
My Preferences	Define the default settings for report building. Categories include: running reports with all or limited data; using a default template; and filtering behaviors.

Cognos Query Studio Icons Quick Reference

Icon	Description	Icon	Description
 / 	 Creates a new report; blank stage for report building. /  Open an existing report.	 / 	 Creates a crosstab (pivot) by placing the selected items in the crosstab columns. The remaining items appear as rows. /  Creates a section header with grouped items appearing below.
 / 	 Save the report /  Save the report with a new name.	 / 	 Groups items and removes duplicates.  Removes groups or sections; shows duplicates values.
 /  / 	 Cut removes an item so that it can be pasted. /  Paste the column before another selected column. /  Delete an item from your report.	 /  / 	Swaps rows with columns in a crosstab (pivoted) report. /  Hides all non-dollar columns from the report. /  Unhides all non-dollar (fact) columns.
 / 	 Undo an action.  Redo an action.		Navigation to Cognos Connection.
	Run the report to an HTML output.	 / 	 Change font. /  Change table border styles.
	 Suppress rows or columns with zeros, empty cells, divided by zeros, or overflow values. (To view the entire report, click Change Layout > Set Webpage Size > change Number of rows to 50.)	 / 	 Package - collection of items used to create reports. Contains one or more stars. /  Star - grouping that contains everything used to build reports.
 / 	 Filter data to include a subset. Exclude unwanted data. /  Sorts column data.	 / 	 Dimension menu- category of insertable items. Displayed as menu in the interface. /  Element - a column used in a report.
 / 	 Totals data and adds the amount to a footer row of the selected columns. /  Create a manual calculation. Ex: add two columns.		 Tree menu. When a level () of the tree is inserted, drill up/down functionality is activated. A tree level is one subset of the entire data set.
 /  / 	Move between levels of data within the NU master ID tree.  Go down a level. /  Go up a level.		Calculation – inserts a column of dollar or numeric data that can be calculated.
	 Converts report data into a selected chart type.	 / 	Format the column numbers. /  Not used.