Creating a New Cognos Report Request

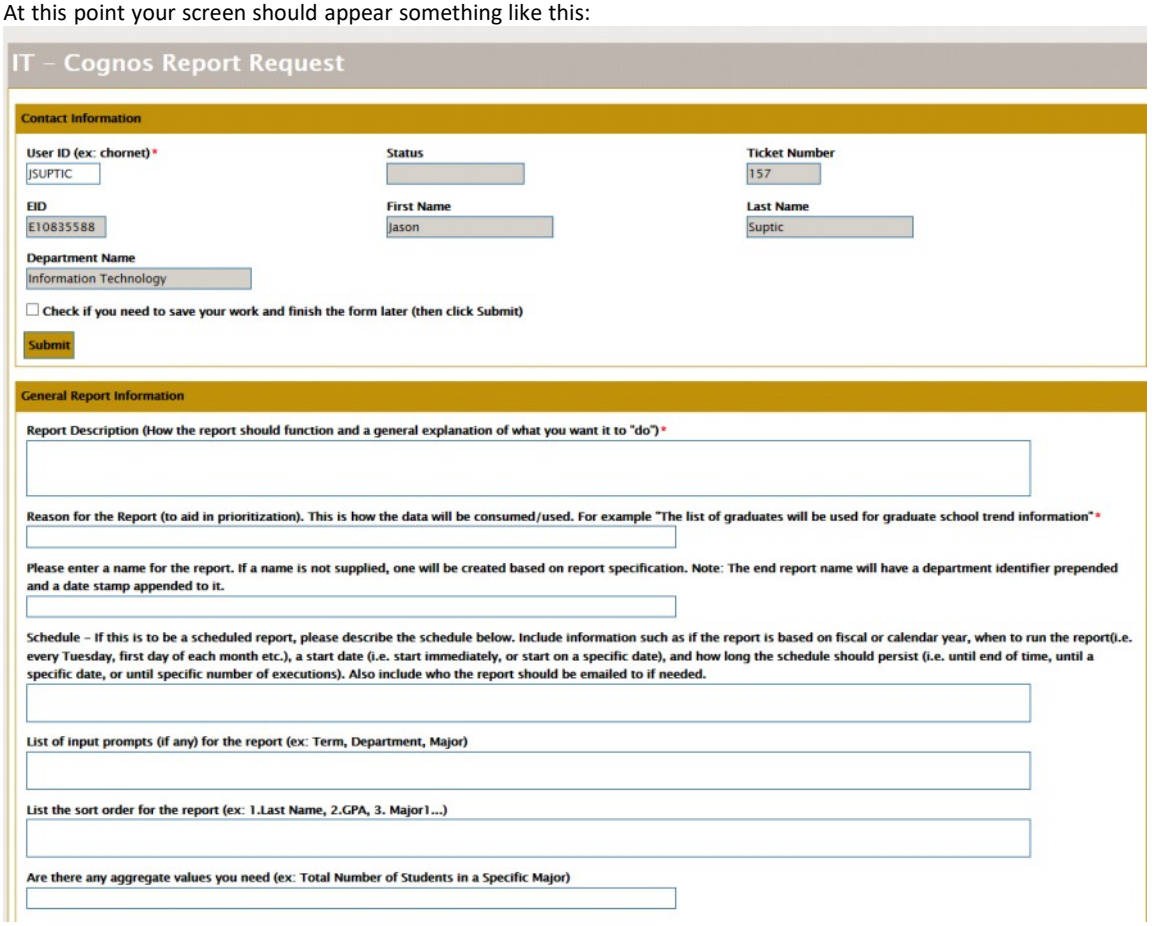
Wednesday, January 13, 2016 11:08 AM

Creating a Cognos Report Request is simple using the OnBase Cognos Report Request form and will help get your reporting needs met quickly and efficiently. OnBase uses a system called WorkFlow that will automatically route request forms once you submit them.

I you have not previously used OnBase you may need to setup your computer to access the form. To do this, navigate to https://www.emporia.edu/onbase/ .

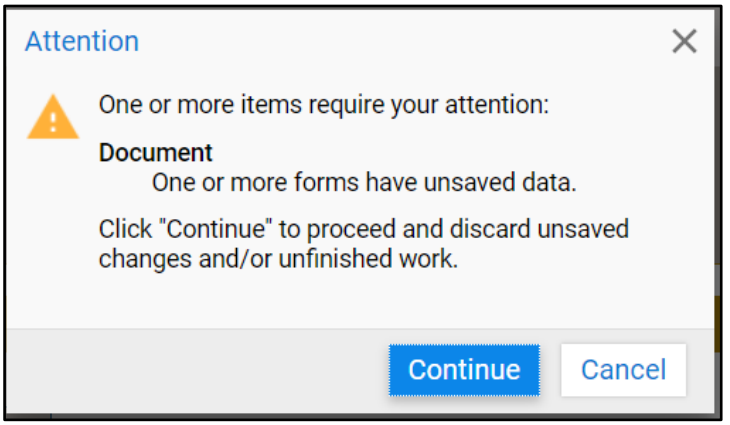
To create a new Cognos Report Request you will need to go to https://www.emporia.edu/onbase/ . Click on the Form Central tab. You should see a link labeled Cognos Custom Report Request Form under the IT + Access Forms section. Clicking on this link will take you directly to the form.

At this point your screen should appear something like this:



A couple quick notes:

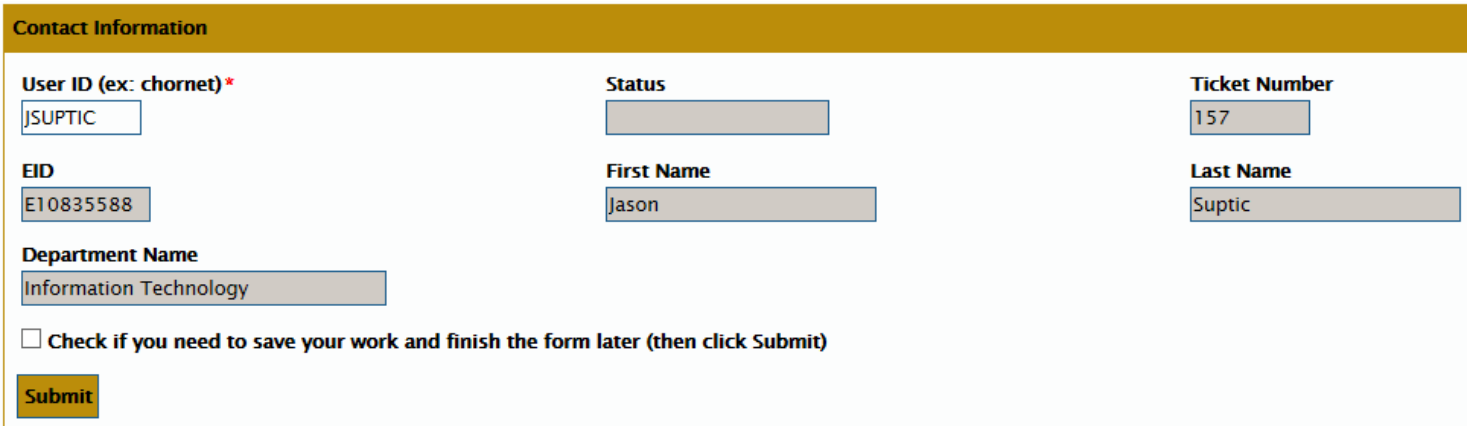
1. Sections on the form are shown with a gold title bar and gold edges. To collapse a section simply click on the gold title bar. To expand a section click on the gold title bar again.
2. Any box whose description has an asterisk at the end is required. If you attempt to submit a form without filling in a required section you will get a popup error that states "One or more fields are invalid." The invalid fields will be highlighted pink.
3. Sometimes when you try to exit the forms you may get the following popup:



If you made changes to the form, click Cancel, then click save on the form. If you are certain you made no change click Continue. Otherwise click Cancel.

Now we will walk through the form section by section, starting with Contact Information:

Contact Information:



Your contact information is auto filled and can only be changed by a report developer or administrator.

In the contact information section there is a check box to save your work for later. After you check this, click the Submit button just under the checkbox. This will save the form and send you an email with a link to the location of the form in WorkFlow so that you may finish completing the request at a later time.

General Report Information:

General Report Information

Report Description (How the report should function and a general explanation of what you want it to "do") *

Reason for the Report (to aid in prioritization). This is how the data will be consumed/used. For example "The list of graduates will be used for graduate school trend information" *

Please enter a name for the report. If a name is not supplied, one will be created based on report specification. Note: The end report name will have a department identifier prepended and a date stamp appended to it.

Schedule – If this is to be a scheduled report, please describe the schedule below. Include information such as if the report is based on fiscal or calendar year, when to run the report(i.e. every Tuesday, first day of each month etc.), a start date (i.e. start immediately, or start on a specific date), and how long the schedule should persist (i.e. until end of time, until a specific date, or until specific number of executions). Also include who the report should be emailed to if needed.

List of input prompts (if any) for the report (ex: Term, Department, Major)

List the sort order for the report (ex: 1.Last Name, 2.GPA, 3. Major1...)

Are there any aggregate values you need (ex: Total Number of Students in a Specific Major)

Date Report is Needed (please allow two weeks) *

Document (report) File Format *

Please click the ADD button on the right to allow others to access this report.

Please provide Name, Department and Email Address of all users requiring access to the Workspace or Report **Add**

Reporting Module *

There are a few points to notice about this section.

1. **Report Description** and **Reason for the Report** are not the same thing. A description would be something like "We need a list of students birthdays in the current month," whereas the reason may be "This list will be used to send a note on behalf of the president for the students birthdays."
2. **Date Report is Needed** must be after current date.
3. **Default Document File Format** lets you decide the default format of the report.
4. To add people who will need access to the report click the Add button located on the far right side of the gold section bar, and enter the persons information. You will need to do this for each person requiring access to the form. The section will expand to the following:

   Please provide Name, Department and Email Address of all users requiring access to the Workspace or Report **Add**

   Full Name **Department** **UserID** * **Remove**

   Notice that UserID becomes required. To add someone all you need is their UserID. However, to expedite approval it is best to include their Full Name and Department as well.
5. The reporting module is the main focus of the report. Based on the reporting module that you select from the drop down, different sections of the form will expand. Even if a section does not expand after selecting the reporting module, you can expand it manually by clicking on the gold title bar. Here is the module dropdown:

   Finance
   Financial Aid
   HR/Payroll
   OnBase
   Other
   RMS
   Student

   We realize that all possible modules may not be included, that is why we have supplied an option

for Other.

Data Requested Sections:
Each of the data requested sections will have a set of check boxes that contain common parameters/fields that we include in our reports. There is also a box to type any other desired parameters/fields to include.
For example here is the Payroll, HR, RMS, OnBase or Other section:

Payroll, HR, RMS, OnBase or Other<<Click here to expand or collapse section>>>

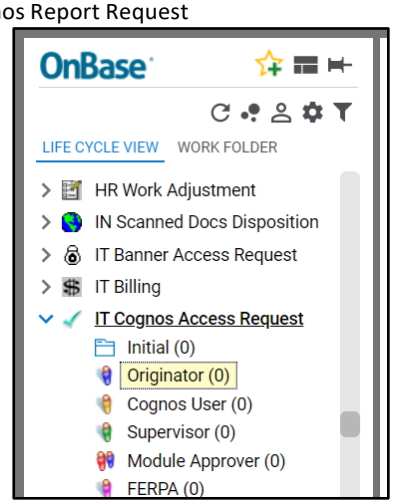
☐ Employee Status (active/term)	☐ Original Hire Date	☐ Position Number/Suffix
☐ Job Title	☐ Current Hire Date	☐ Home ORGN#/Dept Name
☐ ECLS	☐ Adjusted Service Date	☐ FOAPAL (Fund/Org/Acct/Prog/Actv/Locn)
☐ Academic Year	☐ Calendar Year	☐ Fiscal Year

Please list any other desired parameters (fields to display on the report)

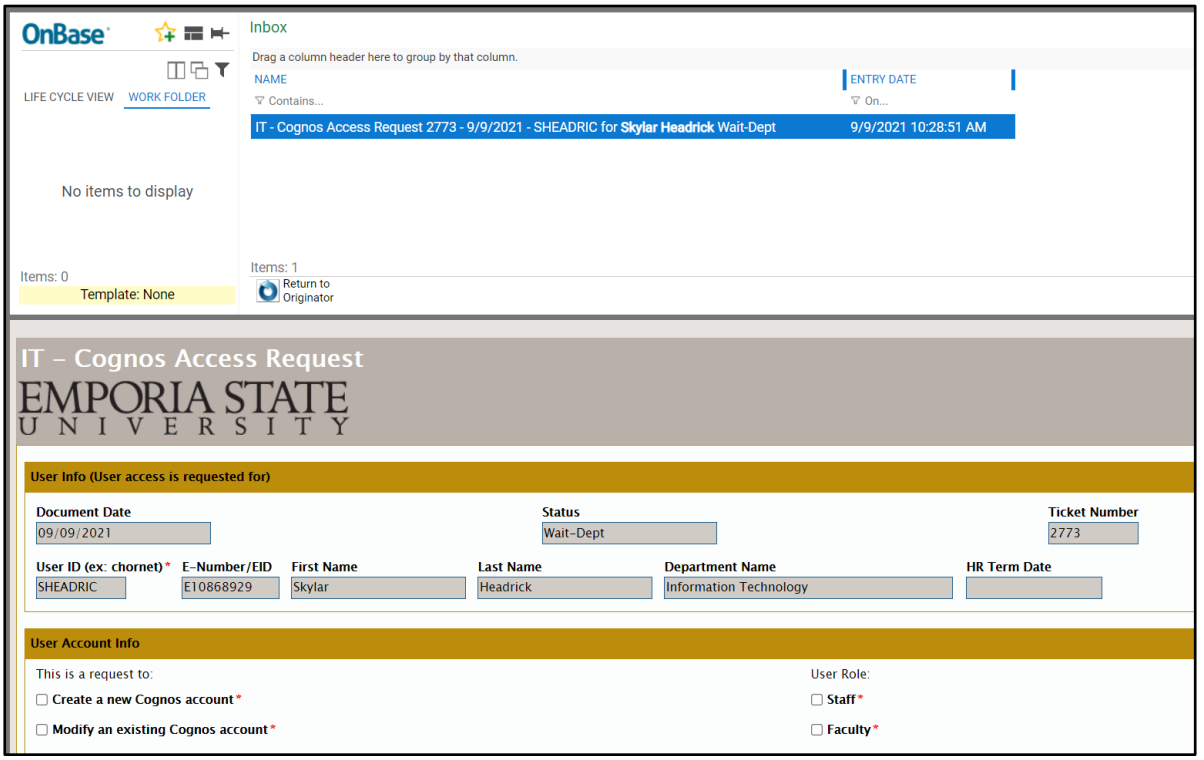
When you are finished:
Once you have filled in all the fields you can either go back to the top of the form and save it for later or you can Submit it. If you Submit it you are done, the form will automatically route to the proper departments for approval and then to the Cognos administrator who will assign the report to a developer.
Please note: If you need to save the form for later completion, then the required fields do not need to be filled in until you are ready to submit.

Retrieving and Continuing a Saved Form:
If you decide to save the form for later you will need to follow the steps below to retrieve the form to complete it or discard it.

1. Navigate to http://emporia.edu/onbase/
2. Click OnBase Workflow Login.
3. On the left of your screen ensure Life Cycle View is selected and click the plus sign next to IT Cognos Report Request



4. If you have any reports saved, they will show up under Originator
   Clicking the word Originator will populate a list of requests you have saved for later.



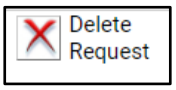
5. You can edit the report and then do one of three things:
   a. Click the Save button inside the report, if you made any changes. In this case the report WILL NOT be submitted, but your work will be saved.
   b. Uncheck the box at the top of your form

      ☐ **Check if you need to save your work and finish the form later (then click Submit)**

      And click the Route button in the top section of the screen:

      In this case the request WILL be submitted.
   c. Click the Withdraw Report Request button in the top section of the screen:

      In this case the report will be discarded and if you wish to create the request, you will need to restart the request.