

# Introduction to Cognos

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TEXAS TECH UNIVERSITY

**Data Management  
for Financial Resources™**

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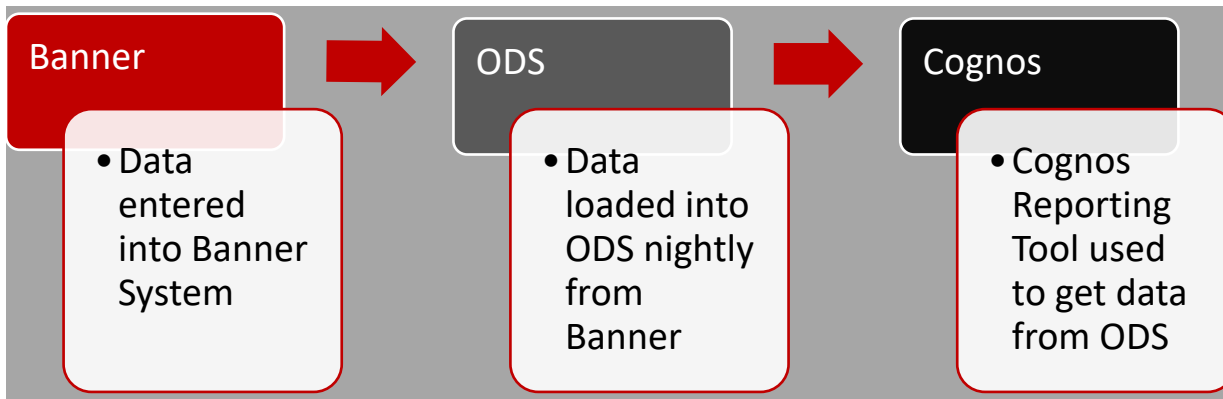
DMFR Portal <https://portal.dmfr.ttu.edu>

## What is Cognos?

Cognos is the reporting tool used at Texas Tech University to retrieve information that is stored in Banner and present it in a usable format. The data provided is through end of day, the previous business day.

Data flow for Cognos:

- All data is entered into the Banner System
- Data is loaded nightly into the ODS (a data warehouse) from Banner
- Cognos is pointed to the ODS to extract the information based upon parameters entered in parameters



## Report Access

### **Finance Reports**

If a person is an employee of TTU with an active eRaider, they can 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**

Access to Human Resources is granted by the Financial Manager of the Organization using the TEAM Application (**TeamApp**) and can be 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. **Register and Complete the online FERPA Training**
3. **Register and Complete Record Management/View Access for student records/Registrar**

#### **Dashboard Training**

- If you are unable to register, please email [hrs.systems@ttu.edu](mailto:hrs.systems@ttu.edu) for technical assistance!
- If you have any questions, contact [kristi.fonseca-williams@ttu.edu](mailto:kristi.fonseca-williams@ttu.edu) in the Office of the Registrar.

## Accessing the Cognos System

### From Raiderlink:

Select the tab “A&F Work Tools,” then select **Reports** from any one of the channels:

The screenshot shows a navigation menu on the left with the following items: Employee, News/Events, Available Budget, A&F Work Tools (highlighted with a red box), and Payroll & Tax. The main content area is divided into two columns: DMFR and Budget. The DMFR column has a link to 'Visit DMFR Website' and a list of links: DMFR Customer Portal, dmfr.support@ttu.edu, Reports (Cognos) (highlighted with a red box), Fringe Projection Application, and Knowledge Base. The Budget column has a link to 'Visit Budget Website' and a list of links: ambud@ttu.edu, Cognos Budget Reports (highlighted with a red box), Budget Revision System, Approval Tracking System, and Budget Prep.






## Cognos Home Page

The screenshot shows the IBM Cognos Analytics home page. The header includes 'IBM Cognos Analytics' on the left, 'Cognos' with a dropdown arrow in the center, and navigation icons (three dots, bell, user, question mark) on the right. A sidebar on the left contains icons for home, search, folders, reports, and a clock. The main content area features a large background image of a cowboy on a horse. In the center, there is the Texas Tech logo and the text 'Texas Tech' and 'Welcome to Cognos Analytics!'. Below this, there are two sections: 'Getting Started:' with links to 'TTU DMFR Training Videos' and 'IBM Training Videos', and 'Need Support?' with links to 'TTU Support Portal', 'HSC Support Portal', and 'El Paso Support Portal'.

## Accessing Reports

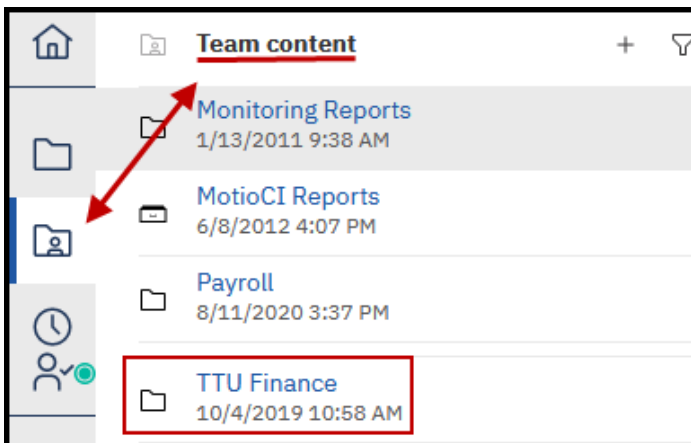
Reports are housed in the folders located in the left navigation menu: My Content, Team Content, and Recently Viewed.



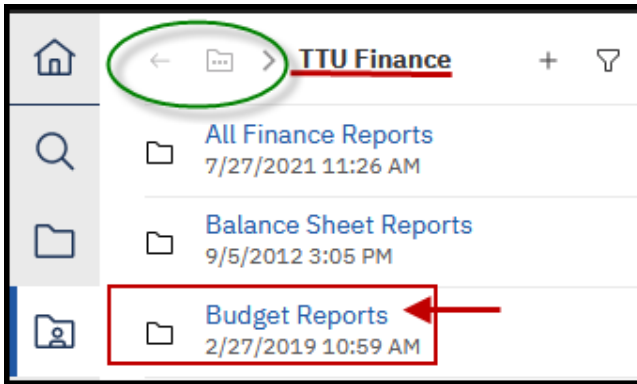
-  **Home** will return the user back to the homepage.
-  The **Search** feature does not function. It may yield a report in the search, but it may not be the correct version to use.
-  **My Content** holds report views that have been saved by the user.
-  **Team Content** houses various shared and private folders, standard reports, and Cognos packages.
-  **Recent** houses reports that the user has previously executed.

## Team Content: TTU Folder Structure

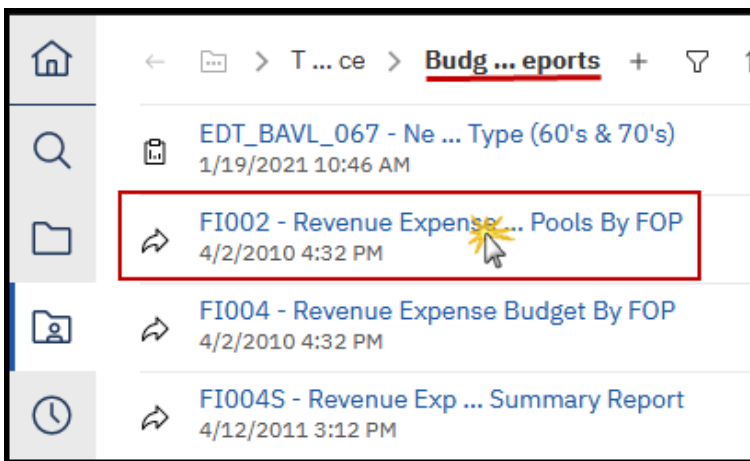
The folders in the left menu house reports for the users to access. The reports that have been created for departments to use are housed in the **Team Content** folder, as shown below. Select the **Team Content** folder to access the desired report category.



Select the **Report Type** within the selected **Category Folder**. Note the breadcrumbs to the left of the TTU Finance header.

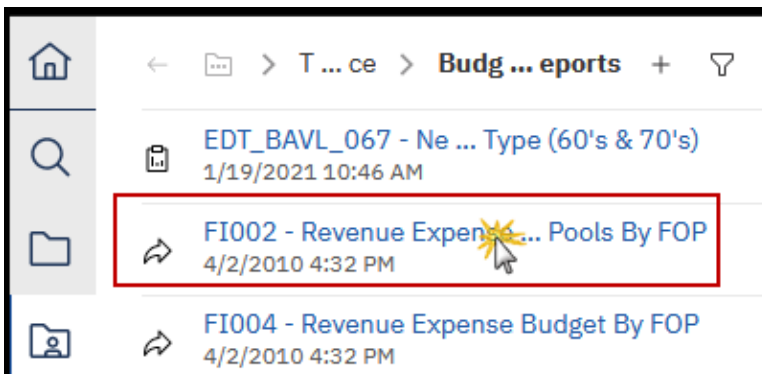


Select desired Report from the Report Type folder. A report can be found in more than one folder if it can be used for more than one purpose.



## Executing a Report

Once the desired report has been located, click on the report name to access the parameter page.



## Report Parameter Pages

The parameter page provides the user the opportunity to enter criteria into necessary parameters, so the report generates desired output. Parameters can be required (circled in red) or optional (circled in green). Cognos is not tabbed-friendly; use your mouse to move from one parameter to another.

1. A Required parameter is identified with an asterisk, arrow or dotted line below it, or a combination of them:



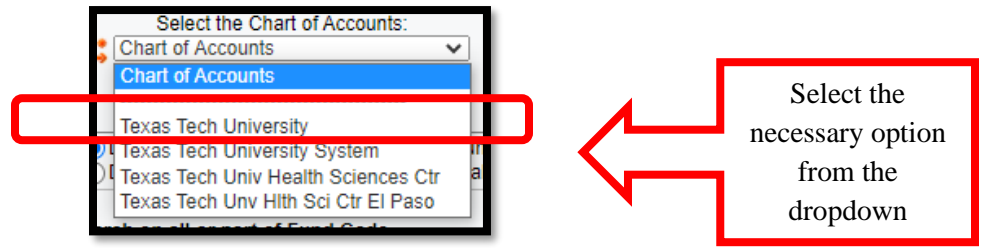
2. The Option to “Finish” the report will not display until all required parameters have a value.

## Types of Parameters:

Text Box Prompt: User manually enters the values into the box.

**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.

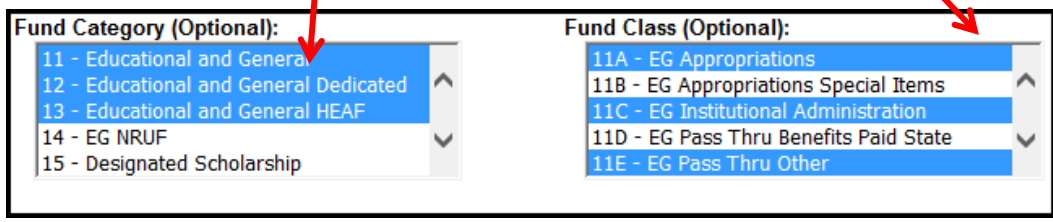
**Drop down Value Prompt**



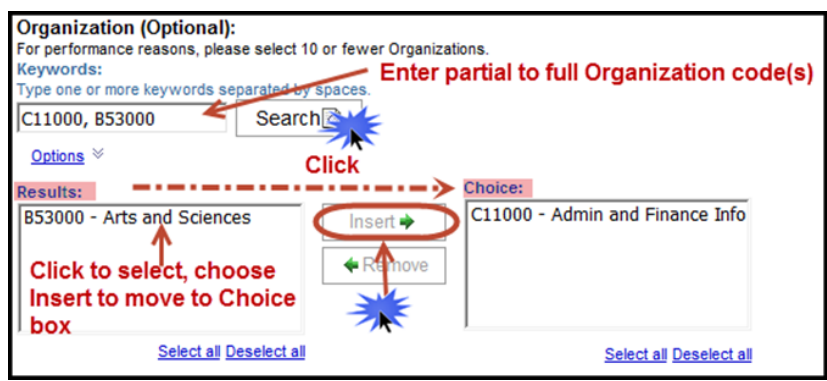
**List / Value Prompt:** A list/value prompt supports multi-select with (Click + Shift) or (CTRL + Click) action.

Click first choice in list, **Shift + Click** final item in list for consecutive items.

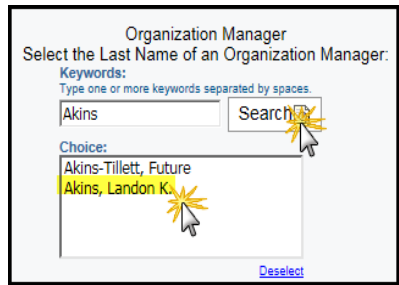
Select first item, **Ctrl + Click** on additional items



**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. The user moves the desired choice(s) from the **Results** box to the **Choice** box.





**Note:** When searching for a person's name, it is best to use the legal last name only



**Date Prompts:** Be aware, if you type in the date, it is case sensitive. If you do not use this exact format, the report won't execute properly. It is better to choose from the calendar feature.

Select the Range for Position Personnel Date:

From:  


To:  

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

Only Show Employees Terminated since:  
(Optional)

2013						
Jan	Feb	Mar	Apr	May	Jun	
Jul	Aug	Sep	Oct	Nov	Dec	
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

4. Select Year
5. Select Month
6. Select Day

**Tree Prompt:** Click on the crosstab  to the left of the item to expand the hierarchy. Continue to click until the desired level is found. These prompts provide the multi-select capability.

Choose ORGN from the Hierarchy Below

- S - SS - Texas Tech University System Admin
- T - TT - Texas Tech University

Fund Hierarchy:

- Fund Hierarchy(All)

Choose ORGN from the Hierarchy Below

- T - B - Provost and Academic Affairs
  - T - B1 - Provost and Academic Affairs Lbbk
    - T - B00 - Provost and SVP Academic Affairs
    - T - B12 - Academic Affairs
    - T - B13 - International Affairs
    - T - B14 - Information Technology and CIO
    - T - B15 - Museum and Heritage
    - T - B18 - Financial Planning and Analysis
    - T - B51 - College Ag Sci and Natural Resource
    - T - B52 - College of Architecture
      - T - B5200 - Architecture
        - T - B52AA - Architecture
          - T - B52000 - Architecture
          - T - B52001 - Gary Smith
          - T - B52002 - David Driskill
          - T - B52003 - PI Saif Ul Haq
          - T - B52004 - Elizabeth Louden
          - T - B52005 - PI Eric Sinzinger

Fund Hierarchy:

- Fund Hierarchy(All)
  - T - Texas Tech University
    - 10 - Current Unrestricted
    - 20 - Current Restricted
      - 21 - Federal Restricted
      - 22 - State Restricted
        - 22A - Restricted Other States Government
          - 22A001 - Brace II
          - 22A006 - Role Of Sns1 And Athkt1

[Deselect all](#)



# Reporting Exercise: 1A

## 1. Access the FI002 Report



## 2. Enter required parameters as shown:

Select the Chart of Accounts:	Select Beginning Fiscal Year:	Select Ending Fiscal Year:	Select Ending Fiscal Period:
Texas Tech University	2021	2021	14 - All Periods

## 3. Enter optional parameters as shown. Remember to capitalize alpha characters.

Enter Fund:	Enter Organization:	Enter Program:
	C11000	

## 4. Select Finish, at bottom left.

Cancel	< Back	Next >	Finish
--------	--------	--------	--------

**At the Bottom**

*\*\*Note: A report will not generate data if the parameters are not in agreement. You will receive a report page with a header but without data*

## Report Output

The screenshot below shows an executed report.

Report: FI002 09/01/20

**Texas Tech University**  
Revenue Expense Budget Pools By FOP  
For Period Beginning September 1, 2020 and Ending August 31, 2021

[Return to Prompt](#)

Fund: 11A002 General Admin and Student Services	Orgn: C11000 Data Mgmt for Financial Resources	Prog: 600 Institutional Support Expense	Fund Manager: Sloan, Noel A. Orgn Manager: Akins, Landon K.
--	---	--	--

Reductions

Budget Pool	Budget Pool Description	Budget Original	Budget Adjustment	Budget Current	Rev/Exp Actual	Exp Encumbrance	Rev/Exp Total	Fav Unfav
6A2	SW Staff Salaries Budget Pool	681,724.00	0.00	681,724.00	0.00	0.00	0.00	681,724.00
6A5	SW Longevity Budget Pool	14,073.00	0.00	14,073.00	0.00	0.00	0.00	14,073.00
<b>Reductions - Total</b>		<b>695,797.00</b>	<b>0.00</b>	<b>695,797.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>695,797.00</b>

Created by: DMFR - 1 - Run By: Jody Leon

Top Page up Page down Bottom

Sometimes, there are multiple pages of data. In HTML format, use the Page **Down**/**Page Up** buttons to view it all.

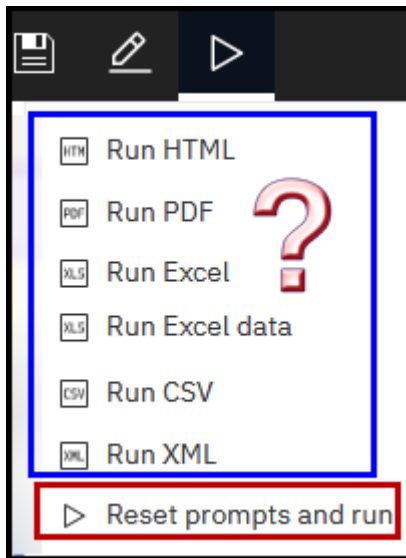
## Options from Within a Rendered Report:

### Changing the Report Format

Using the “Run As” icon in the upper left section of the application toolbar, you can choose a different format for the report. PDF is the preferred format for printing. Excel is for data manipulation. CSV provides rows and columns without formatting, also used for data manipulation. *Note: Make sure popup blockers are turned off.*

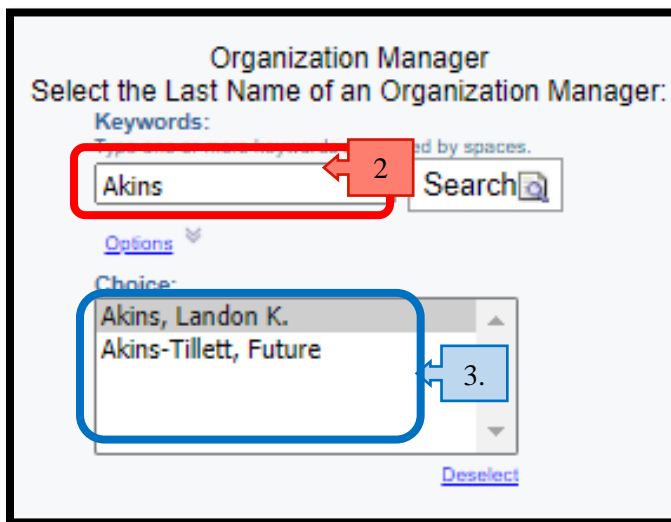
### Return to Parameter Page

To return to the parameter page, within the “Run Drop-down,” select “Reset Prompts and Run.” You are returned to the parameter page to enter desired criteria within provided parameter options.



## Report Exercise 1B: Select Reset prompts and run



1. **Remove/Delete/ Deselect** any previously set parameters.
2. Under Organization Manager, type “**Akins**” and **Search**.
3. Then choose **Akins, Landon K.**

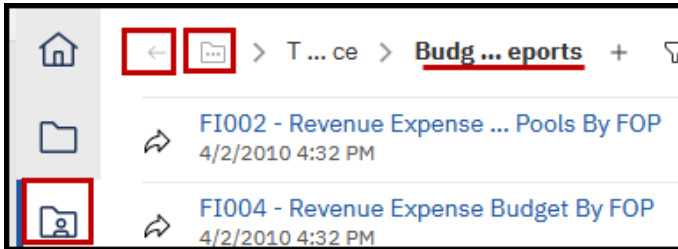


4. Select **Finish** (bottom of the page)

## Selecting a Different Report

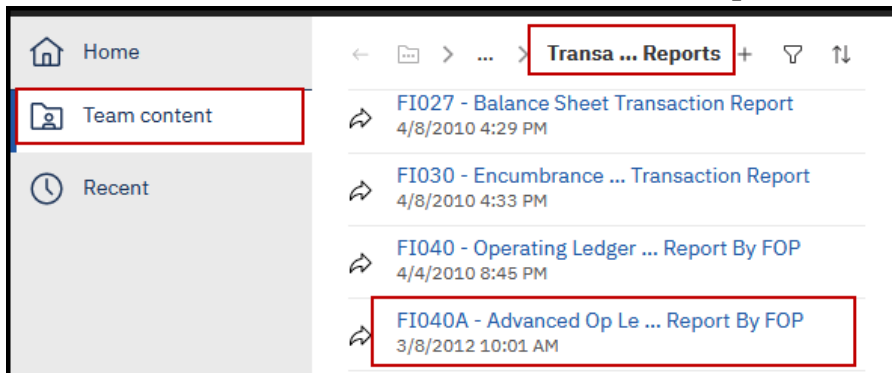
You may select a different report to execute while viewing a report within the report pane:

1. From the left menu, select the Team Content folder 
  - a. Choose a different report from the folder currently being used –or–
  - b. Select either icon in the upper right application bar: 
    - i. Select a different Report Type
    - ii. Select a different Report Category



## Reporting Exercise 2A

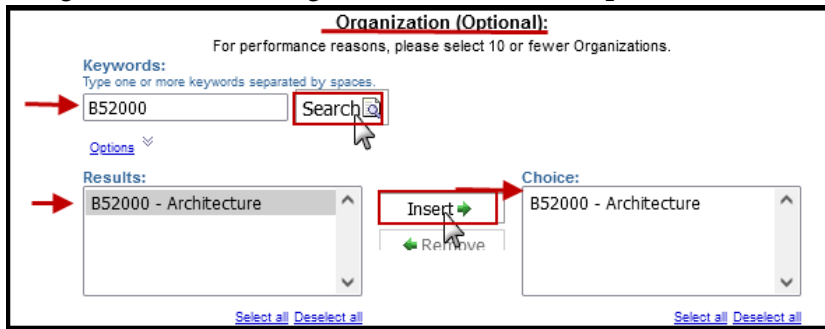
1. From **Team content > TTU Finance > Transaction Report**, select **FI040A -**



2. Enter the **Parameters** as shown below.

Report: FI040A		Texas Tech University Advanced Op Ledger Transaction Repo	
<input type="button" value="Cancel"/> <input type="button" value="Finish"/>			
Field Name:		Parameter:	
Chart of Accounts:	→	* Texas Tech University	▼
Beginning Fiscal Year (YYYY):	→	* 2022	
Ending Fiscal Year (YYYY):	→	* 2022	
Beginning Posting Period (Optional--e.g. 01, 02..):	→	01	
Ending Posting Period (Optional--e.g. 01, 02..):	→	02	

3. Enter Organization Code using **Search & Select Prompt:**



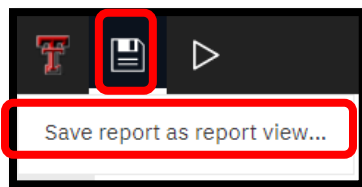
4. Select **Finish** (at top left of the page)



## Exercise 2B: Save as Report View

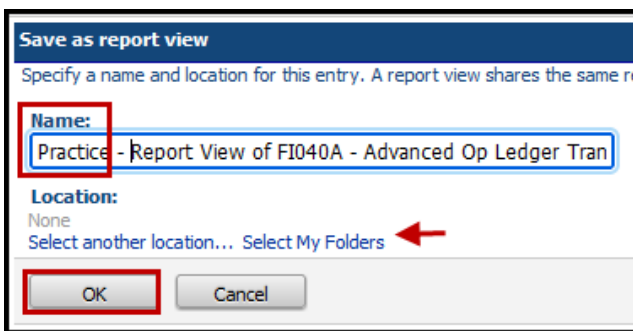
This option lets you save the report output and the parameters used to execute the report.

Select the **floppy 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.

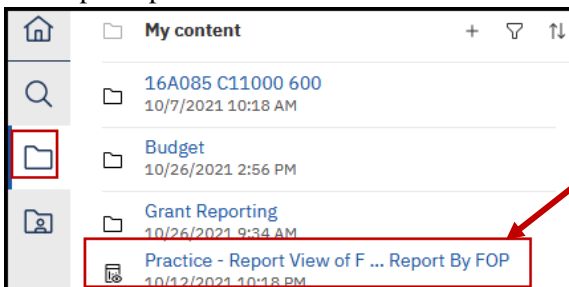
1. You may modify the name to make it recognizable to you. Enter **“Practice”** in front of report name.
2. Within **Location**, select **My Folders** if not prepopulated.
3. Click OK

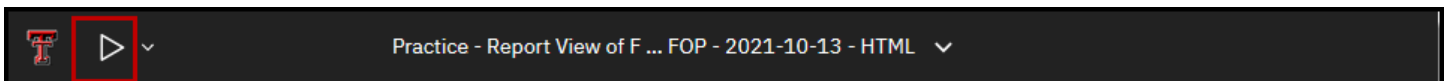


## My Content: Saved Reports

Select **My Content** icon. Then to view the saved version of the report, click on the link for the desired report view.

The report opens with the saved view.





Practice - Report View of F ... FOP - 2021-10-13 - HTML

Report: F1040A

Posting Period	Transaction Description	Transaction Amount	Document Reference Number	Account	Account Description
Actual Expense					
01	2021 MN 10 ORPG 30 F0153424	(178.35)	30ORPG	6B4914	FB ORP Matching
01	2021 MN 10 TRS 30 F0153424	(2,821.04)	30TRS	6B4913	FB TRS Matching
01	2021 MN 10 ORP 30 F0153424	(359.27)	30ORP	6B4914	FB ORP Matching


To execute the report again, click the **Run** button at the top of the toolbar.

- The parameter page populates with your previously saved parameters. Depending on your needs and the data you want to see, you have two options.
  - **Option 1:** Execute using the same parameters. Just click **Finish**.
  - **Option 2:** Change your parameters. Then click **Finish**.

**Modify the parameters as shown below:**

Report: Practi

**Texas Tech University**  
Advanced On Ledger Transaction Re

Cancel Finish 

Field Name:	Parameter:
Chart of Accounts:	* Texas Tech University
Beginning Fiscal Year (YYYY):	* 2021
Ending Fiscal Year (YYYY):	* 2021
Beginning Posting Period (Optional--e.g. 01, 02..):	11
Ending Posting Period (Optional--e.g. 01, 02..):	11



After executing/running a Saved Report, you can:

- Retain saved version by closing the report.
- Overwrite saved version by selecting “Save” .
- If you would like to **Save** a report under a new **Name**, then you will need to execute and save the report from the **Team content** or **Recent** folders (see page 11).

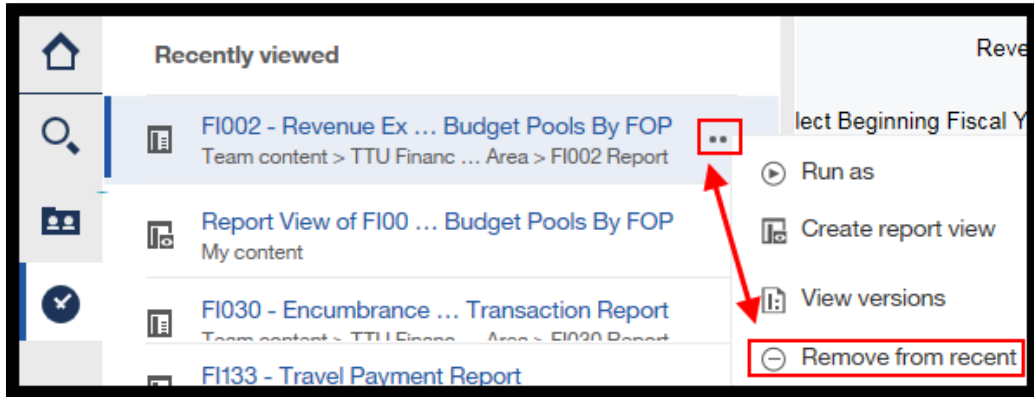
**Recent Folder**



Utilize the **Recent** folder found in the left menu to locate a frequently used report or to execute a report that you have used in the past.

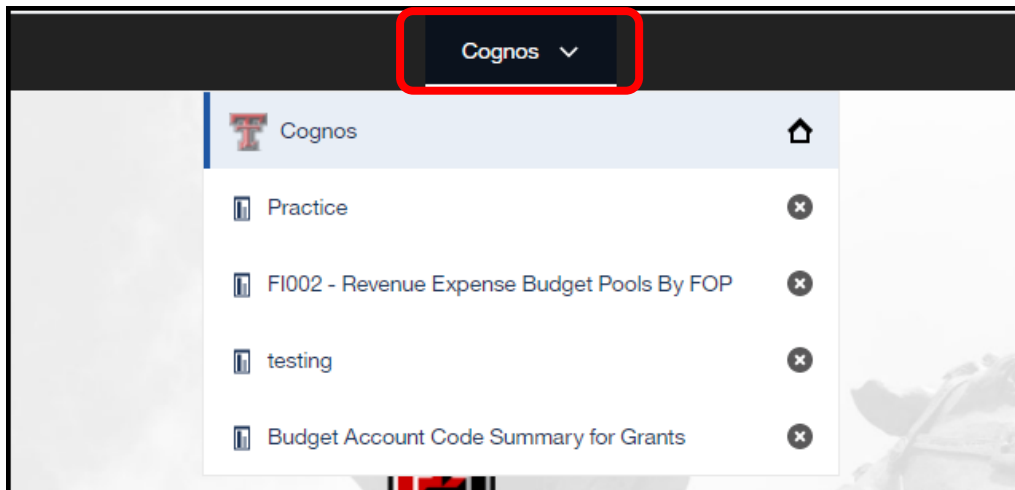
- In your **current log-in** session, after you click on the report, the last data executed will display.
- If you **log out** of Cognos and **log in again**, once you click the report, it will take you to the parameter page.
- If you choose a **Saved** report in **Recent**, you will be linked back to **My Content**.

Reports remain housed here until the user removes them. To remove a report from **Recent**, hover over the report title and select the ellipsis (...) that appears to the right. Then choose **Remove from recent**.



## Application Toolbar

Utilize the drop-down feature located in the center of the Application Toolbar to select a report that you have executed during your current long-in session of Cognos. These reports will not be visible if you log out and log in again.

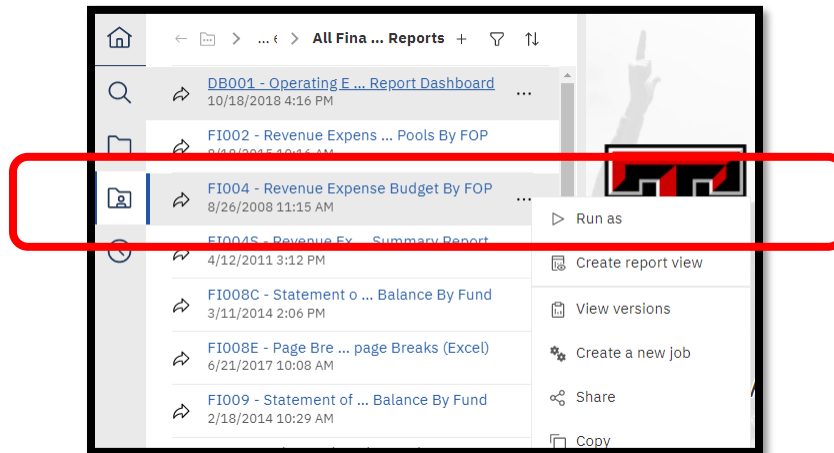


## Scheduling a Report

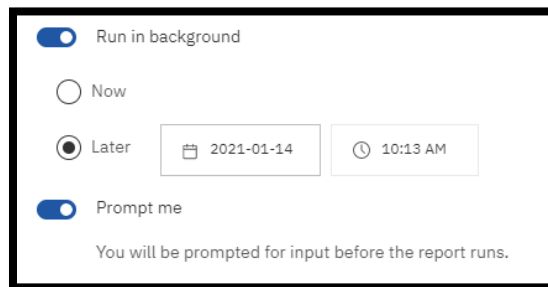
Cognos has a function that allows a report to be scheduled to run later during the current day or at a later date. The report will “**run in the background,**” which means that you will not see it executing, and the report will be delivered to you by **email** or to your “**My Content**” within Cognos,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

### Reporting Exercise 3A: Scheduling a report to be sent by email

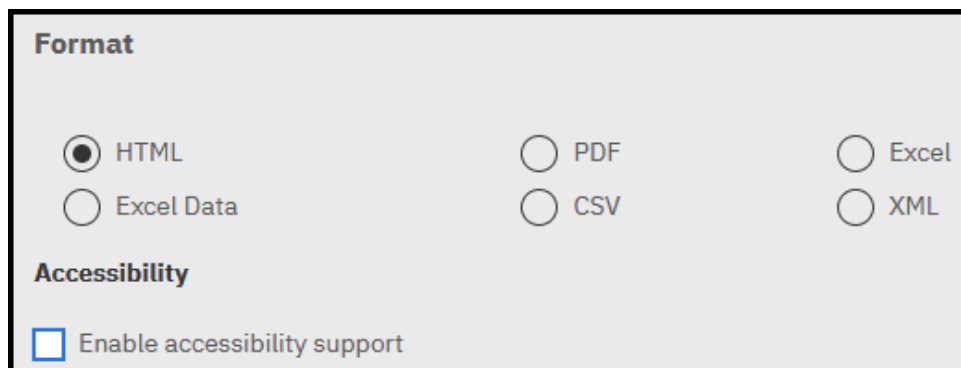
Hover over the report you would like to schedule, and click on the ellipses (...) that will appear on the right. Then click **RUN as**. For example: *Team Content > TTU Finance > All Finance Reports > FI004*



1. Run the report in the background, and set the time you would like to schedule your report.



2. Select the format(s) you would like your report to be produced in.

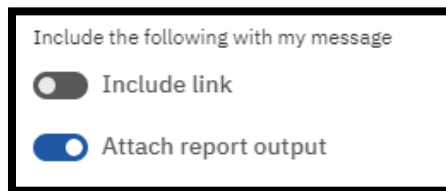



3. Choose the Delivery Method.

If you would like to **send the report by email**, click **Edit Details** to choose the recipient(s).



4. Make sure to **Attach report output**.



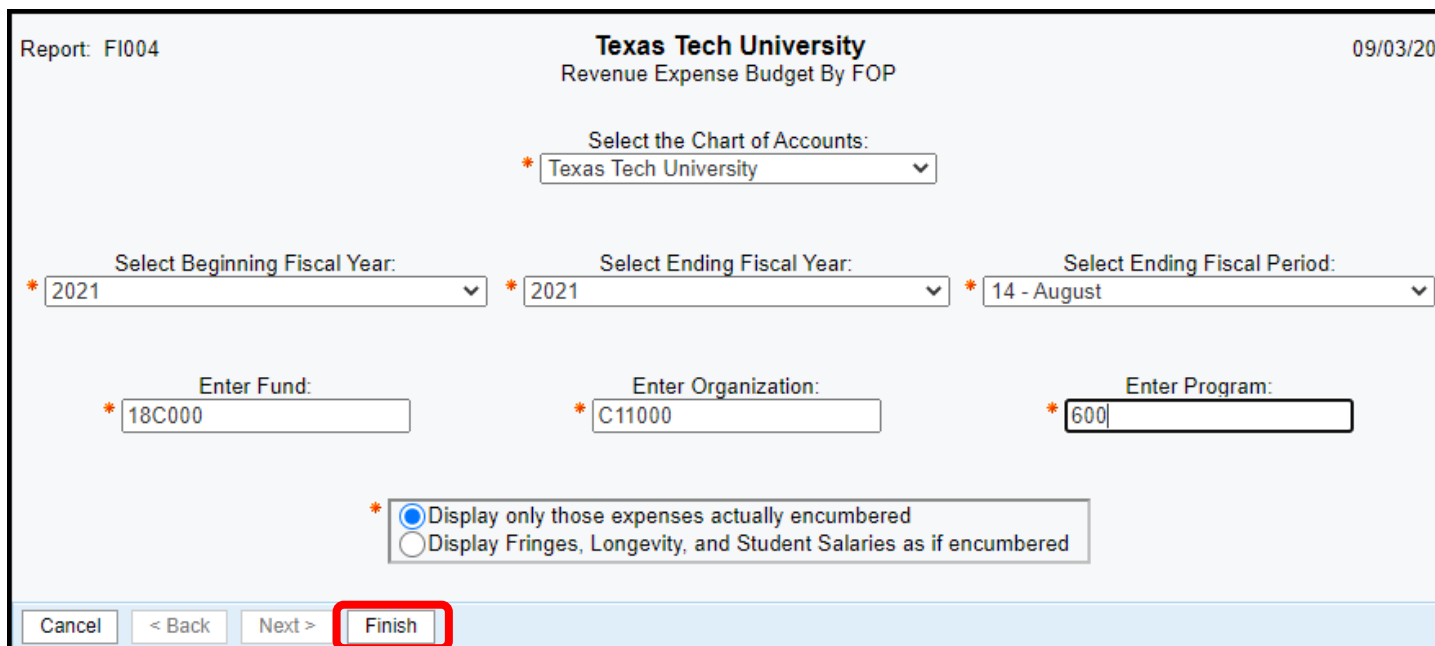
5. When everything is set as desired, click .

**\*\*Note:** Make sure your pop-off blockers are turned off.

#### The Parameter page displays:

6. Complete the parameter page and **Finish**.

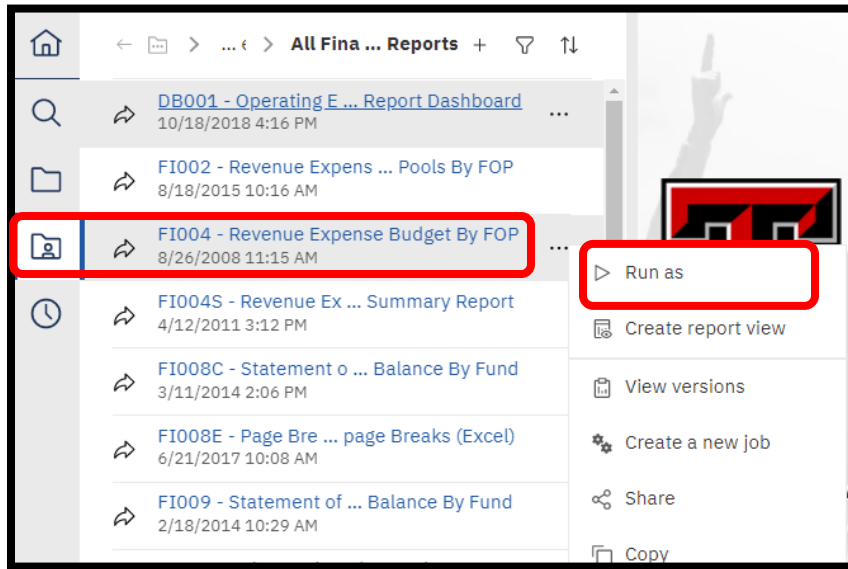
Once the spinning circle in the middle of your screen has disappeared, your report is now scheduled and will execute based on the day and time selected.



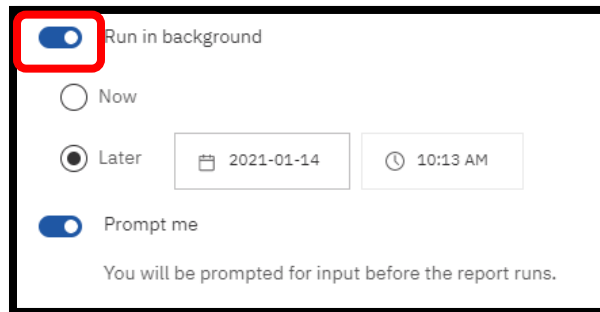


### **Reporting Exercise 3B: Scheduling a Report to be saved in My Content.**

1. Hover over the report you would like to schedule, and click on the ellipses (...) that appear on the right. Then click **RUN as**. For example: *Team Content > TTU Finance > Budget Reports > FI004*



2. Run the report in the background, and set the date and time you would like to schedule your report.

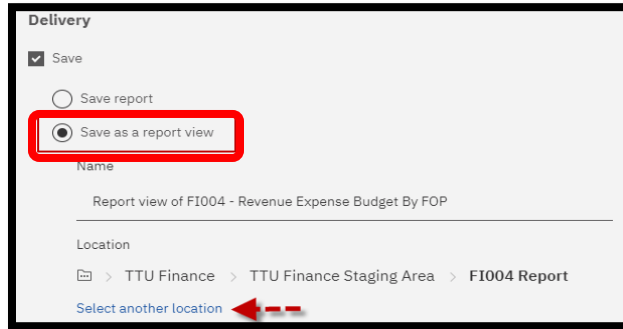


3. Select the format you would like your report to be produced in.

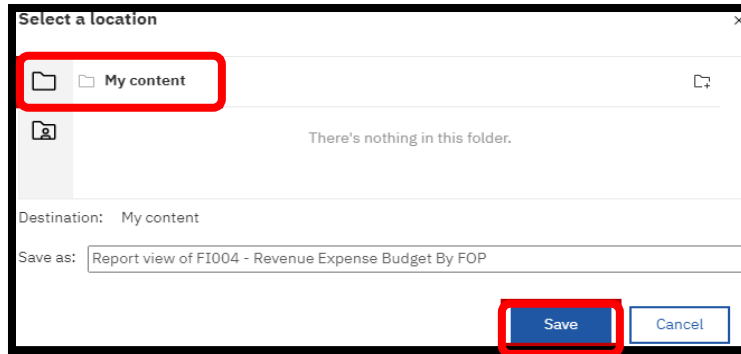



4. To **save your report in My Content**, select **Save as a report view**.  
You can keep the report name as already presented or change it to fit your own needs.

5. Then **Select another Location**

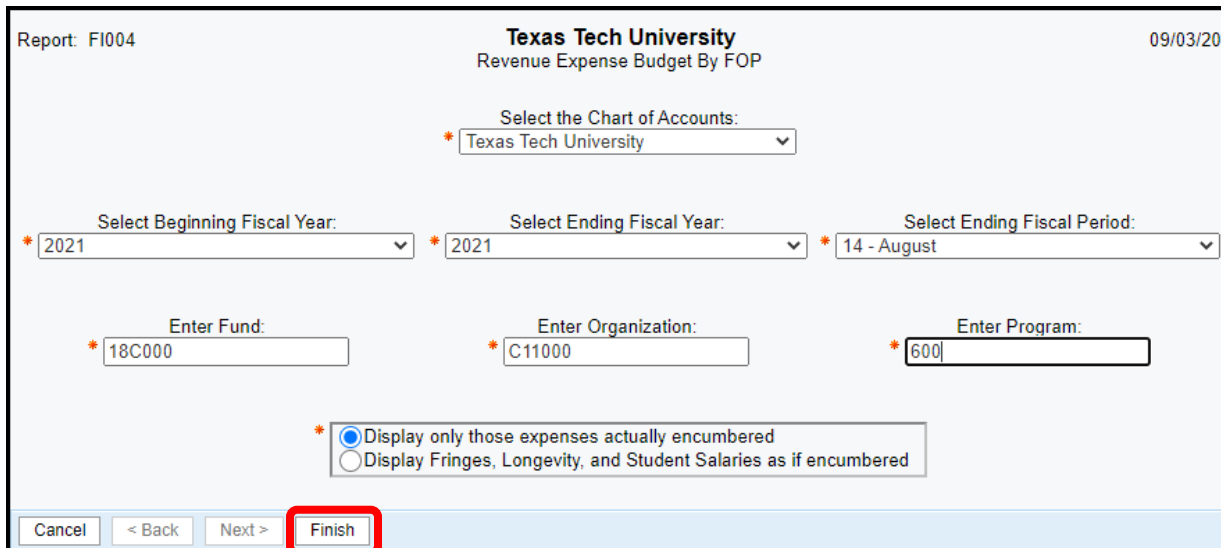


6. Select the **My content** folder, then **Save**.



7. When options are set, click .

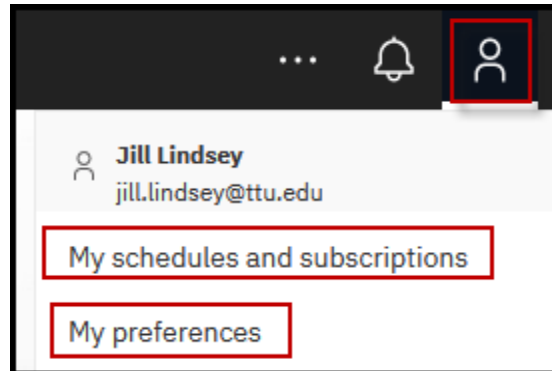
8. Complete the parameter page and **Finish**.  
Once the spinning circle in the middle of your screen has disappeared, your report is now scheduled will execute based on the date and time entered.



## Personal Menu

On the upper right-hand side of the toolbar is an active link attached to the username. Click on the person icon to activate the drop-down. Notice these options:

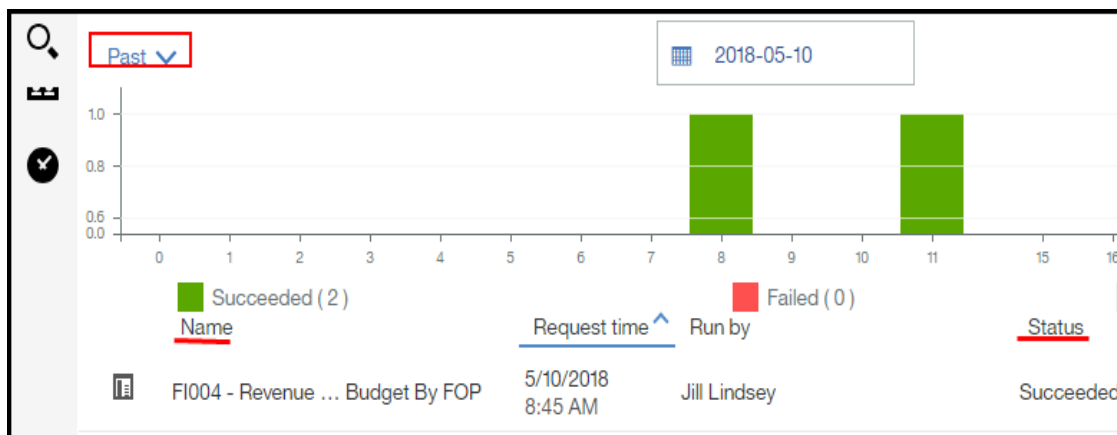
- **My Schedules and Subscriptions** – used to view and manage reports that you have scheduled
- **My Preferences** - used to set the default format for your reports. HTML is preferred.



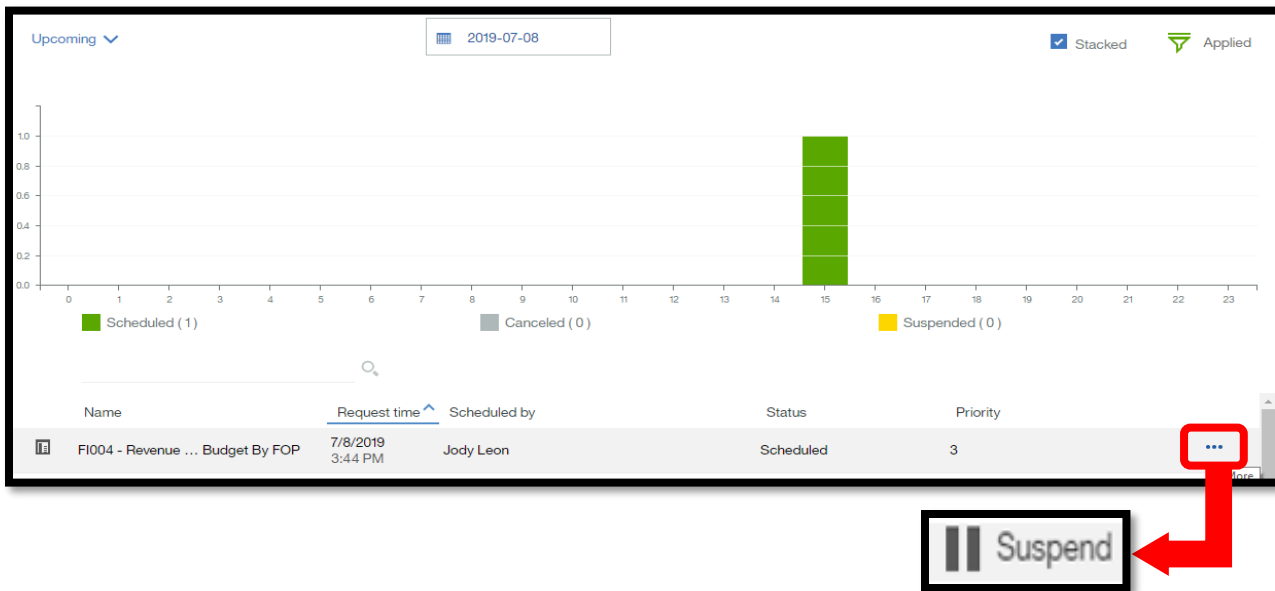
## **My Schedules and Subscriptions**

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

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



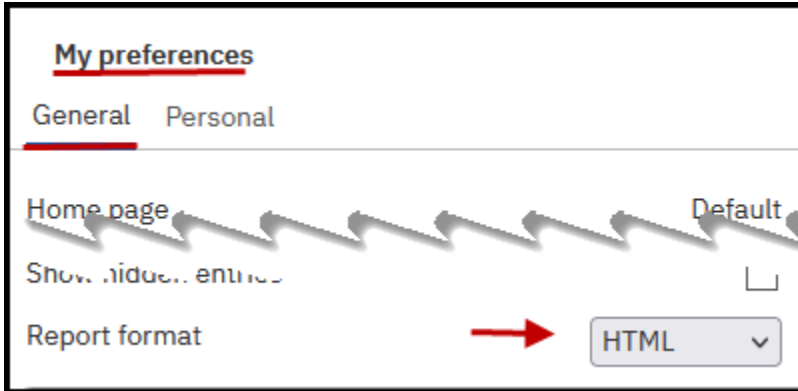
To cancel your upcoming scheduled report, click the ellipsis to the left of the report name, then “Suspend.”



## My Preferences

Select the desired default format for report output:

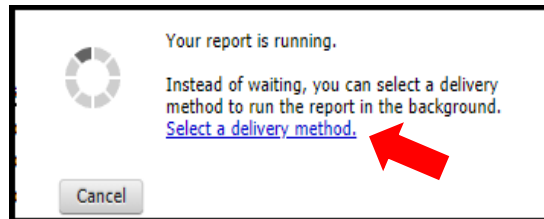
- HTML is preferred, but you may select another format.



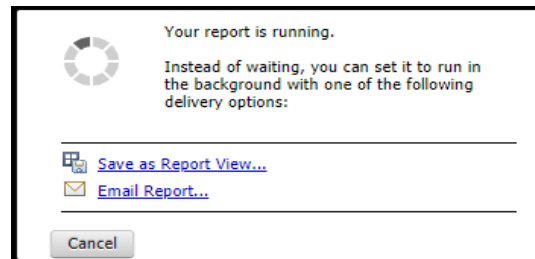
## Other Options within Cognos:

### Selecting a Delivery Method

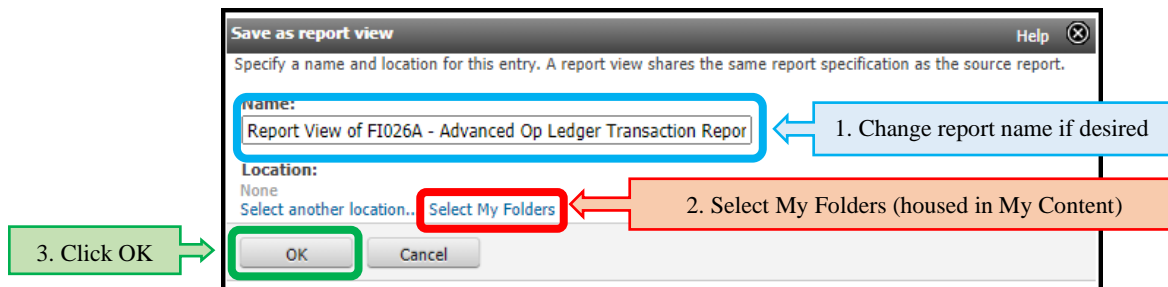
Once the report starts executing, you are provided the option to “Select a Delivery Method”  
If you would like to choose this option, **Select a delivery method.**



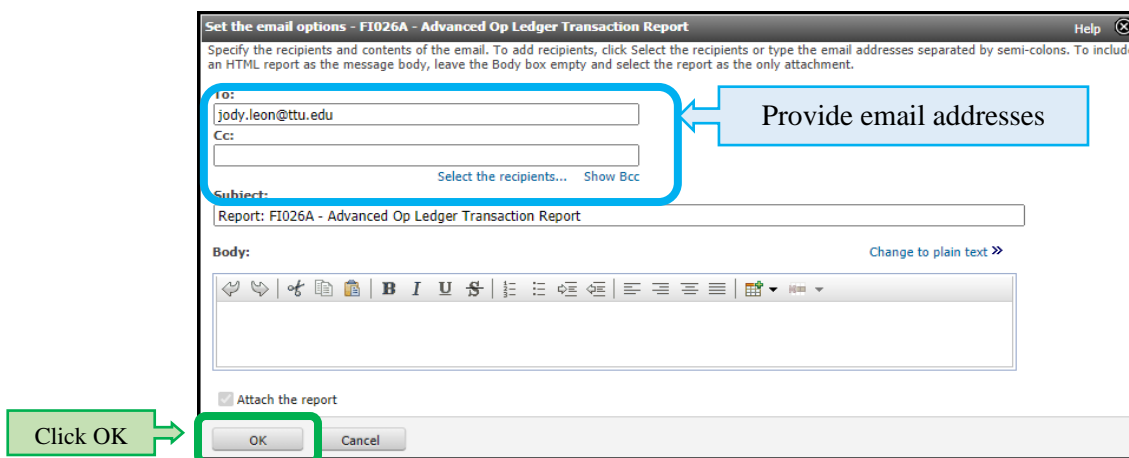
You will then be presented with a choice to either **Save as Report View** (to be placed in My Content) or **Email the Report** to yourself or others.



To **Save as Report View**, follow the steps shown on the following page and refer to report exercises 3A and 3B.



To **Email Report**, type in the necessary **email** addresses, and then select **OK**



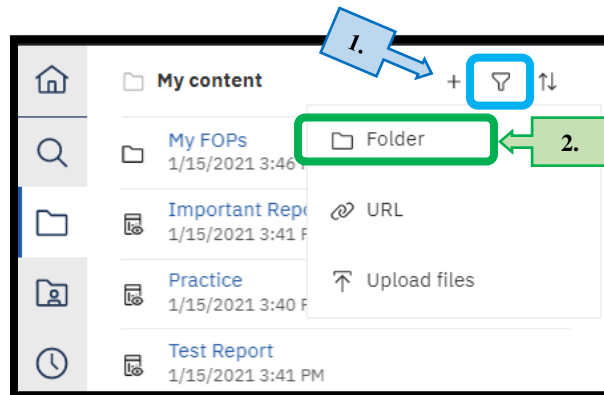
**Note:** After clicking **OK**, once the spinning circle disappears, the report is now running in the background, and you can exit Cognos / your browser / computer system.

## Utilizing “My Content”

### Creating Folders

To organize your saved reports, you can create your folder structure within My Content.

1. Select **New**
2. Select **Folder**



If you hover your mouse over a saved report/folder, an ellipsis (...) will appear. If you click on the ellipsis (...), several options will appear.

A screenshot of the 'My Content' interface showing the context menu for the 'Important Report' folder. A red arrow points to the ellipsis (...) next to the report name. The context menu is open, and several options are highlighted with blue boxes and arrows pointing to explanatory text boxes:

- Run as**: Points to a text box with instructions:
  1. **Run the report again**
    - If you uncheck **Prompt me**, it will run on the previously set parameters
    - If you check **Prompt me**, it will bring up the parameter page.
  2. **Schedule a Saved Report**
    - (see pages 20-21)
- Share**: Points to a text box: "As long as the other person is logged into **Raiderlink**, you can **Share** your reports."
- Copy or move**: Points to a text box: "**Copy or Move** your **Saved reports** in and out of different folders within **My Content**."
- Delete**: Points to a text box: "**Delete** your **Saved Report / Folder**"

The context menu also includes options for 'View versions', 'Create a new job', and 'Properties'.