Caltech

INSTITUTE BUSINESS SYSTEMS | IMSS

COGNOS REPORT STUDIO GUIDE

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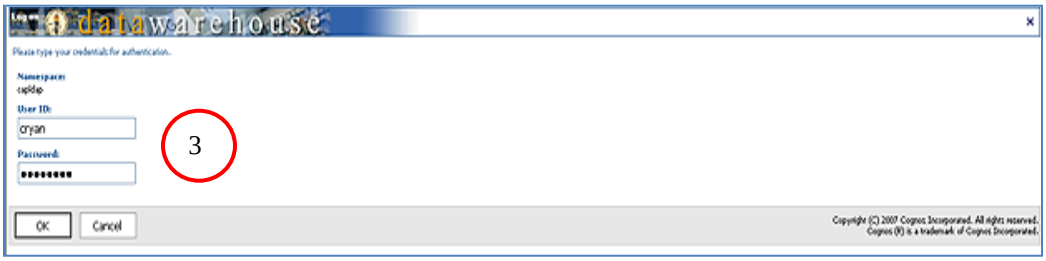
Logging into Cognos

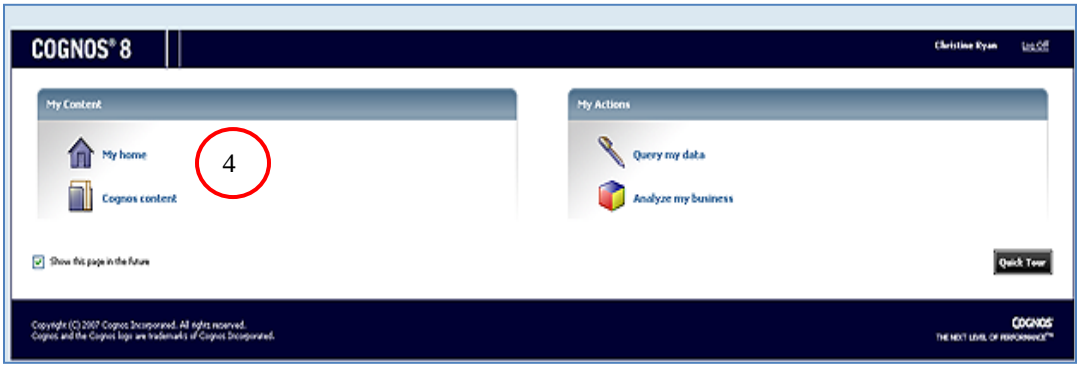
1. Navigate to the **IMSS** page at the following url: www.imss.caltech.edu. Your browser settings must allow cookies for the Caltech link to connect.

NOTE: You can view how current the data is, as well as see if any of the loads are still running, by hovering your cursor over the Caltech Data Warehouse link.

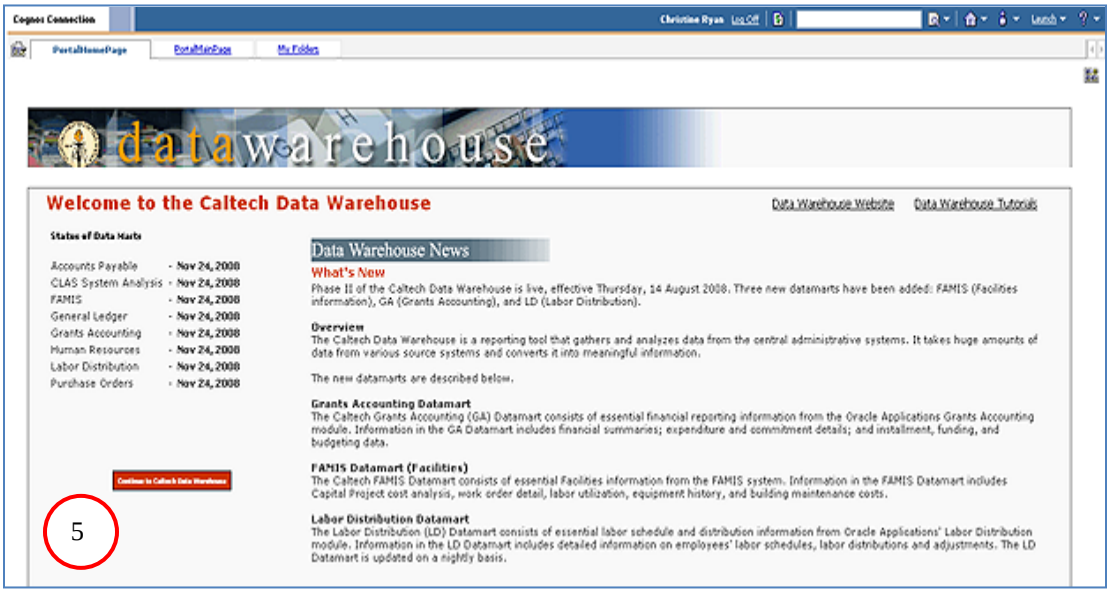
2. Click on the **Caltech Data Warehouse** link.



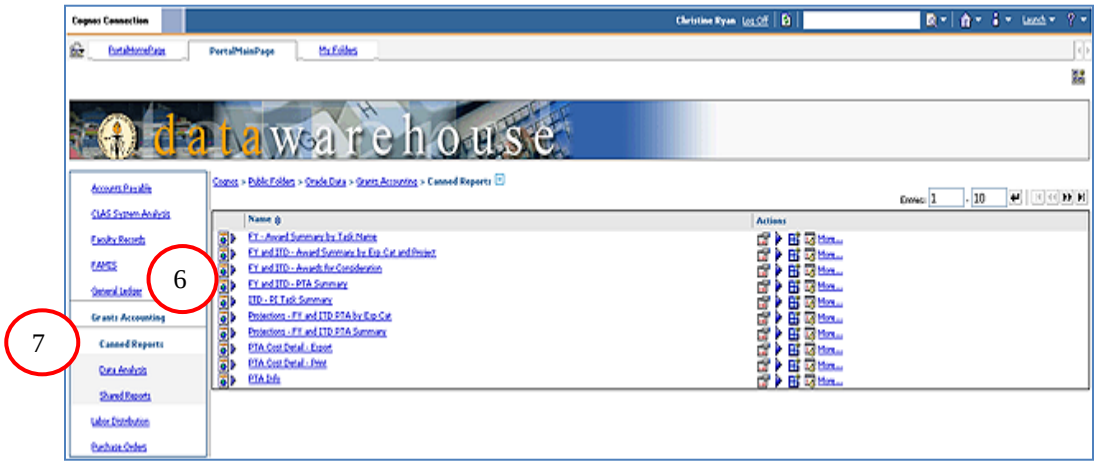
3. Enter your **username and password** (this is the same as your access.caltech/IMSS login credentials) and click the **OK** button.



4. Click on **My Home**.



5. Click on **Continue to Caltech Data Warehouse**.



6. Click on **Grants Accounting**.

7. Click on **Canned Reports**.

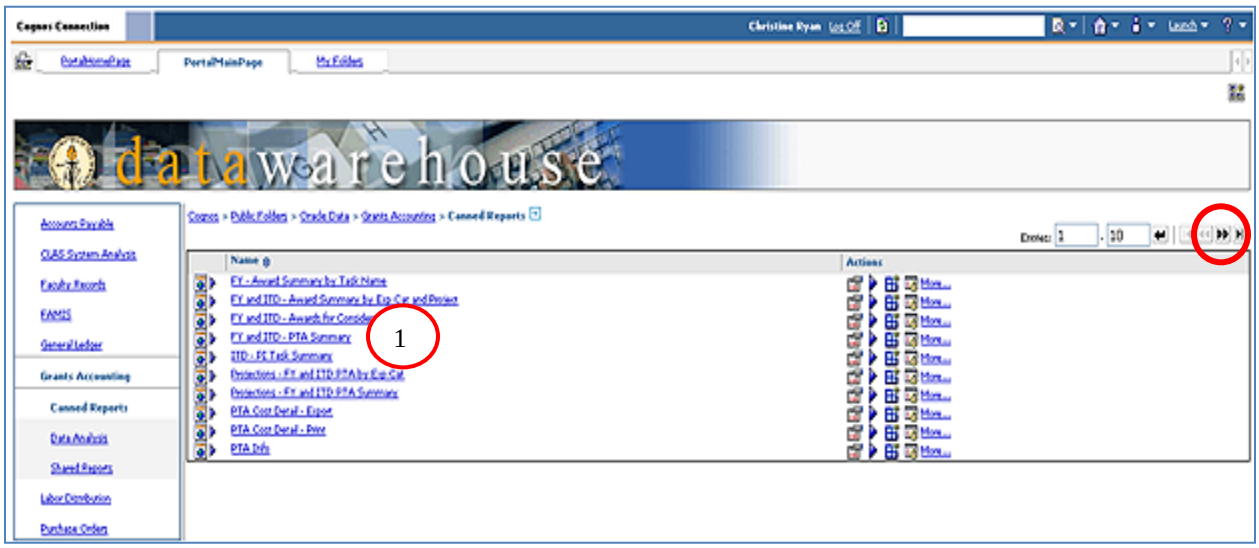
Viewing Summary Information

FY and ITD – PTA Summary Report

This report provides a summary-level view of the status of a PTA. It is used to answer such questions as "How much money do I have left on this account?" or "What is the budget on this account?"

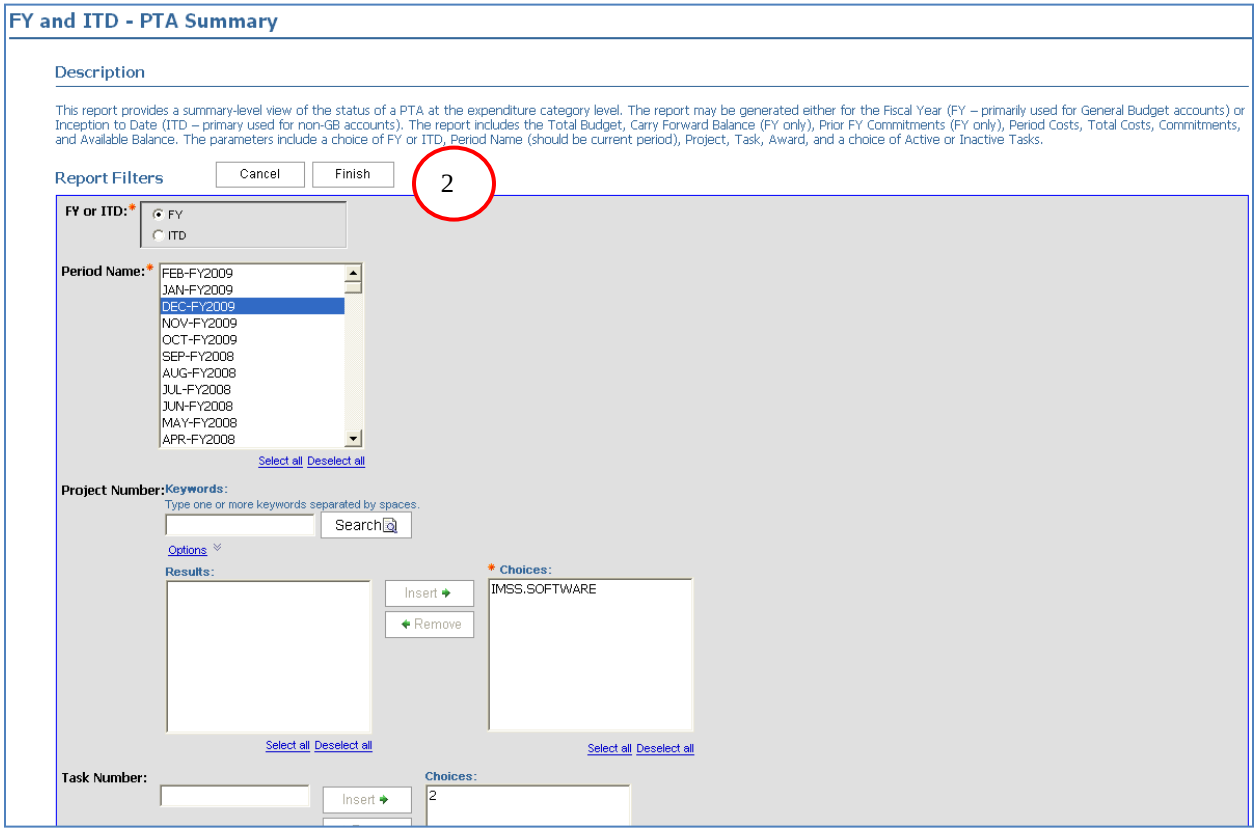
The report includes the Total Budget, Carry Forward Balance, Prior FY Commitments, Period Costs, Total Costs, Commitments, and Available Balance information.

Running a Report



1. Click on the **FY and ITD – PTA Summary** link.

NOTE: Only the first 10 reports are displayed in this section. To view additional reports, click on the double arrow ▶▶ icon.



2. Enter the applicable parameters; then click on the **Finish** button (located at the top and bottom of the page).

- **Period Name**
- **Project Number**
- **Task Number** (task number is case sensitive). **This field is optional.**

> **Note:** Make sure the **FY or ITD** radio button at the top of the page is set to **FY** when viewing **GB** accounts.

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FY - PTA Summary

Period:	Project:	Award:	Task:
DEC-FY2009	IMSS.SOFTWARE	All	2

PROJECT: IMSS.SOFTWARE
Project Name: IMSS SOFTWARE LICENSING
Project from: 15-Sep-2006 to: 30-Sep-2009
TASK: 2 - SOFTWARE LICENSE RU
AWARD: GB.IMSS
Award Name: IMSS DIV GB FUNDS
Award from: 01-Apr-2002 to: 30-Sep-2009

PERIOD: DEC-FY2009
For Month Ending: 31-Dec-2008
AGENCY AWARD#: 9900010

Expenditure Category	Total FY Budget	Prior FY Commitments	Carry Forward Bala	Period Costs	FY Costs	Commitments	FY Budget Balance
Credit Expenditures	-80,000.00	0.00		-8,970.00	-40,988.84	0.00	-39,011.16
Materials and Supplies	310,000.00	0.00	0.00	30,314.66	94,316.53	12,659.84	203,023.63
	230,000.00	**0.00**	**0.00**	**21,344.66**	**53,327.69**	**12,659.84**	**164,012.47**
Total for Task: 2	**230,000.00**	**0.00**	**0.00**	**21,344.66**	**53,327.69**	**12,659.84**	**164,012.47**

1

Viewing Period Costs and Commitments from this report

1. Click on the dollar amount **hyperlink** in the **Period Costs** column.

The Expenditure Details window will open.

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PTA Cost Detail

Period Name:	Project Number:	Task Number:	Award Number:	Expenditure Type:
DEC-FY2009	IMSS.SOFTWARE	2	GB.IMSS	All

Period Name	Project	Task	Award	Exp Item Date	Expenditure Category	Expenditure Type	Cost Comment	Supplier Or Employee	PCard Vendor	Traveler Name	Traveler Destination	Doc Number	Famis WO
DEC-FY2009	IMSS.SOFTWARE	2.3	GB.IMSS	22-Nov-2008	Credit Expenditures	Credit Expenditures	Office of the CIO|Adobe Design Premium CS4 Windows|Ref: WIC-54115|Req: Dungan, Scott Allen|Qty: 1|PTA:GPS.01300.1.16.GB.000130						
DEC-FY2009	IMSS.SOFTWARE	2.3	GB.IMSS	25-Nov-2008	Credit Expenditures	Credit Expenditures	Office of the CIO|Adobe Photoshop CS4 Extended Windows|Ref: WIC-54115|Req: Berry, Max W|Qty: 1|PTA:TMT.PMGMT.1.1.AGENCYEX.TMT						
DEC-FY2009	IMSS.SOFTWARE	2.3	GB.IMSS	26-Nov-2008	Credit Expenditures	Credit Expenditures	Office of the CIO|Adobe Captivate 3.0 Windows|Ref: WIC-54115|Req: Dollar, Susan D|Qty: 1|PTA:IMSS.BSA.1.4.1.GB.IMSS						
DEC-FY2009	IMSS.SOFTWARE	2.3	GB.IMSS	26-Nov-2008	Credit Expenditures	Credit Expenditures	Office of the CIO|Adobe Captivate 3.0 Windows|Ref: WIC-54115|Req: Lindsay, Erin B|Qty: 1|PTA:IMSS.BSA.1.4.1.GB.IMSS						
DEC-FY2009	IMSS.SOFTWARE	2.3	GB.IMSS	26-Nov-2008	Credit Expenditures	Credit Expenditures	Office of the CIO|Adobe Photoshop CS4 Extended Mac|Ref: WIC-54115|Req: Boeke, Joseph|Qty: 1|PTA:INRL.03120.15.1.GB.000310						
DEC-FY2009	IMSS.SOFTWARE	2.3	GB.IMSS	01-Dec-2008	Credit Expenditures	Credit Expenditures	Office of the CIO|Adobe Illustrator CS4 Mac|Ref: WIC-54115|Req: Hester, Janice Ann|Qty: 1|PTA:DCM.00032.1.YONSEI.00012						
DEC-FY2009	IMSS.SOFTWARE	2.3	GB.IMSS	01-Dec-2008	Credit Expenditures	Credit Expenditures	Office of the CIO|Tecplot 360 Windows|Ref: WIC-54115|Req: Hamel, Amandine|Qty: 1|PTA:JOD.POWEL.1.GIFT.161700						
DEC-FY2009	IMSS.SOFTWARE	2.3	GB.IMSS	02-Dec-2008	Credit Expenditures	Credit Expenditures	Office of the CIO|Adobe Illustrator CS4 Windows|Ref: WIC-54115|Req: Bilgin, Ersen (Ersen)|Qty: 1|PTA:DGH1.00075.1.DOE.000035						
DEC-FY2009	IMSS.SOFTWARE	2.3	GB.IMSS	02-Dec-2008	Credit Expenditures	Credit Expenditures	Office of the CIO|PCTeX 6.0 Windows|Ref: WIC-54115|Req: Broersma, Katheryn Rose (Katie)|Qty: 1|PTA:PSAAP.UQ.1.1.DOE.PSAAP						
DEC-FY2009	IM[illegible]RE	2.3	GB.IMSS	03-Dec-	Credit Expenditures	Credit Expenditures	Office of the CIO|Adobe Dreamweaver CS4 Windows|Ref: WIC-54115|Req: Quintana,						

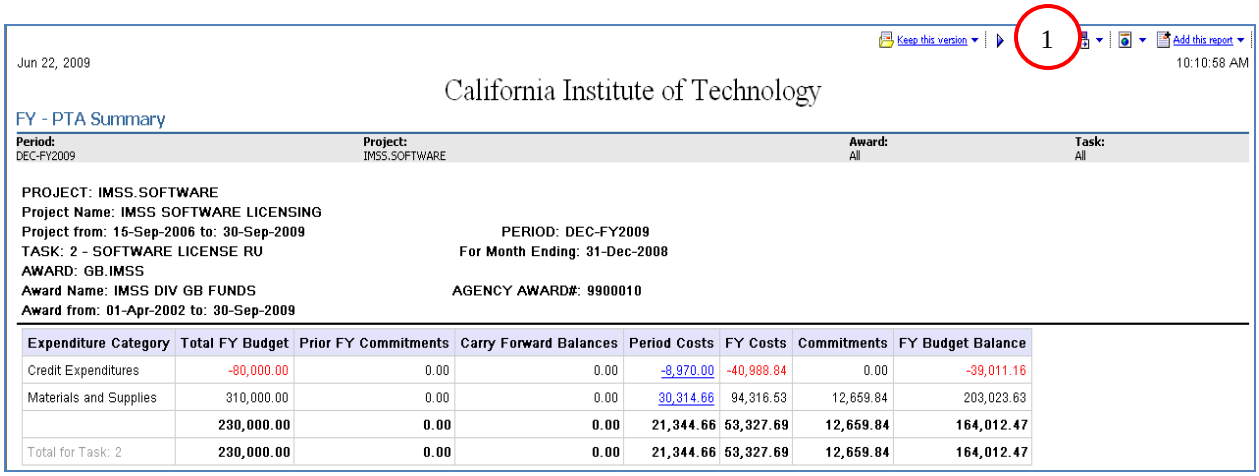
2

Top Page up Page down Bottom

2. Click on the **Page Down** link at the bottom of the page to view next page.

3. Click the **x** in the upper right hand corner of the window to return to the Summary window.

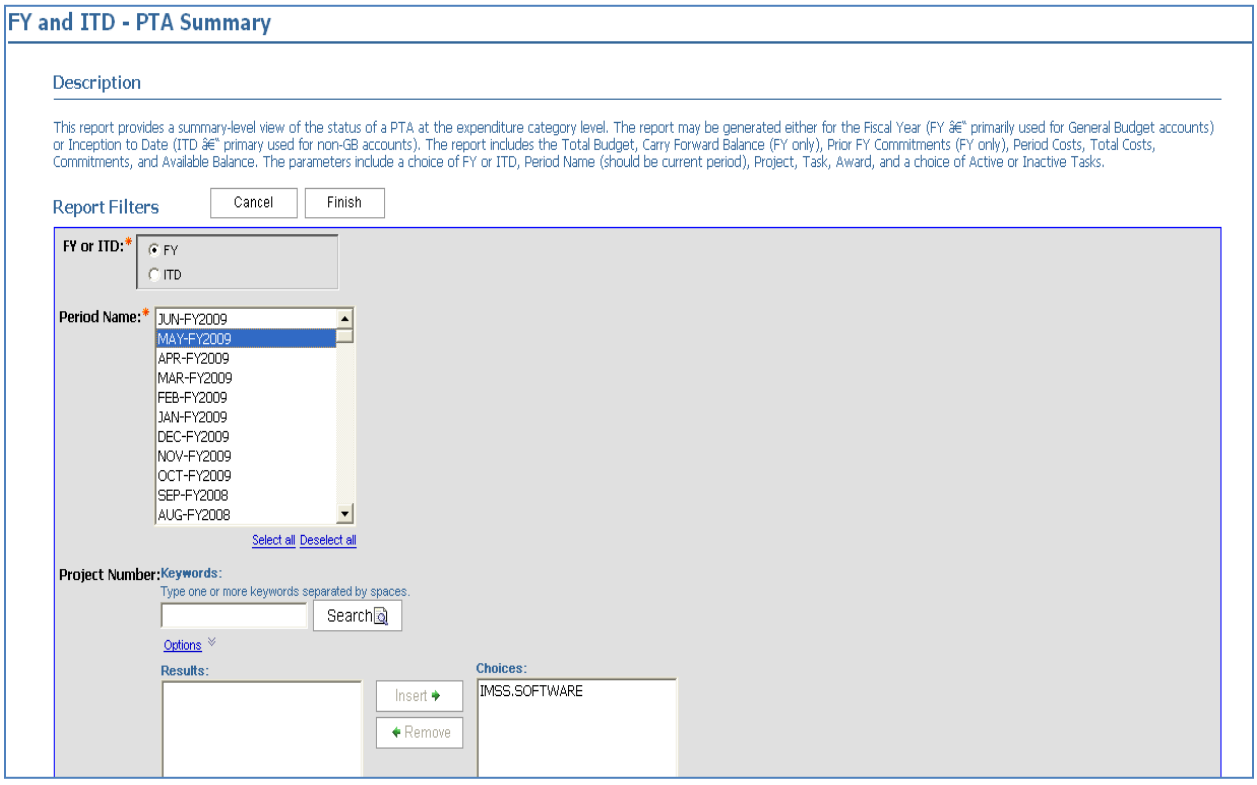
Rerunning a Report



Expenditure Category	Total FY Budget	Prior FY Commitments	Carry Forward Balances	Period Costs	FY Costs	Commitments	FY Budget Balance
Credit Expenditures	-80,000.00	0.00	0.00	-8,970.00	-40,988.84	0.00	-39,011.16
Materials and Supplies	310,000.00	0.00	0.00	30,314.66	94,316.53	12,659.84	203,023.63
	230,000.00	**0.00**	**0.00**	**21,344.66**	**53,327.69**	**12,659.84**	**164,012.47**
Total for Task: 2	**230,000.00**	**0.00**	**0.00**	**21,344.66**	**53,327.69**	**12,659.84**	**164,012.47**

1. Click on the **Run** icon to change parameters (Period, Project, etc).

   The *Report Filters* window will open.



2. Enter new search criteria.

Comparing Summary Information

You can use the same report to compare prior FY data. For example, let's say you would like to know what your Period Costs were for the same period last year for the Exp Cat of Materials and Supplies.

Rerun the above report selecting the Period of SEP-FY2007.

SEP-FY2008

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FY - PTA Summary

Period:	Project:	Award:	Task:
SEP-FY2008, SEP-FY2007	IMSS.SOFTWARE	All	All

PROJECT: IMSS.SOFTWARE
Project Name: IMSS SOFTWARE LICENSING
Project from: 15-Sep-2006 to: 30-Sep-2009 PERIOD: SEP-FY2008
TASK: 2.4 - Licensing Costs For Month Ending: 30-Sep-2008
AWARD: GB.IMSS
Award Name: IMSS DIV GB FUNDS AGENCY AWARD#: 9900010
Award from: 01-Apr-2002 to: 30-Sep-2009

Expenditure Category	Total FY Budget	Prior FY Commitments	Carry Forward Balances	Period Costs	FY Costs	Commitments	FY Budget Balance
Credit Expenditures	0.00	0.00	0.00	5,670.00	3,945.00	0.00	-3,945.00
Materials and Supplies	298,696.40	16,696.40	0.00	3,748.65	347,712.96	0.00	-49,016.56
	298,696.40	**16,696.40**	**0.00**	**9,418.65**	**351,657.96**	**0.00**	**-52,961.56**
Total for Task: 2.4	**298,696.40**	**16,696.40**	**0.00**	**9,418.65**	**351,657.96**	**0.00**	**-52,961.56**

SEP-FY2007

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FY - PTA Summary

Period:	Project:	Award:	Task:
SEP-FY2008, SEP-FY2007	IMSS.SOFTWARE	All	All

PROJECT: IMSS.SOFTWARE
Project Name: IMSS SOFTWARE LICENSING
Project from: 15-Sep-2006 to: 30-Sep-2009 PERIOD: SEP-FY2007
TASK: 2.4 - Licensing Costs For Month Ending: 30-Sep-2007
AWARD: GB.IMSS
Award Name: IMSS DIV GB FUNDS AGENCY AWARD#: 9900010
Award from: 01-Apr-2002 to: 30-Sep-2009

Expenditure Category	Total FY Budget	Prior FY Commitments	Carry Forward Balances	Period Costs	FY Costs	Commitments	FY Budget Balance
Materials and Supplies	290,000.00	0.00	0.00	3,554.26	326,424.66	16,696.40	-53,121.06
	290,000.00	**0.00**	**0.00**	**3,554.26**	**326,424.66**	**16,696.40**	**-53,121.06**
Total for Task: 2.4	**290,000.00**	**0.00**	**0.00**	**3,554.26**	**326,424.66**	**16,696.40**	**-53,121.06**

Comparing the two reports one can note that Period Costs for the account for SEP-FY2007 was $5,670.00 whereas the Period Costs for the same period in FY2008 was $3,554.26

Viewing Detailed Information

There are two reports available for viewing expenditures. These are the *PTA Cost Detail – Export* and the *PTA Cost Detail – Print*. While both reports list Expenditures and Commitments, the formats are very different.

PTA Cost Detail – Export

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PTA Cost Detail

Period Name: SEP-FY2008 **Project Number:** IMSS.SOFTWARE **Task Number:** All **Award Number:** All **Expenditure Type:** Computer Software

Period Name	Project	Task	Award	Exp Item Date	Expenditure Category	Expenditure Type	Cost Comment	Supplier Or Employee	PCard Vendor	Traveler Name	Traveler Destination	Requisition Number	PO Number	Invoice Number	Famis WO	Ex Amo
SEP-FY2008	IMSS.SOFTWARE	2.4	GB.IMSS	10-Sep-2008	Materials and Supplies	Computer Software	Effective May 12, 2005 through Sept. 30, 2005 Vendor shall provide Adobe products requetsed by the ITS Department on behalf of campus users. Contact: Dimitris Sakellariou (626) 395-3208, M/C 312-87. (IO, R50014, 5/20/05).	ZONES INCORPORATED					1076925	B09327380101		1,54
SEP-FY2008	IMSS.SOFTWARE	2.4	GB.IMSS	10-Sep-2008	Materials and Supplies	Computer Software	Los Angeles Sales Tax 8.25% YR 2002	ZONES INCORPORATED					1076925	B09327380101		12
SEP-FY2008	IMSS.SOFTWARE	2.4	GB.IMSS	11-Sep-	Materials and Supplies	Computer Software	Effective May 12,	ZONES INCORPORATED					1076925	B09424900101		1,91

Major Characteristics of the Report

- All information (Project, Award, etc.) is displayed in the body.
- Lists all tasks and sub-tasks in sequential order.
- Does not have sub-totals or grand totals.
- Displays several additional columns such as PCard Vendor, Traveler Name, Traveler Destination, Requisition Number, PO Number, Invoice Number and others. Notice how the PCard Vendor name (which is lumped into the Expenditure Comment column in Discoverer) is displayed in a separate column for ease of identification.
- When exported into Excel, all rows are displayed in the same sheet of the spreadsheet.
- When exported into csv an additional field entitled “Exp Item ID” is available.

PTA Cost Detail – Print

California Institute of Technology

PTA Cost Detail

Period Name:	Project Number:	Task Number:	Award Number:	Expenditure Type:
SEP-FY2008	IMSS.SOFTWARE	All	All	All

PROJECT: IMSS.SOFTWARE
Project Name: IMSS SOFTWARE LICENSING
Proj from: 15-Sep-2006 Proj to: 30-Sep-2009
PERIOD: SEP-FY2008
For Month Ending: 30-SEP-2008
TASK: 2.4 - Licensing Costs
AWARD: GB.IMSS
AGENCY AWARD # 9900010
Award Name: IMSS DIV GB FUNDS
Award from: 01-Apr-2002 Award To: 30-Sep-2009

Expenditure Category	Expenditure Type	Exp Item Date	Supplier Or Employee	Doc Number	Expenditure Comment	Expenditure Amount	Commitments
Credit Expenditures	Credit Expenditures	04-Sep-2008			Office of the CIO|FY2008 ChemDraw/ChemOffice chargebacks at 90%|Ref: WIC-52474|Req: Carroad, Paul A|Qty: 1|PTA:CCE.01100.16.GB.000110	5,670.00	0.00
	Total For Expenditure Type Credit Expenditures					**5,670.00**	**0.00**
Total For Expenditure Category Credit Expenditures						**5,670.00**	**0.00**
Materials and Supplies	Computer Software	10-Sep-2008	ZONES INCORPORATED	B09327380101	Effective May 12, 2005 through Sept. 30, 2005 Vendor shall provide Adobe products requetsed by the ITS Department on behalf of campus users. Contact: Dimitris Sakellariou (626) 395-3208, M/C 312-87. (IO, R50014, 5/20/05).	1,549.04	0.00
		10-Sep-2008	ZONES INCORPORATED		Los Angeles Sales Tax 8.25% YR 2002	127.80	0.00
		11-Sep-2008	ZONES INCORPORATED	B09424900101	Effective May 12, 2005 through Sept. 30, 2005 Vendor shall provide Adobe products requetsed by the ITS Department on behalf of campus users. Contact: Dimitris Sakellariou (626) 395-3208, M/C 312-87. (IO, R50014, 5/20/05).	1,913.91	0.00
		11-Sep-2008	ZONES INCORPORATED		Los Angeles Sales Tax 8.25% YR 2002	157.90	0.00
	Total For Expenditure Type Computer Software					**3,748.65**	**0.00**
Total For Expenditure Category Materials and Supplies						**3,748.65**	**0.00**
Total For Task 2.4						**9,418.65**	**0.00**

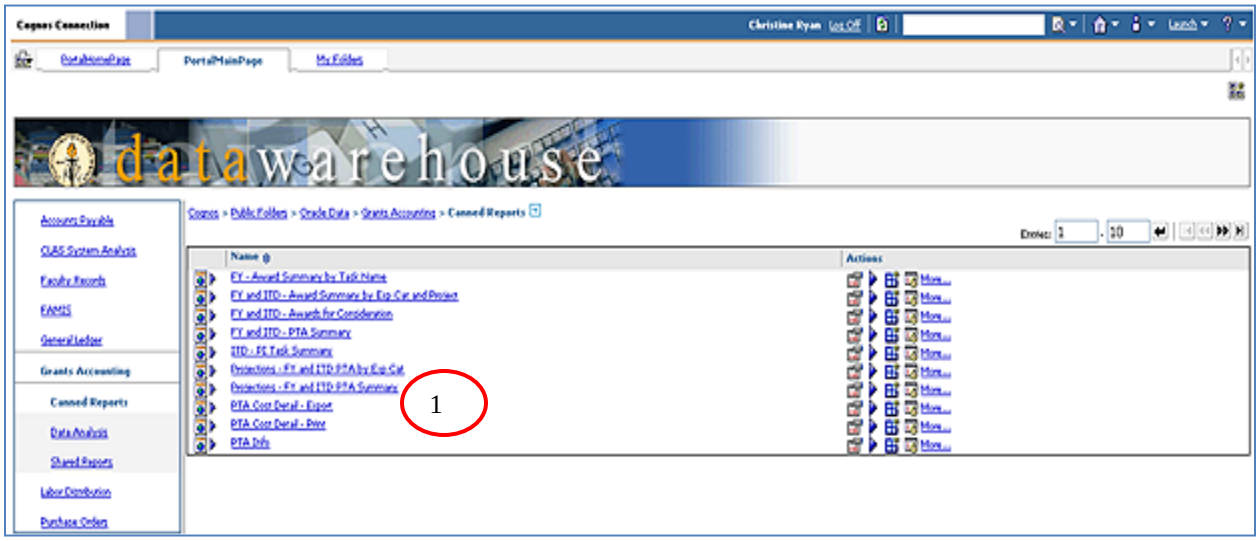
Major Characteristics of the Report

- Not all information is displayed in the body. Much of the information such as (Project, Award, Task number, etc.) is displayed in the Header.
- Lists all tasks and sub-tasks in sequential order but you must Page Down to move between tasks.
- Does have sub-totals or grand totals.
- Does not display the additional columns such as PCard Vendor and Traveler information as it does in the other detail report.
- When exported into Excel, each task and sub-task are exported into separate sheets of the spreadsheet.
- When exported into csv an additional field entitled “Exp Item ID” is available.

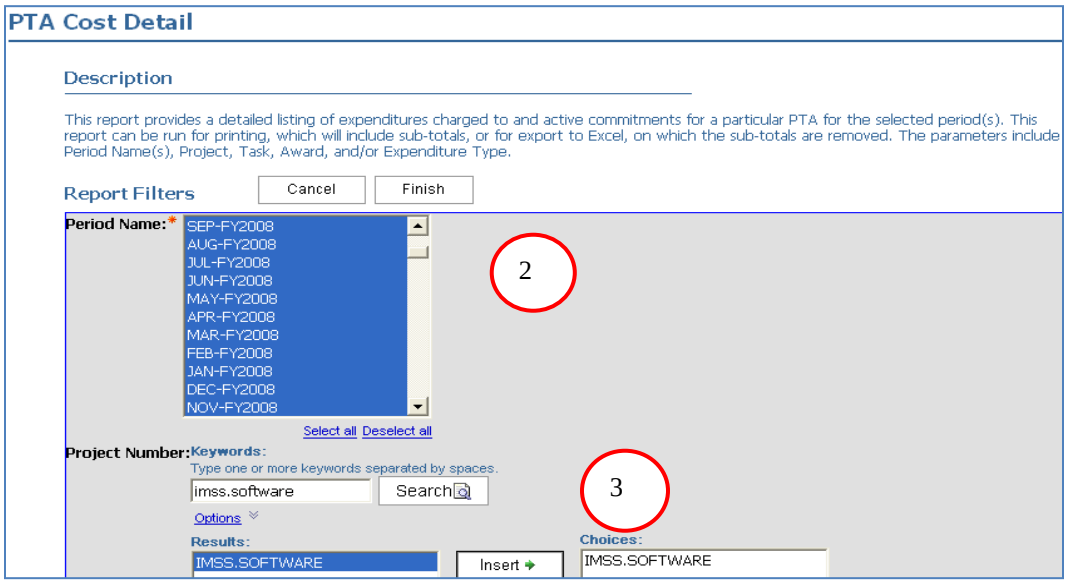
Running a Detail Report

Detailed reports can be run for one or more Projects and one or more Periods. You can also further define your query by specific task or sub-task as well as one or more Expenditure Types.

In the following example, I would like to view all expenditures for computer software for FY2008.

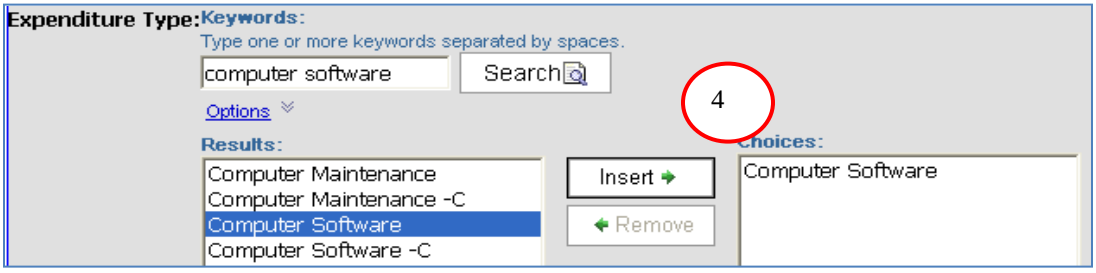


1. Select **PTA Cost Detail – Export**.



2. Select all periods for FY2008.

3. Enter the applicable **Project Number.**



4. Enter the applicable **Expenditure Type** (Computer Software in this example).

5. Click the **Finish** button.

The *PTA Cost Detail* window will appear.

PTA Cost Detail

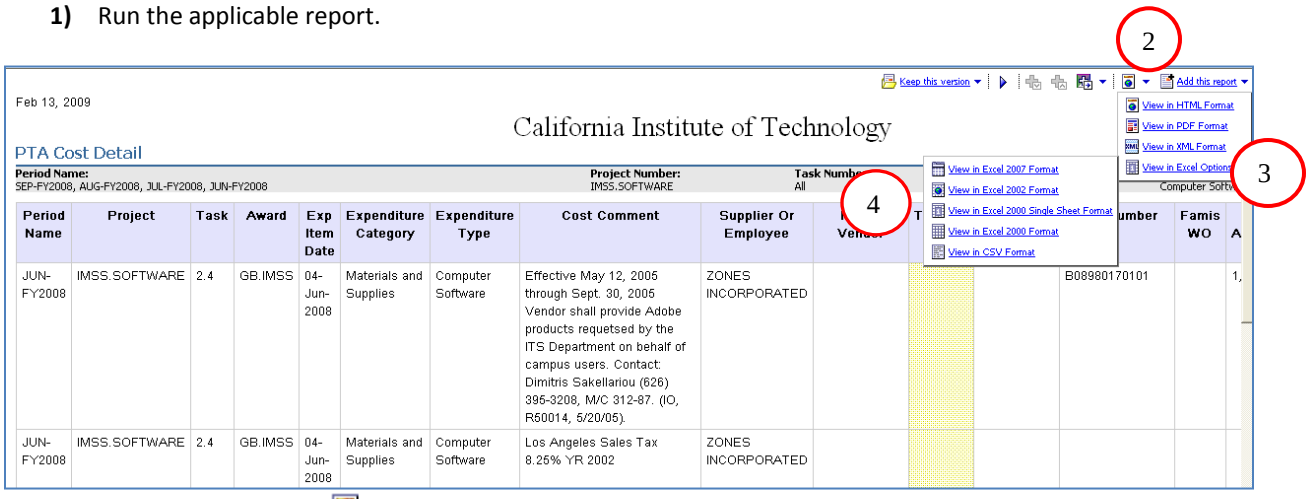
Period Name:	Project Number:	Task Number:	Award Number:	Expenditure Ty
SEP-FY2008, AUG-FY2008, JUL-FY2008, JUN-FY2008	IMSS.SOFTWARE	All	All	Computer Softwe

Period Name	Project	Task	Award	Exp Item Date	Expenditure Category	Expenditure Type	Cost Comment	Supplier Or Employee	PCard Vendor	Traveler Name	Traveler Destination	Doc Number	Famis WO	A
JUN-FY2008	IMSS.SOFTWARE	2.4	GB.IMSS	04-Jun-2008	Materials and Supplies	Computer Software	Effective May 12, 2005 through Sept. 30, 2005 Vendor shall provide Adobe products requetsed by the ITS Department on behalf of campus users. Contact: Dimitris Sakellariou (626) 395-3208, M/C 312-87. (IO, R50014, 5/20/05).	ZONES INCORPORATED				B08980170101		1,
JUN-FY2008	IMSS.SOFTWARE	2.4	GB.IMSS	04-Jun-2008	Materials and Supplies	Computer Software	Los Angeles Sales Tax 8.25% YR 2002	ZONES INCORPORATED						
JUN-FY2008	IMSS.SOFTWARE	2.4	GB.IMSS	10-Jun-2008	Materials and Supplies	Computer Software	Effective 09-Nov-2005 through 30-Sep-2006 Vendor shall provide Microsoft Select products requested by the IMSS Department on behalf of campus. Caltech Administrative Contact: Dimitris Sakellariou, (626) 395-3208, E-Mail: dimitris@caltech.edu	ZONES INCORPORATED				1079276		

Notice that only those records with the Expenditure Type of **Computer Software** are displayed.

Exporting to Excel

1) Run the applicable report.



2) Click on the **View In** drop-down menu.

3) Highlight **View in Excel Options**.

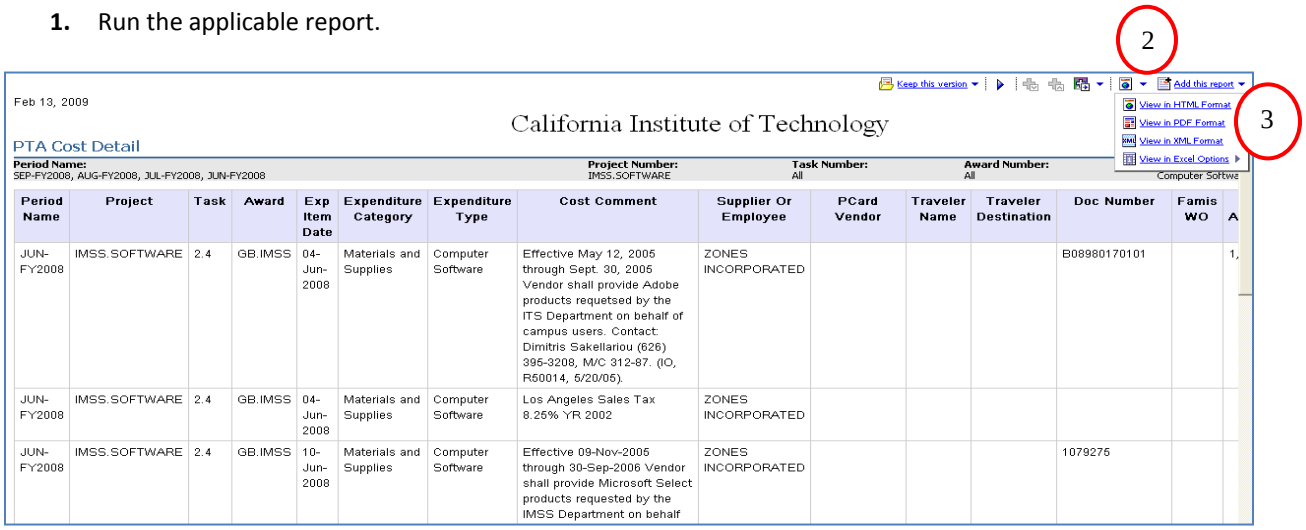
4) Select the applicable Excel option.

NOTE: In order to export to Excel 2007 you must have either Office 2007 or the Microsoft Compatibility pack installed on your PC. This option is not available for MAC users.

Reminder: If you are solely interested in a data dump we recommend exporting to csv by selecting the **View in CSV Format** from the **View in Excel Options** area.

Saving/Printing in PDF Format

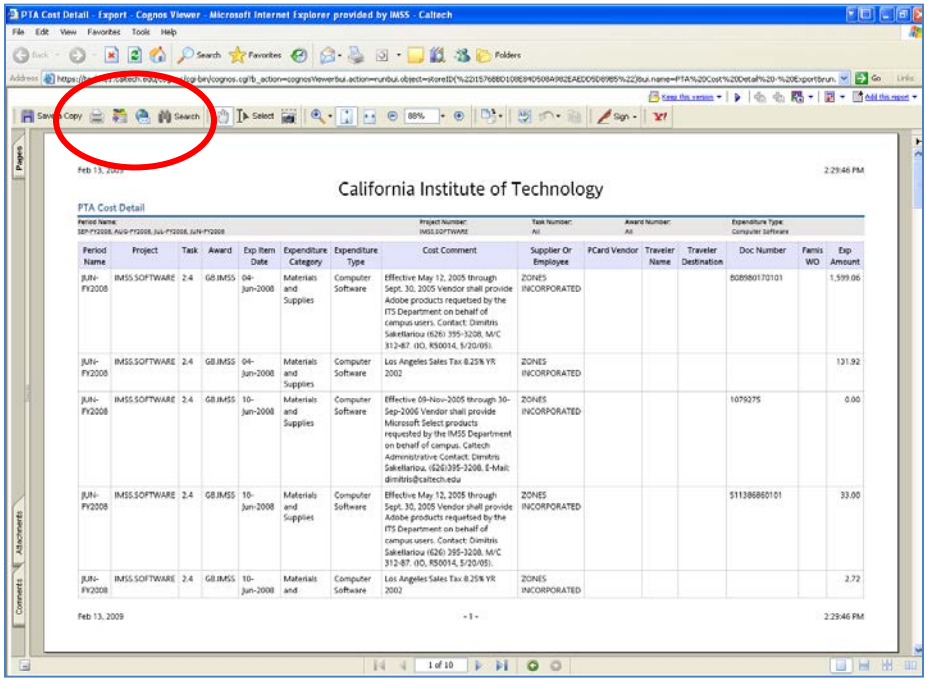
1. Run the applicable report.



Period Name	Project	Task	Award	Exp Item Date	Expenditure Category	Expenditure Type	Cost Comment	Supplier Or Employee	PCard Vendor	Traveler Name	Traveler Destination	Doc Number	Famis WO	A
JUN-FY2008	IMSS.SOFTWARE	2.4	GB.IMSS	04-Jun-2008	Materials and Supplies	Computer Software	Effective May 12, 2005 through Sept. 30, 2005 Vendor shall provide Adobe products requetsed by the ITS Department on behalf of campus users. Contact: Dimitris Sakellariou (626) 395-3208, M/C 312-87. (IO, R50014, 5/20/05).	ZONES INCORPORATED				B08980170101		1,
JUN-FY2008	IMSS.SOFTWARE	2.4	GB.IMSS	04-Jun-2008	Materials and Supplies	Computer Software	Los Angeles Sales Tax 8.25% YR 2002	ZONES INCORPORATED						
JUN-FY2008	IMSS.SOFTWARE	2.4	GB.IMSS	10-Jun-2008	Materials and Supplies	Computer Software	Effective 09-Nov-2005 through 30-Sep-2006 Vendor shall provide Microsoft Select products requested by the IMSS Department on behalf	ZONES INCORPORATED				1079275		

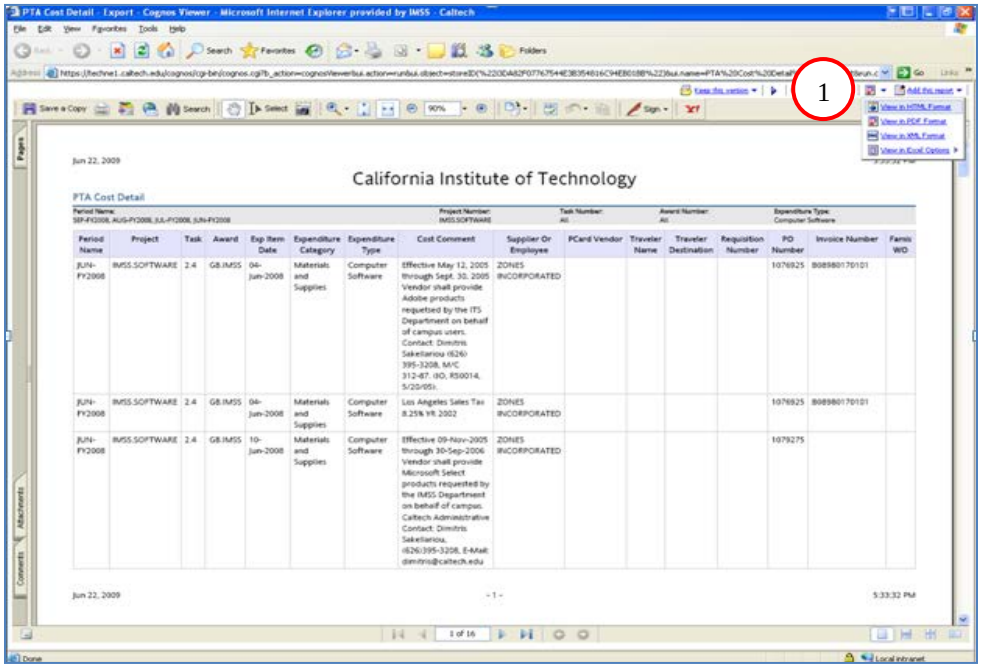
2. Click on the **View In** drop-down menu.

3. Select **View in PDF Format**.



NOTE: In order to **Save** or **Print** the PDF report you must use the icons within the report and not from the browser menu.

Converting Report from PDF to HTML format



Click on the **View In**  drop -down menu and select **View in HTML Format**.

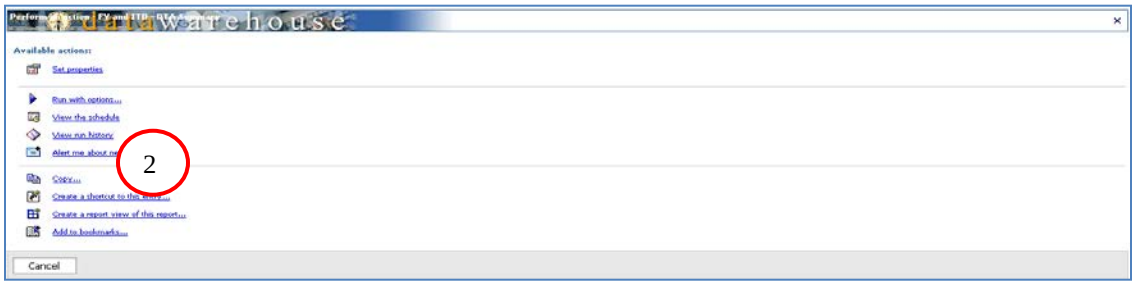
Saving Report Parameters

Cognos has the capability of saving canned report parameters which is ideal for people that frequently run reports for the same accounts. Saving report parameters is a two step process; first you must copy the applicable canned report into the **My Folders** area within Cognos and then you can set your parameters. You can only personalize reports that have been copied into to the **My Folders** area.

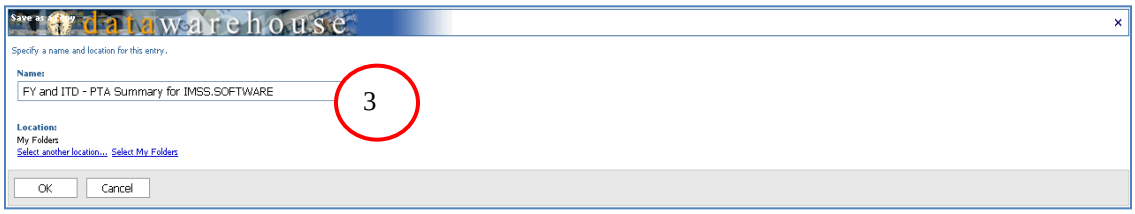
Copying Canned Reports

1. Select the **More...** link in the *Actions* column to the right of the applicable report.

   The *Perform an Action* window will open.

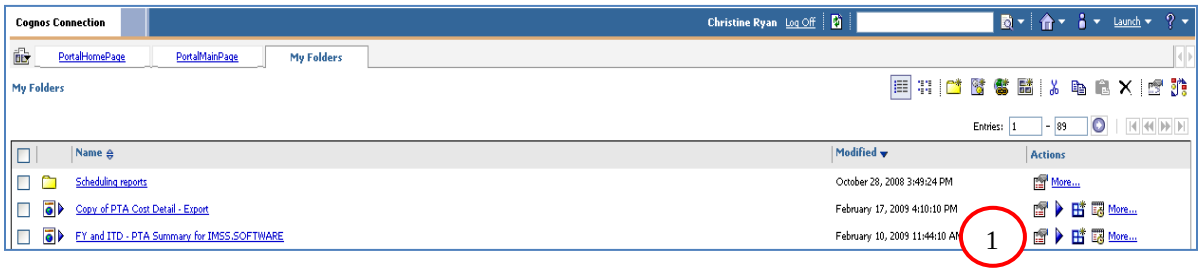


2. Click on the **Copy...** link.



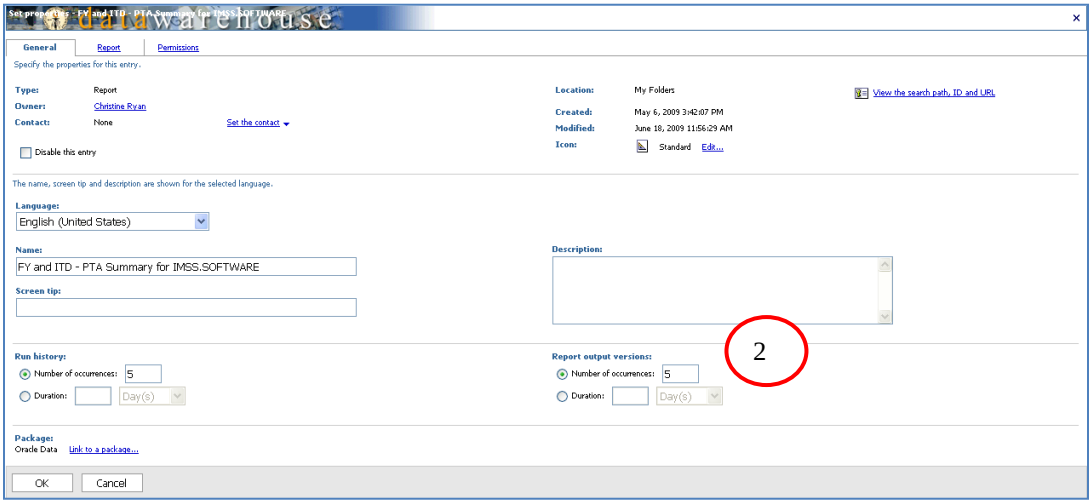
3. Enter the applicable name in the **Name** field and click on the **OK** button. This information will appear in the email Subject line for Scheduled reports that are sent as links.

Setting Report Parameters



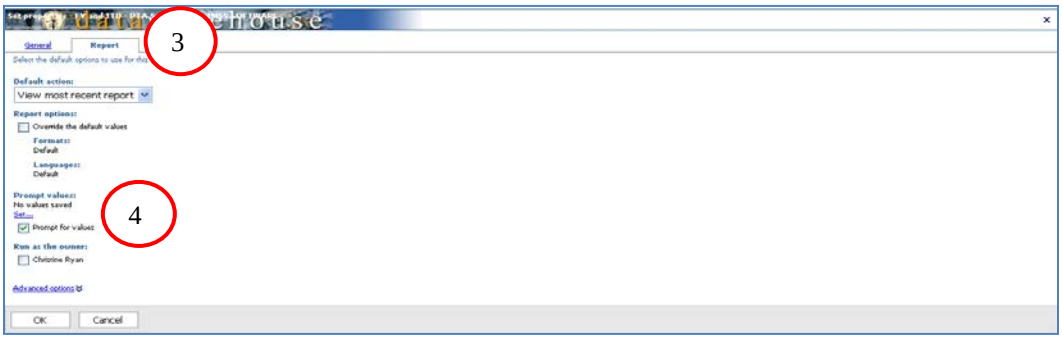
1. Click on the **Set Properties** icon.

   The *Set Properties* window will open

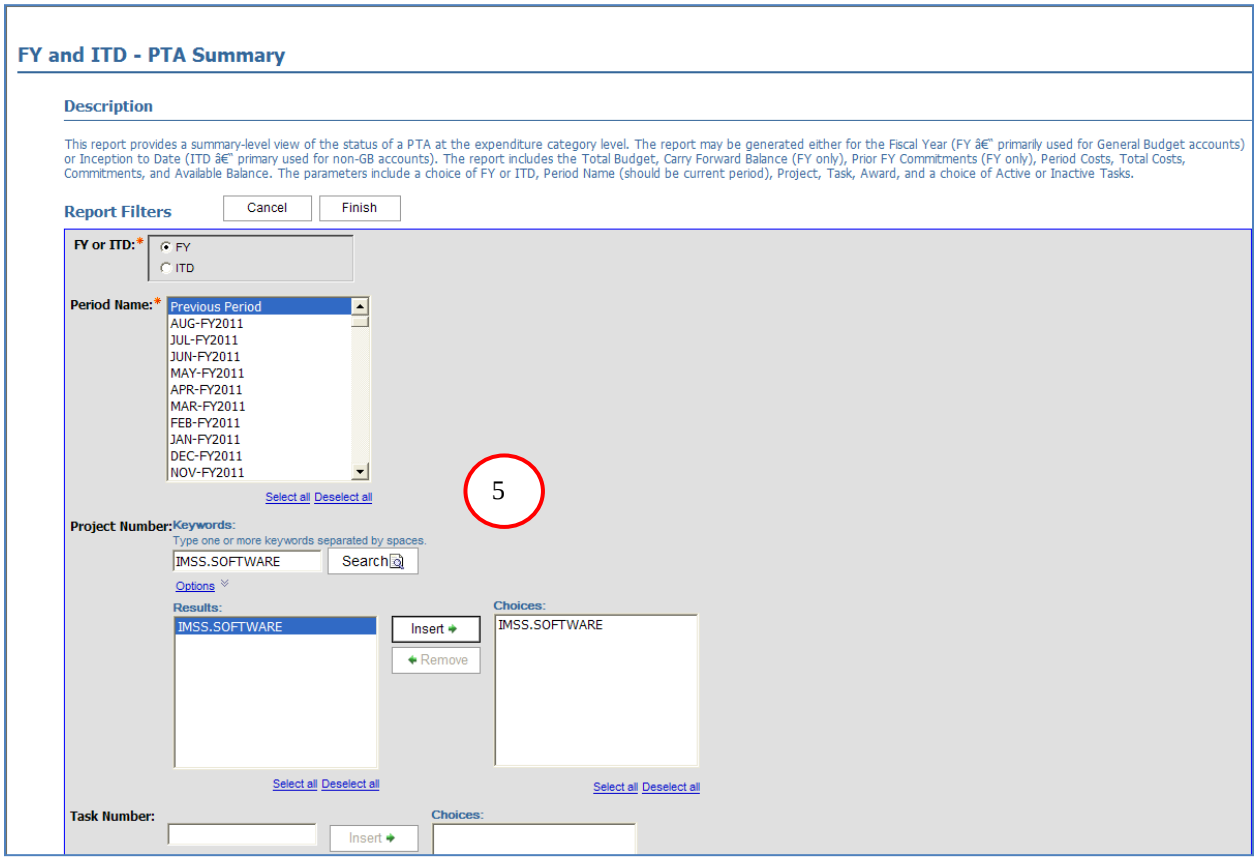


2. Enter **5** in the **Number of Occurrences** field within the *Report output versions:* section if you will be scheduling reports. **See page 25.**

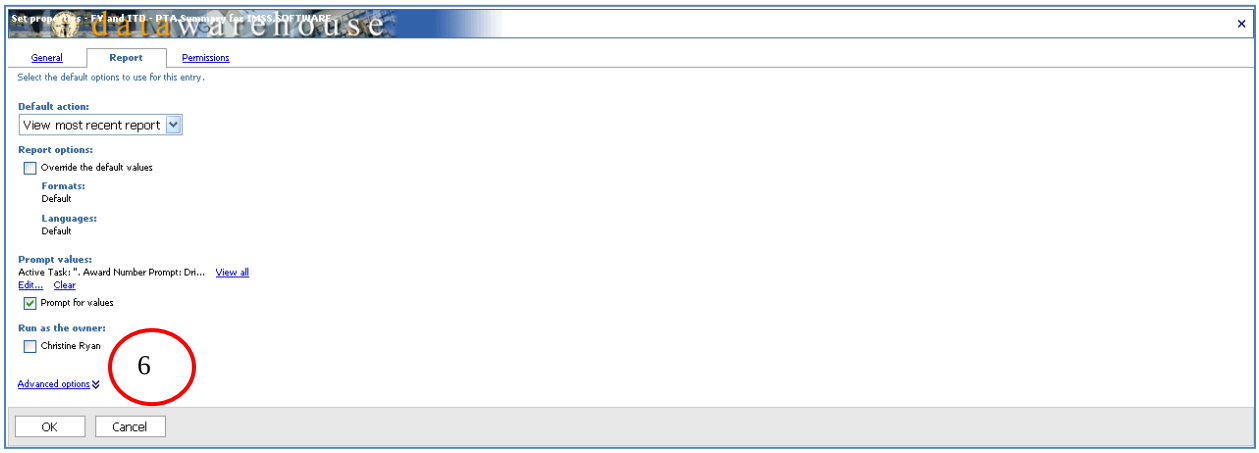
3. Click on the **Report** tab.



4. Click on **Set...** in the *Prompt values* section.

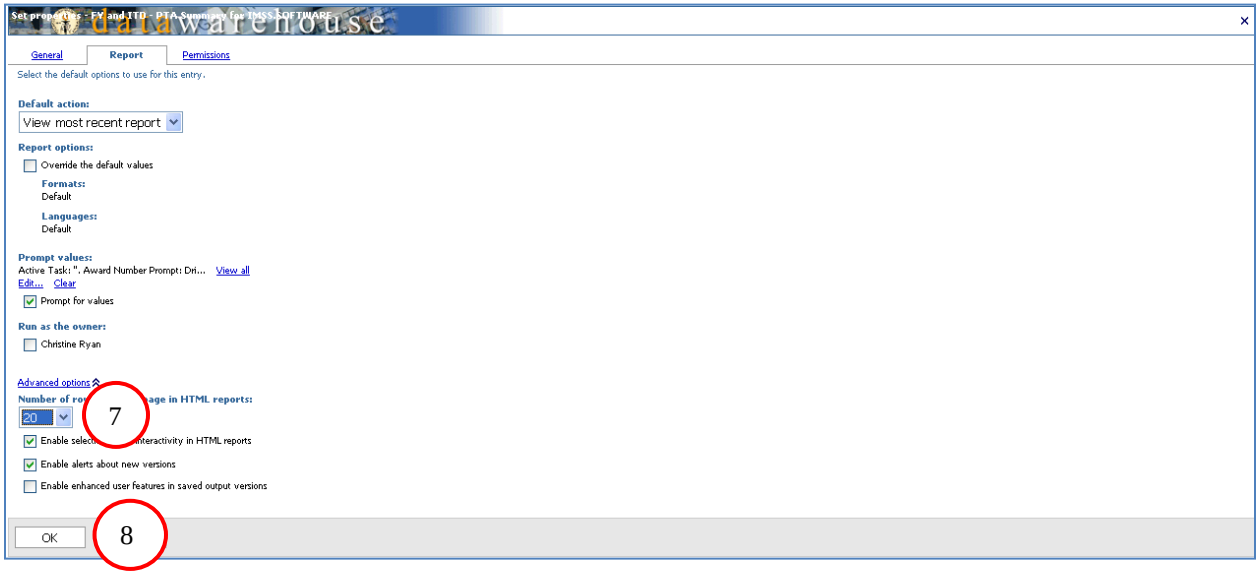


5. Enter the applicable parameters and click on the **Finish** button.



6. Click on the **Advanced options** link.

> **Note:** Only perform this step if you would like to increase the number of rows that are displayed in your report from the standard 20 rows. **If not, skip to step 8.**



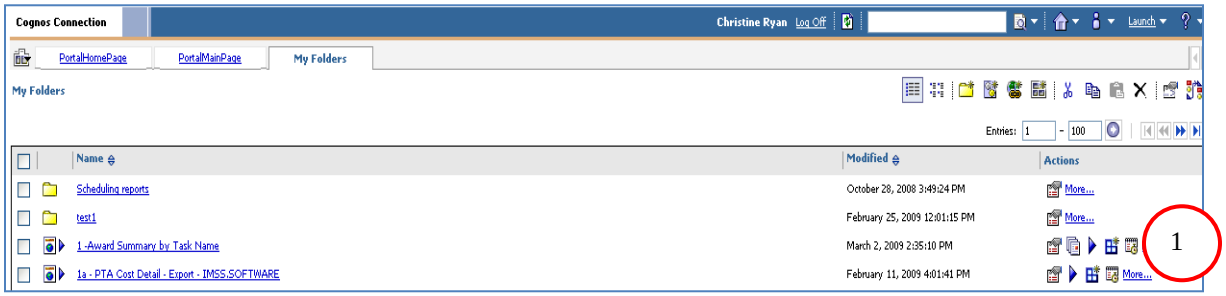
7. You can change the number of rows displayed on a page in your report by using the **Number of rows per Web page in HTML reports**: list of values

8. Click on the **OK** button.

Scheduling Reports

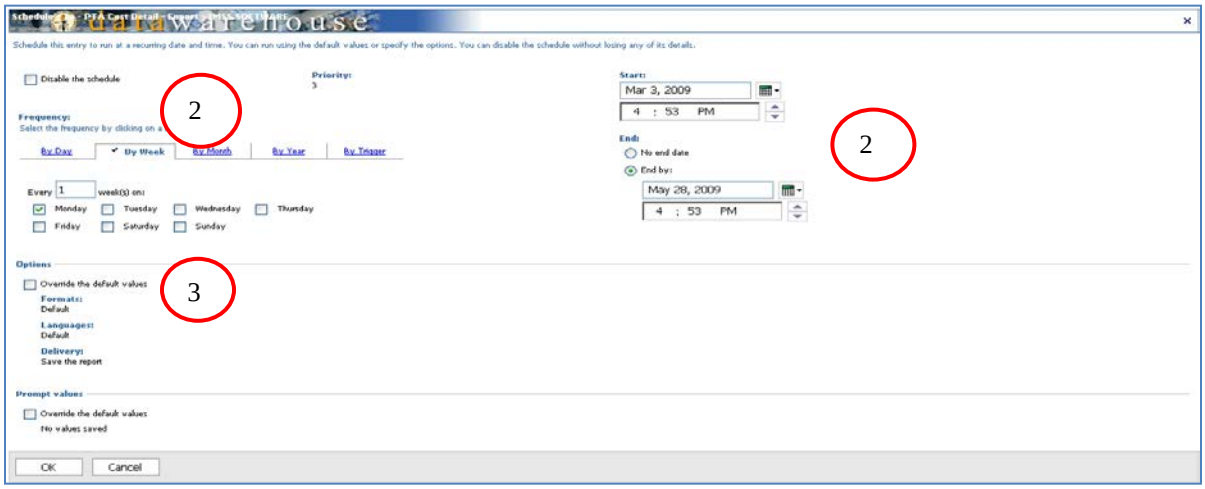
Cognos also has the capability of scheduling reports which is ideal for people that run reports against the same accounts on a regular basis. For example, if you typically run a Summary report on a weekly basis, you can schedule the report to run automatically once a week. You can also set the results to be mailed to you if you prefer.

Due to our nightly processes we recommend that you schedule your reports to run between the hours of 10am and 5pm. If it is a Summary report that you are setting up to view previous month's data, we recommend that you schedule it to run on the 2nd or 3rd date of the following month in case there is a delay in the nightly process run after the end of month close.



1. Click on the **Scheduling** icon located in the *Actions* column to the right of your report.

   The *Schedule* window will open



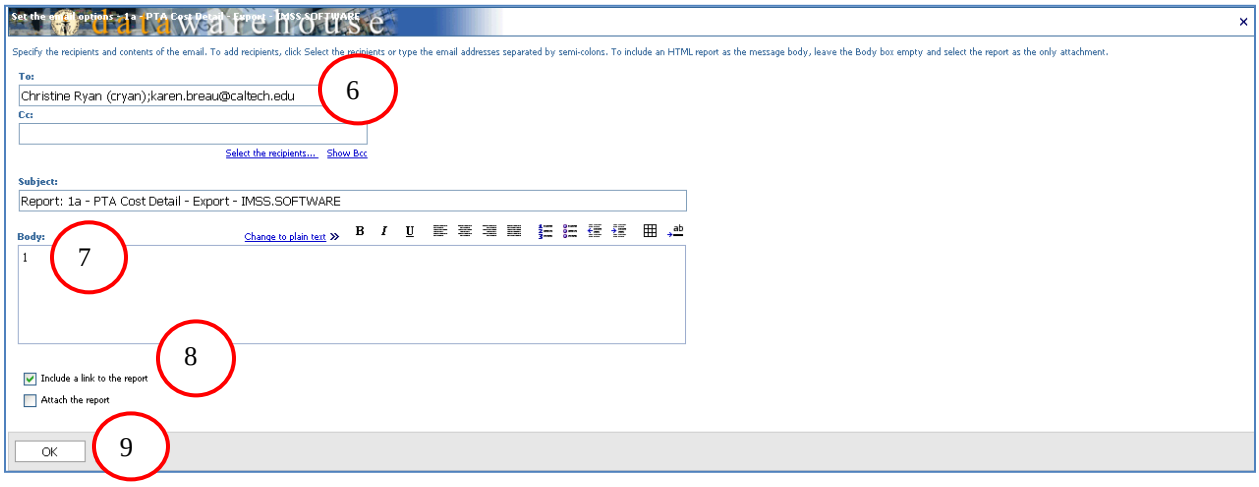
2. Schedule the **Frequency** and **Start and End dates and times**.

3. Within the *Options* section, click on the **Override the default values** box.

NOTE: The default output when scheduling a report is in HTML format. You may select additional output types (i.e. pdf, excel, etc.) from this section.

4. Click on the applicable Format (HTML, PDF, CSV or Excel Options). You can select one or multiple formats.

5. Click on the **Edit the options**.... hyperlink.



6. The **To:** field automatically defaults to your email address. Additional email addresses may be entered manually but need to be separated by a semicolon (;).

NOTE: In order to access your output you will need to click on the links within the email. When you click on the link you will be forced to enter your Cognos credentials and then the report will immediately open. Anyone added to the scheduled email must have a Cognos account in order to retrieve the reports.

7. Enter a character (i.e. the number 1) in the **Body** section (there is a bug with the scheduling that this resolves).

8. Leave the **Include a link to the report** as the default.

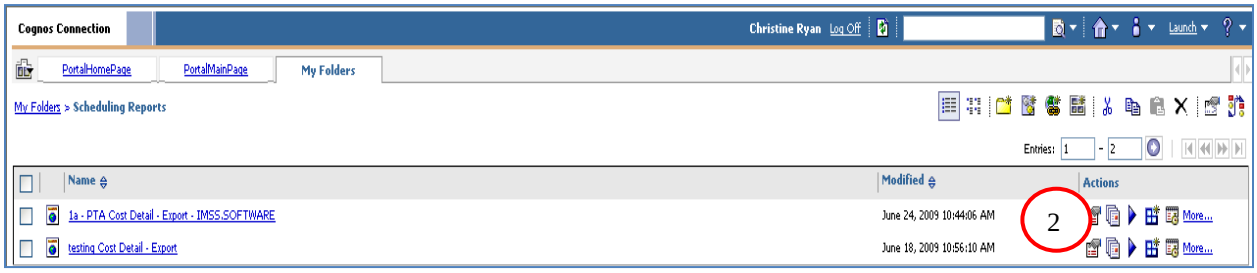
9. Click on the **OK** button.

10. Click on the **OK** button on the next window.

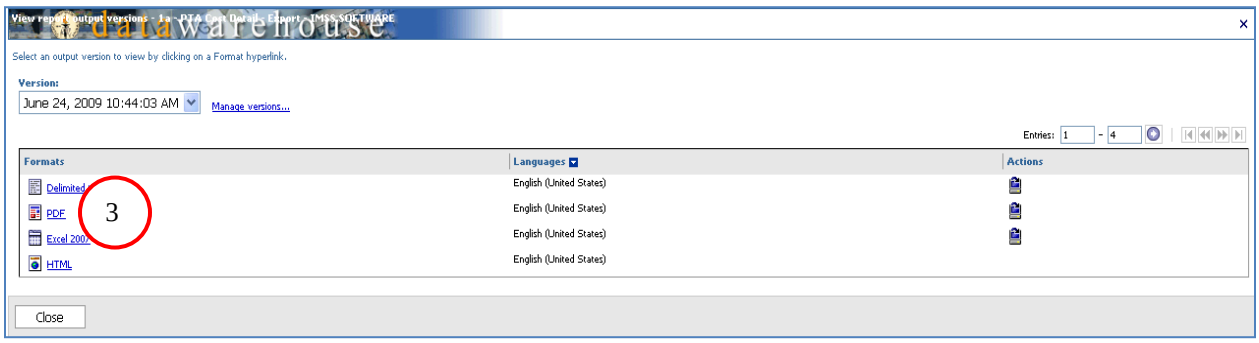
Viewing Report Output Versions

Even if you have scheduled reports to run and have selected the option of having them emailed to you, you can also view the output via the **View Managed Output Versions of this Report** in the *My Folders* area.

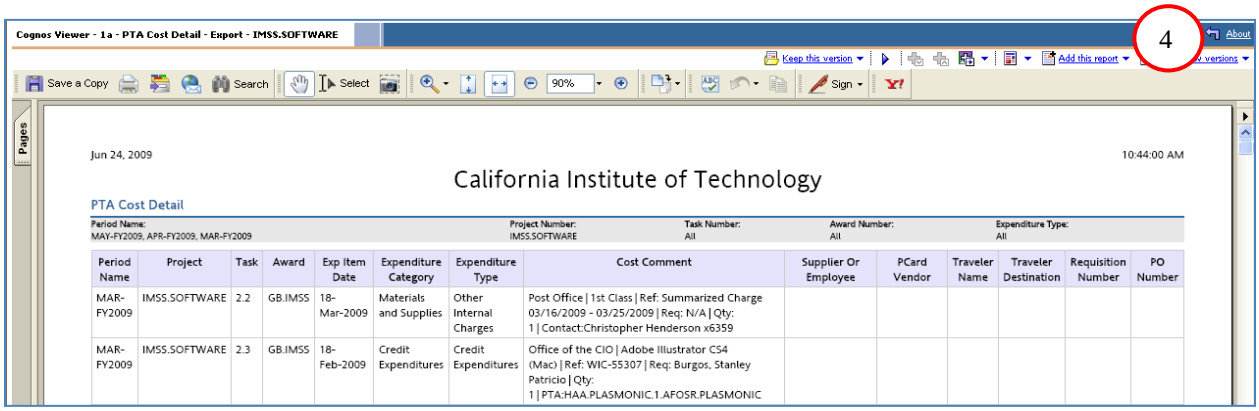
1. Navigate to the **My Folders** area.



2. Click on the **View Managed Output Versions of this Report** icon from the *Actions* column to the right of the applicable report.



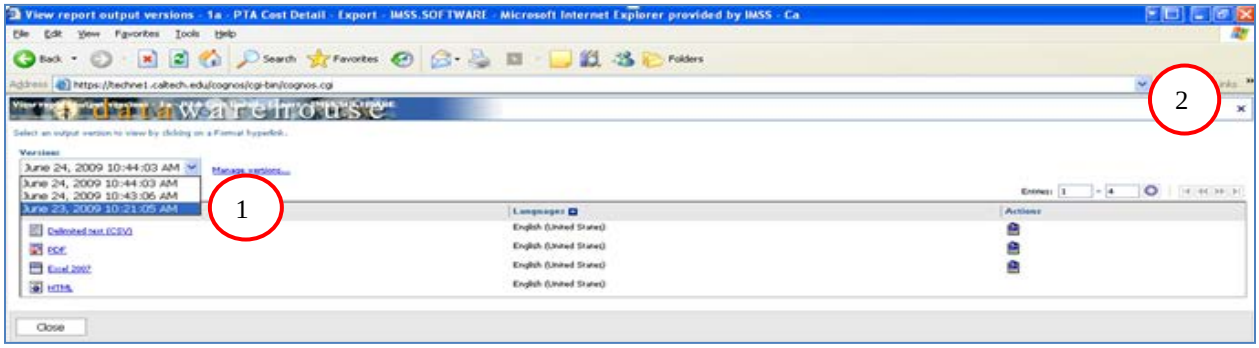
3. Click on the **PDF** link to view report.



4. Click on the **Return** icon to return to the *Versions* window.

Viewing Older Versions of Output

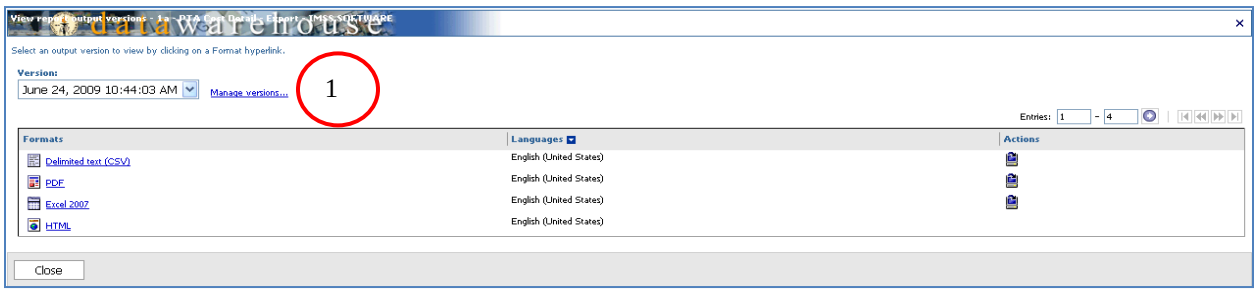
This feature is only available if you changed the **Number of Occurrences** field with the *Report output versions:* section in Step 2 of Setting the Report Parameters on Page 19.



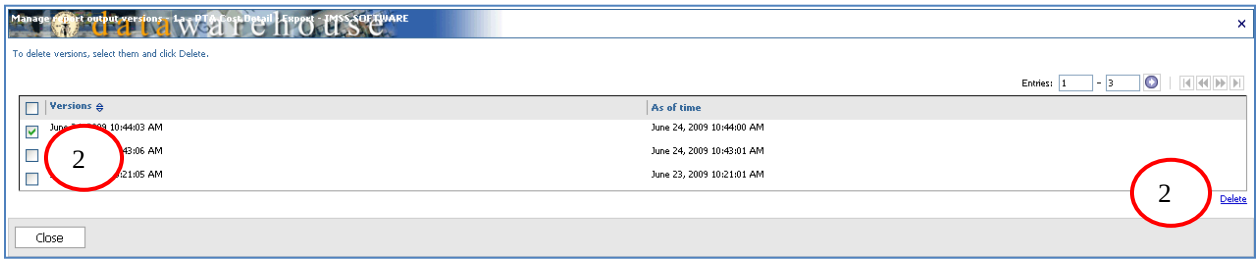
Note: The most recent Output version is displayed first.

1. Click on the **Versions drop-down menu** to select output run on a different day.
2. Click on the **x** icon in the upper right hand corner to return to the *My Folders* area.

Deleting Older Versions of Output



1. Click on the **Manage versions…** link.

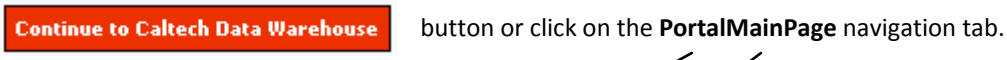


2. Click on the **box** next to the report version and then click on the **Delete** link.

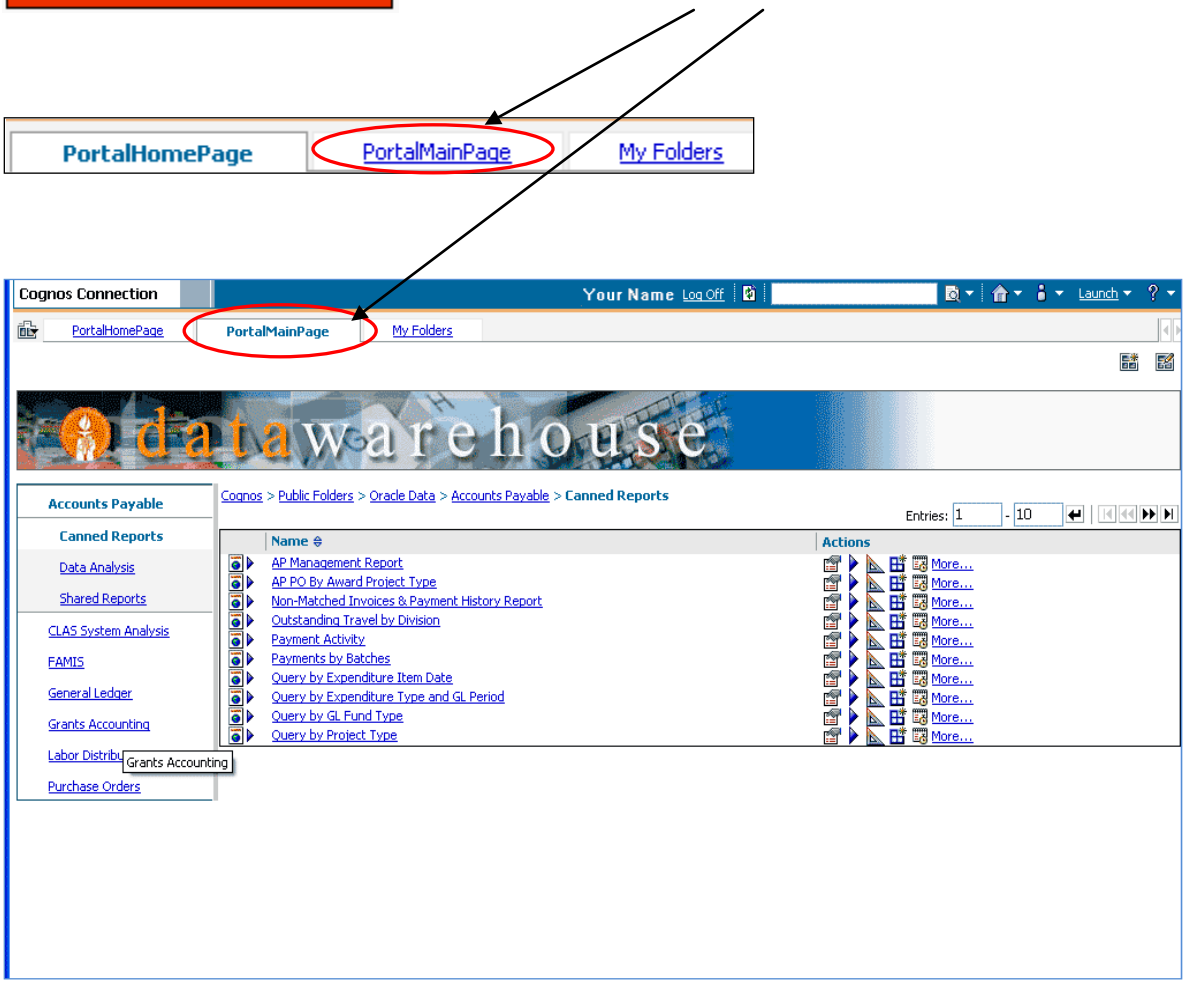
Additional Navigation Information

Using the Navigation Tabs

To navigate to the Caltech Data Warehouse main page, you click on the Continue



button or click on the **PortalMainPage** navigation tab.

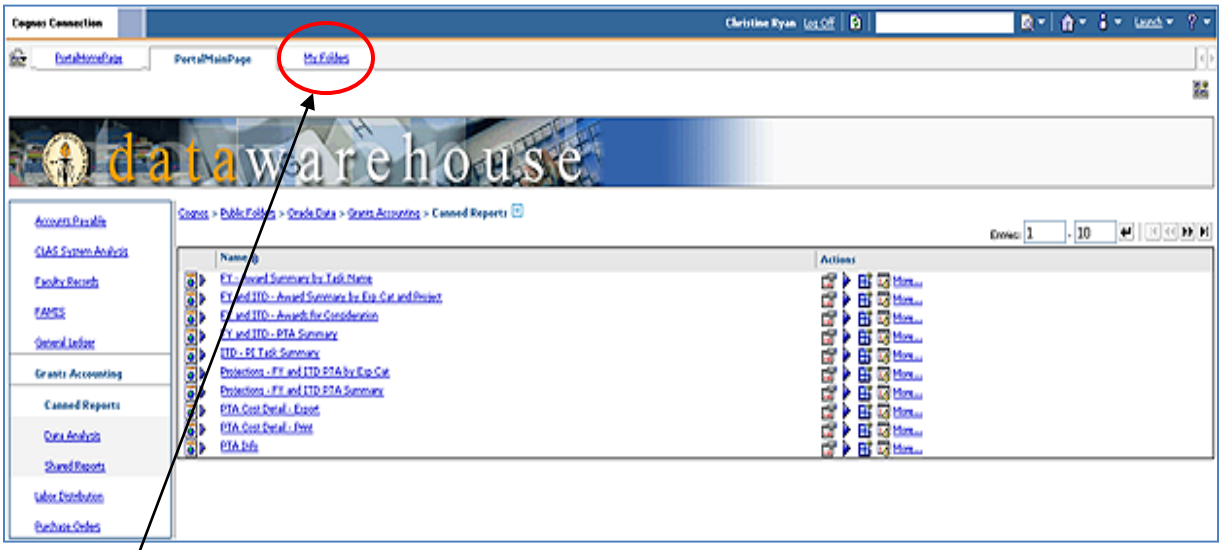


Navigation Pane

The panel on the left of the PortalMainPage displays a list of available data marts based on the individual's job requirements. On the right is a partial list of available reports within the Data mart that is highlighted. Only 10 reports are displayed at a time, in order to access additional reports you will need to click on the double arrow icon in the Entries section. Above the data marts and reports list are tab dividers for organizing reports.

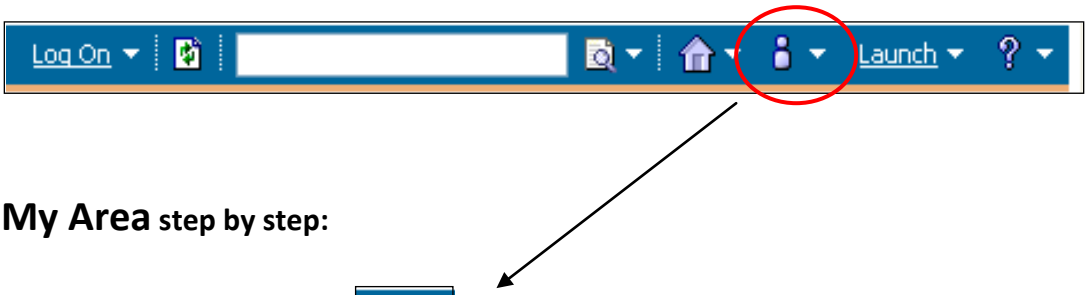
Under each data mart, the users can select from various report categories such as Canned Reports, Data Analysis, or Shared Reports. The specific report categories that are available to a user are determined by the user's privileges and report requirements.

PortalMainPage (i.e. "Data marts") is the initial view, and the user will only be required to use this link again after navigating to another option. Once a data mart is selected, folder lists are displayed. These lists are separated into tabs.



"My Folders" allows the user to manage reports that have been previously generated. The My Folders user interface will be covered in more detail in the Report Studio section.

Using the Toolbar

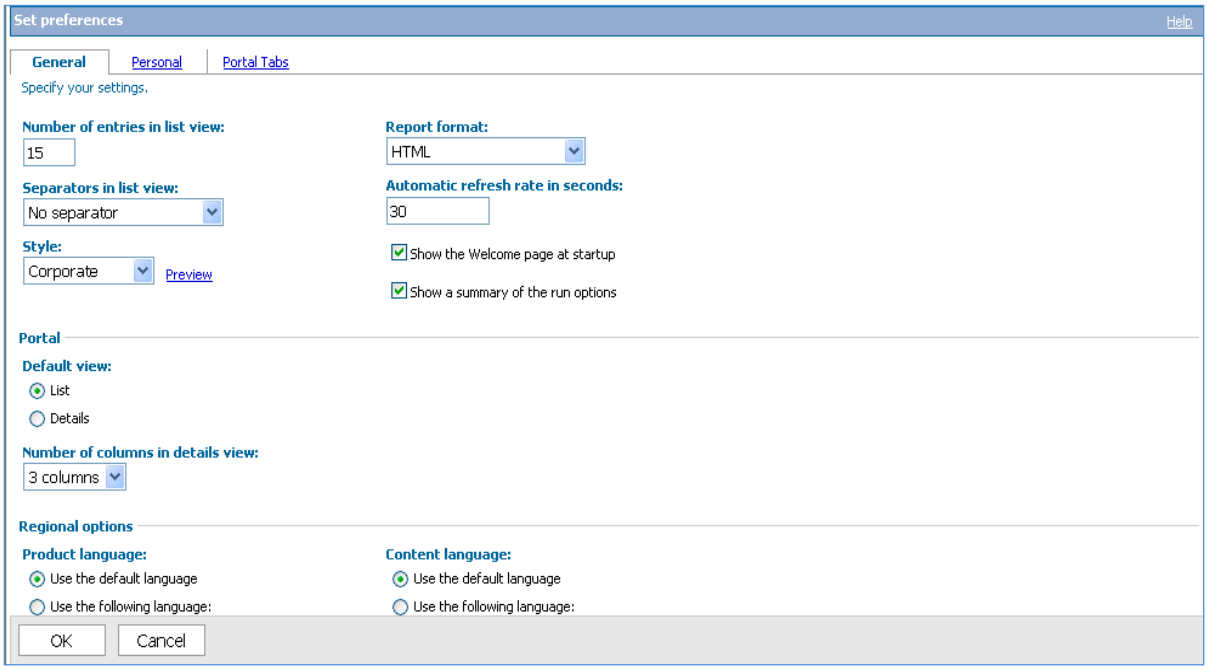


My Area step by step:

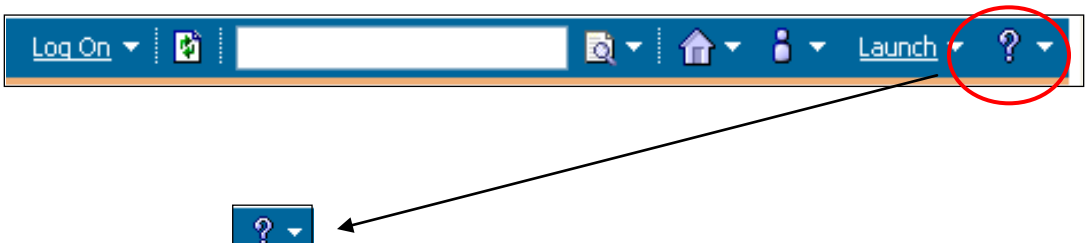
1. Click the **My Area** menu  on the navigation bar.
2. Select **My Preferences**.

The Set Preferences screen is displayed.

3. Change desired preferences, or select desired report.

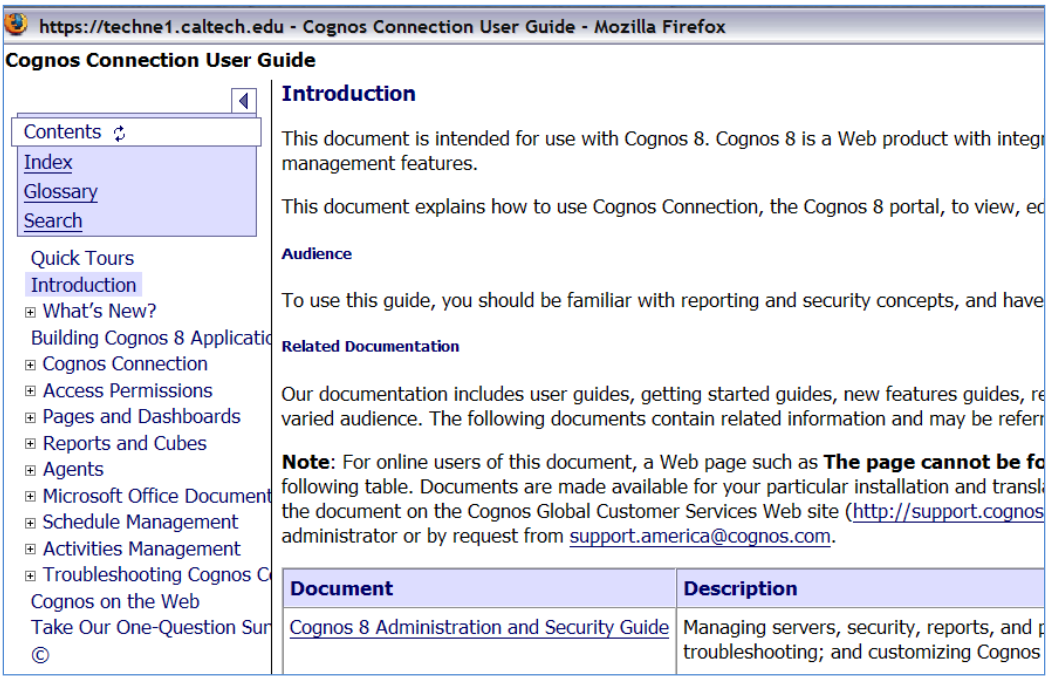


Help step by step:



1. Click the **Help** menu on the navigation bar.
2. Select **Help.**

The COGNOS help window opens.



3. Select or Search for the desired help topic.

Note: This is the generic Vendor Help documentation.

The toolbar contains additional features that are accessible within the main web portal window. These links may not be available in separate windows. These links are: *Log On / Log Off, Refresh, Search, Home,* and *Launch.*

The **Log Off** link ends a user's Caltech Data Warehouse session.

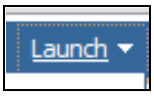
NOTE: *In order to completely protect the privacy of your data, it is strongly suggested that you close all instances of your web browser at the end of your Caltech Data Warehouse session.*

The **Refresh** link will reload the webpage.

The **Search** field assists users in locating reports.

The **Home** link will return the user either to the Welcome page or the default active page option selected by the user in Preferences.

The **Launch** link opens two report authoring applications—Query Studio and Analysis Studio—that allow the users to create customized reports and analysis. **NOTE:** Access to Query Studio and Analysis Studio is limited. The users will not see the applications or reports to which they do not have access.



- **Query Studio** is the data warehouse ad hoc reporting application. It is accessed via the Query Studio link in the *Create Reports* section of the Welcome tab or from the Launch command on the shortcut toolbar on the web portal.

- **Analysis Studio** is the data warehouse professional report development tool. It provides the ability to analyze and explore large amounts of data within data structures called *cubes*. It should only be accessed through each datamart, under the "Data Analysis" subfolder.