

Cognos Developer Guide

Using OnBase for Cognos report request will allow you, as a developer, to easily track and complete report requests, as well as to create your own request for reports that you have developed.

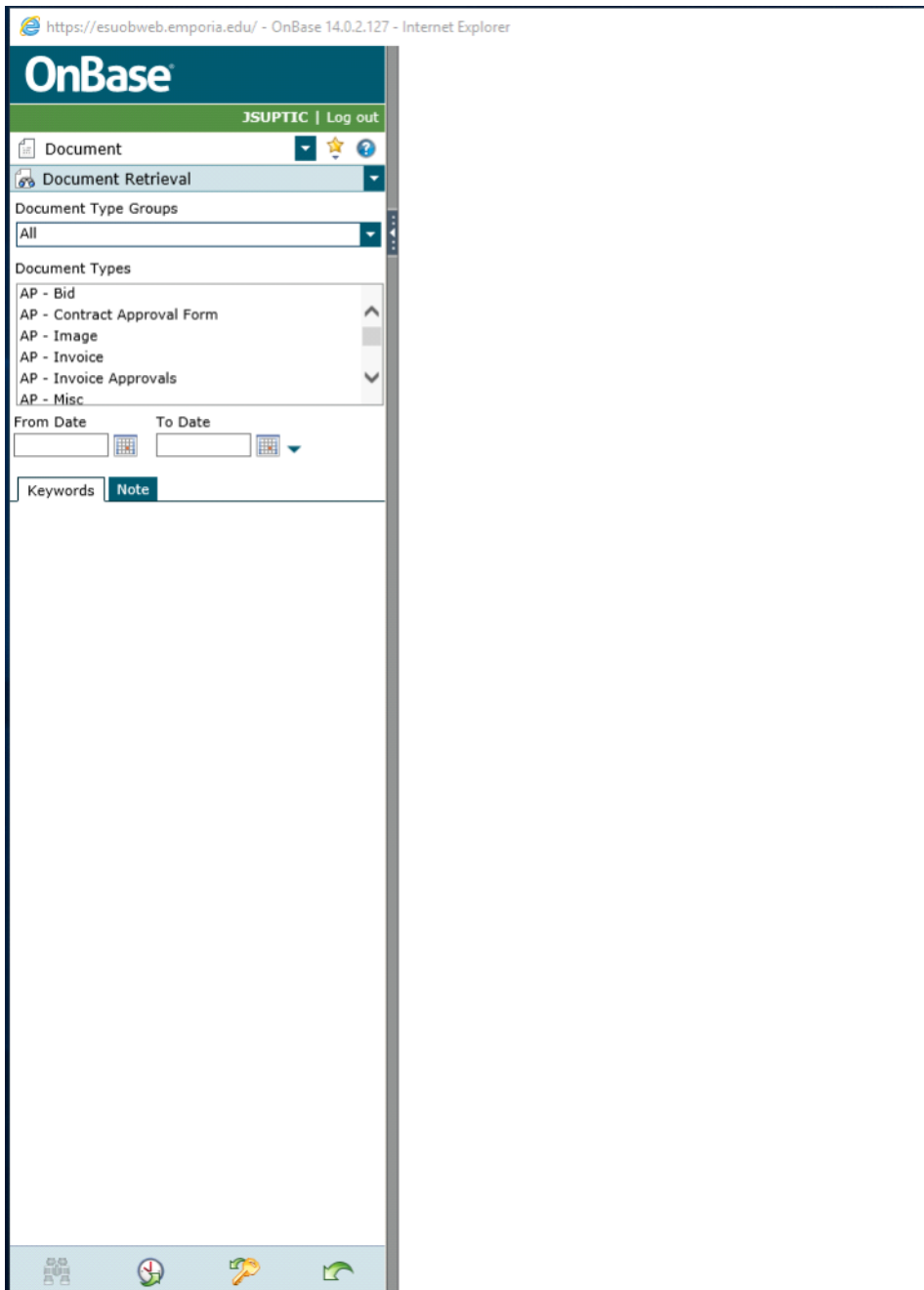
First, if you need to fill out a Cognos Report Request for a report that you have either developed or are developing please see the **Cognos Report Request OnBase Guide**.

If you have not previously used OnBase you may need to setup your computer to access the form. To do this, navigate to <http://www.emporia.edu/onbase/> and follow the instructions under Web Client Setup Guide and Tools, or contact the helpdesk and they will be able to do the setup for you.

OnBase will be used to submit, approve, track and manage all Cognos Report Requests. As a developer, you will need to understand how to navigate OnBase to retrieve report request that are assigned to you for development.

Begin by logging into OnBase by navigating to <http://www.emporia.edu/onbase/> and clicking the link OnBase AutoLogin when logged into a network computer as yourself.

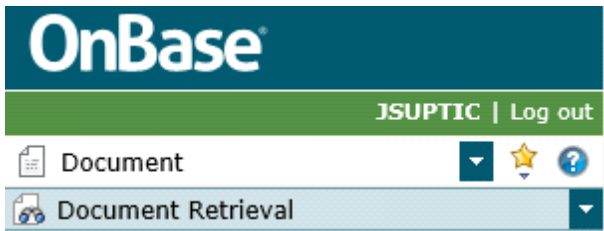
Once logged in you should see the following:



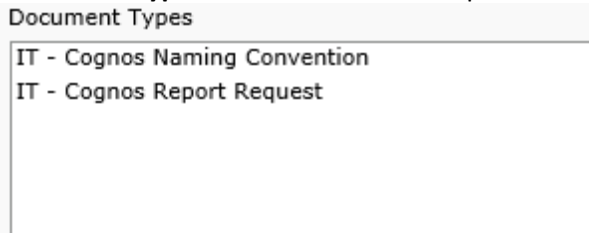
By default the top dropdown is set to Document so we will walk through the options under this view first. You will notice the second drop down has two choices Document Retrieval and New Form. The New Form option is what you would use to create a new Cognos Report Request (or to submit other OnBase forms), as such we will not discuss that here.

Since this document is focused on the Cognos Report Request, the focus of what actions to take will be based on that.

DOCUMENT RETRIEVAL



Under the **Document Type Groups** drop down select **IT Documents**. This will auto-populate the field **Document Types** with the documents specific to IT.



Select **IT - Cognos Report Request** from the list. This will cause the **Keywords** section below to display a list of keywords for that document type to narrow down search query options. You are able to search for a Report a few different ways. You are not able to do an empty search.

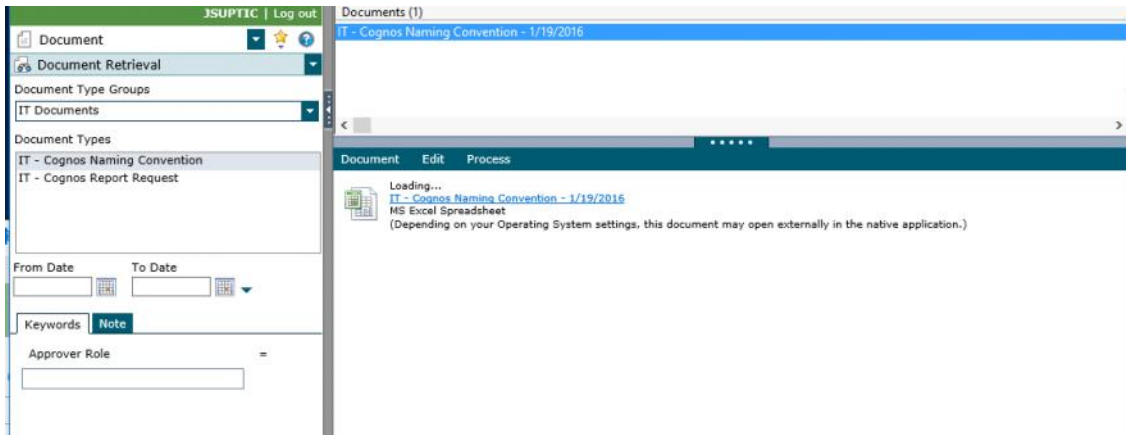
1. You can enter keywords to search on, then you can click the Binoculars to search:



2. You can search on date by selecting a From Date and To Date and then clicking on the Binocular icon. Note: If you want to search for all tickets up to the current date, then simply select a From Date and leave the To Date empty.
3. You can combine 1. and 2. to search by date range and keywords.
4. You can search by Note. This searches through notes made on the document. This is less reliable as not all documents will have a note attached to them.

A screenshot of the search interface. It includes two "From Date" and "To Date" fields with calendar icons. Below these are two tabs: "Keywords" (selected) and "Note". A "Search String" input field is present. There are also a second set of "From Date" and "To Date" fields, a "Note Owner" dropdown menu, and a "Note Types" dropdown menu currently set to "<Any>".

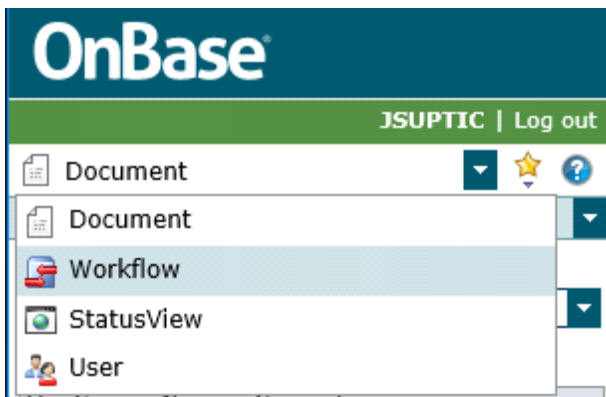
Another document that shows under Document retrieval is **IT - Cognos Naming Convention**. This is the document you will use when you are naming a new report request, whether created by you or a Cognos user. To retrieve this document, simply select it and click the Binocular icon. This should start an automatic download of the document. If not, you can click on the link in the right side panel of OnBase next to the excel icon.



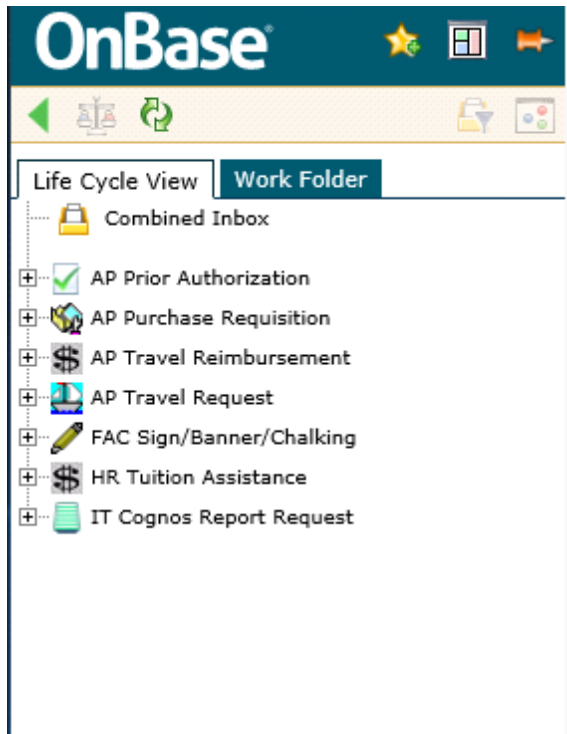
Following the naming convention will not only help organize the Cognos environment, but will also aid in searching report requests and figuring out if a similar request already exists.

WORKFLOW

Typically you will receive a link in your email that will take you to a new request in workflow. However, you can also enter workflow manually.



Begin by selecting Workflow from the dropdown menu. This should open a new window. In the upper left of the new window you should see something similar to the following:



You will want to click on the + next to IT Cognos Report Request, at which point you will see something similar to the following (you may see more queues as a developer):



The two areas you will focus on most of the time will be **Originator** and **Cognos Developer**.

Originator: This is where requests that you have saved for later, or requests that have been sent back to you by an approver will appear. This section is discussed in the document on Creating a New Cognos Report Request.

Cognos Developer: In this section you will see reports that are in queue for development. You will see all developers documents here, this is so you can assist other developers more easily. Below is a screen shot of what you may see in the **Cognos Developers** pane.

| Documents | |
|--|-----------------------|
| ◀ Previous Results | ▶ Next Results |
| ⚙ Options | |
| Documents (3) | Entry Date |
| IT - Cognos Report Request 152 - 1/12/2016 - ADELMOTT - Humdinger Report - JSUPTIC D... | 1/12/2016 1:42:22 PM |
| IT - Cognos Report Request 172 - 1/14/2016 - CSCHRECK - - JSUPTIC Development | 1/20/2016 10:47:18 AM |
| IT - Cognos Report Request 174 - 1/14/2016 - JKORD - - JSUPTIC Development | 1/20/2016 10:47:20 AM |

| | | |
|------------------|----------------|----------|
| Request Complete | Email Question | Reassign |
|------------------|----------------|----------|

The user ID on the left is the requestor and the User ID on the right is the developer. For instance you can see that ADELMOTT requested a Humdinger Report and it is being developed by JSUPTIC.

NOTE: Before developing a report you need to do three things.

1. Check if a similar report exists that you can point the user to.
2. Check if the data seems legitimate for what the report is asking for. As an example: Suppose a report description is a list of employee emails for birthday cards, but the requestor ask for SSN, Name, Blood type, Income Level etc. This should set off red flags that you need to contact the requestor and ask that the information requested be cut back to a more reasonable amount.
3. Give the report a name. Retrieve the **IT - Cognos Naming Convention** mentioned above and follow the directions to name the report.

Once these three steps are done you will want to click Save on the report.

If you have already contacted a user, but still feel the level of detail requested is inappropriate, please contact the Cognos Administrator.

If it is deemed that a report already exists and you feel the request should be deleted, please contact the Cognos Administrator.

Now that you have request that is ready to be developed you have a few options.

1. **Request Complete** - Click on the report that you are ready to complete. Scroll to the bottom of the report in the lower part of the screen and write any notes needed in the **Notes to Originator text box** -- this should include where the report is to be located. Click Save. Now select the report again in the Documents section

| Documents | |
|--|-----------------------|
| ◀ Previous Results | ▶ Next Results |
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Once selected click on **Request Complete**. The following text should appear:

Notes to Originator will be emailed. Click Yes to email this reason, click no to change the reason. Done

Click Yes to email the Originator (original requestor) with the notes you just entered, or click no to change the notes. Once complete you should see the request leave the Documents section. Note: OnBase can take up to 30 seconds to process a request, so please be patient. If you have done this and the request remains in the Documents area, then try to click Request Complete again.

- 2. Email Question** - If you have a question for the requestor that you want to document with the request, you can type the question in the Notes to Originator section. After you type the question click Save, then click Email Question, you will be prompted to check if the question is correct.
- 3. Reassign** - If a request needs to be reassigned to another developer you can use this option. First click on the form under the Documents section in Workflow. Next, scroll to the bottom of the report where the developer is listed. Select the developer you want to reassign it to, then click save. Now select that report in the Documents section and click the Reassign button.

One last note:

If you are curious about the history of a report request you can right click the request in the Document area in Workflow and select History. There is a tab for Document History, Workflow Queues and Workflow Transactions. This will allow you to see who edited the request, who approved it, where it is in the approval process and more.