

U.S. Fish and Wildlife Service

Cognos Application Suite - User Guide

July 2005

U.S. Fish and Wildlife Service

Submitted by

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Section 1: Introduction

1.1 Introduction

The Fish and Wildlife Service (FWS) Activity-Based Costing (ABC) project team recently completed the implementation of the Cognos report tool suite to support the FWS cost and performance management initiative. Cognos is a market leader in providing business intelligence solutions to organizations across a broad range of industries. The FWS project team believes that the Cognos application suite will help FWS personnel to best access, organize, analyze, and understand FWS cost and performance data.

The Cognos application suite includes the following tools:

- ReportNet
- QueryStudio
- PowerPlay
- Metrics Manager*

This manual provides Cognos ReportNet, Query Studio, and PowerPlay end-users instruction on how to access and use the Cognos tools in order to view and build FWS ABC reports.

***Note:** Training and instruction on Metrics Manager is not included in this document. Metrics Manager will be deployed toward the latter part of the summer and appropriate training will be provided.

This document provides step-by-step instruction on how to:

- Log into and access the Cognos application suite
- Use Report Viewer to view and export standard quarterly reports
- Use Query Studio to create ad-hoc queries
- Use PowerPlay to build reports based off of On-line Analytical Processing (OLAP) multi-dimensional data cubes

Section 2: Access Cognos

2.1 Connect to Cognos

One major benefit to the Cognos application suite is that it is 'zero-client'. In other words, the end-user does not have to download or install any software onto his/her personal computer, but rather, accesses the application through the internet browser.

To access Cognos:

1. Open your browser (Internet Explorer).
2. Type the following URL into the browser: <http://ifw9wo-bas-sas/crn>
3. Click 'Enter'

Figure 1 below displays the home page after accessing the URL above.

Cognos Connection – Home Page

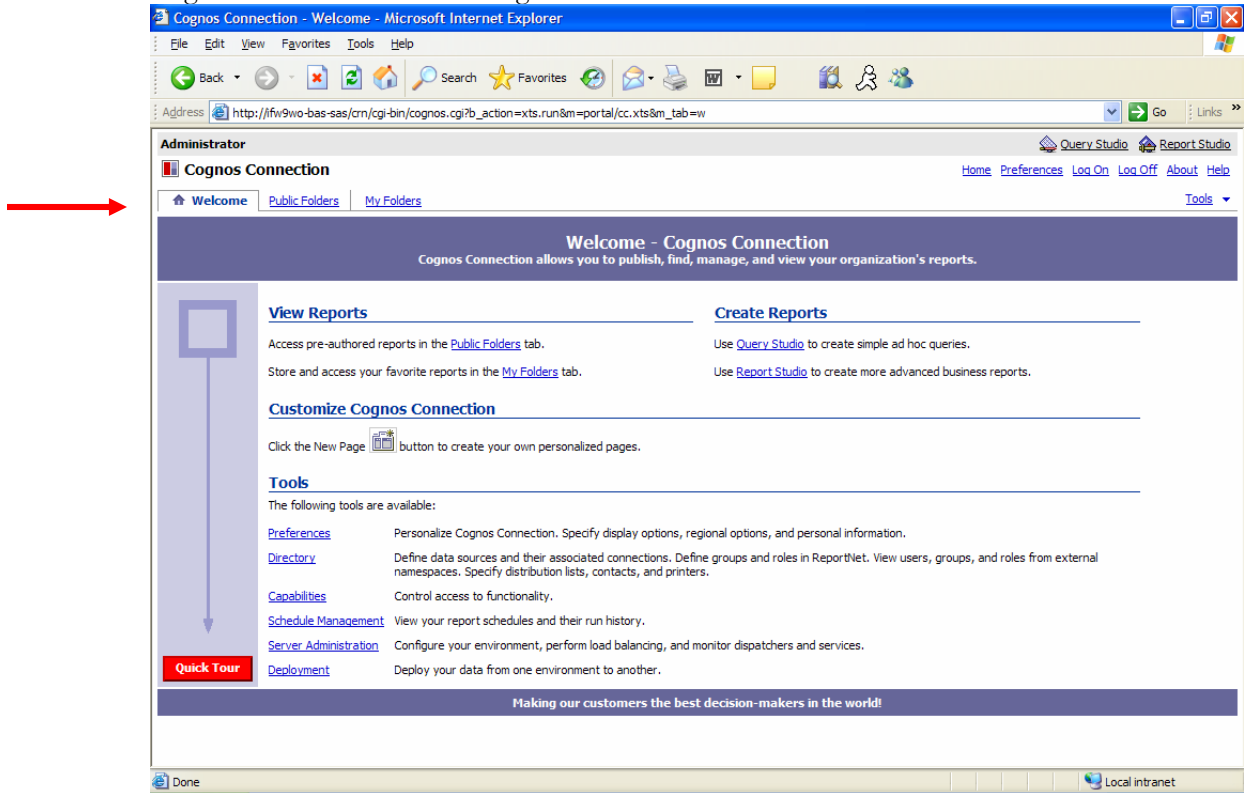


Figure 1 - The Cognos Connection home page.

The permissions assigned to you by your Cognos administrator will dictate what links you will see on the Cognos Connection home page. In addition to a link to Query Studio, each FWS ‘power user’ will see the following tabs:

- Welcome
- Public Folders
- My Folders

Section 3: Folder Access

3.1 Public Folders

Public Folders

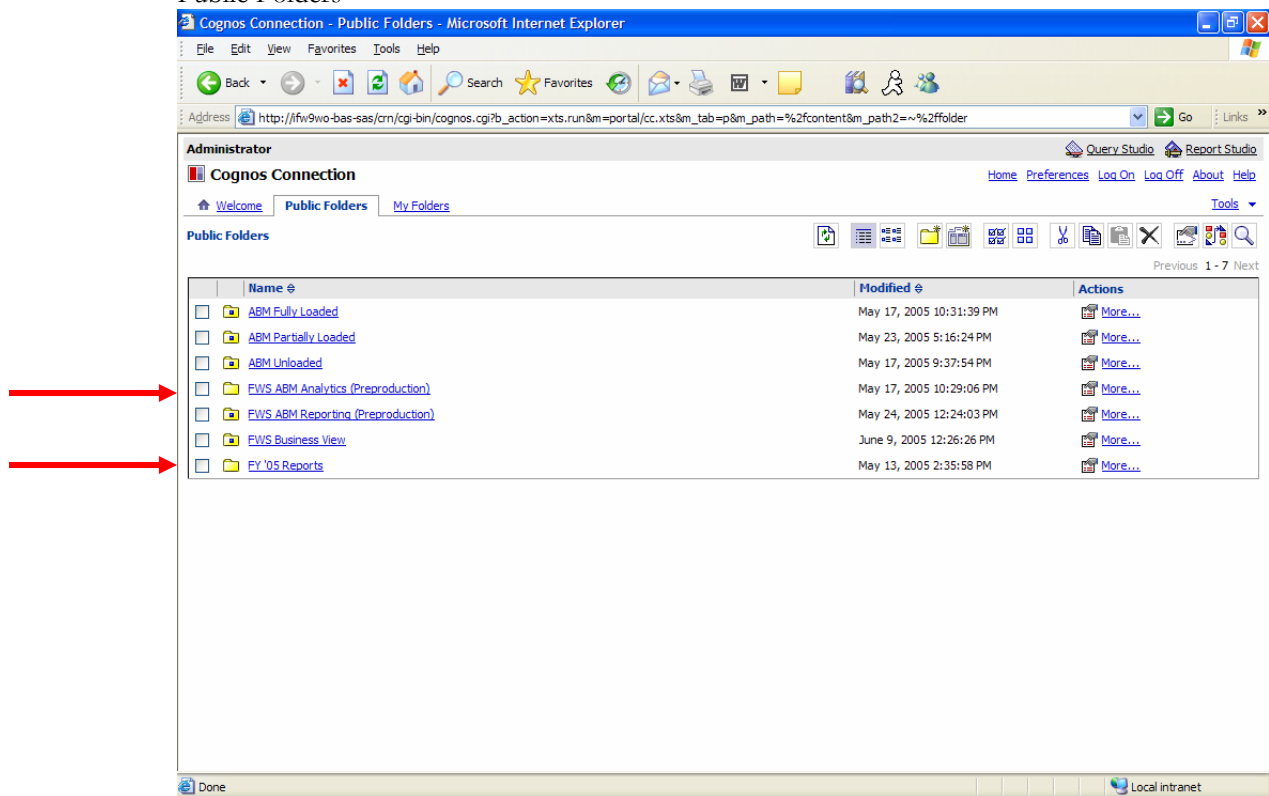


Figure 2 – Only those folders permissible for you to access will be listed under the ‘Public Folders’ tab. Figure 2 depicts an ‘Administrators’ view.

The folders listed within the ‘Public Folders’ tab, maintain the set of standard reports and PowerPlay cubes developed by the FWS ABC project team. The standard reports and PowerPlay cubes can be accessed by clicking on the following folders, respectively, as seen in Figure 2 above.

- FY '05 Reports
- FWS ABM Analytics (Preproduction)

FY '05 Reports Folder

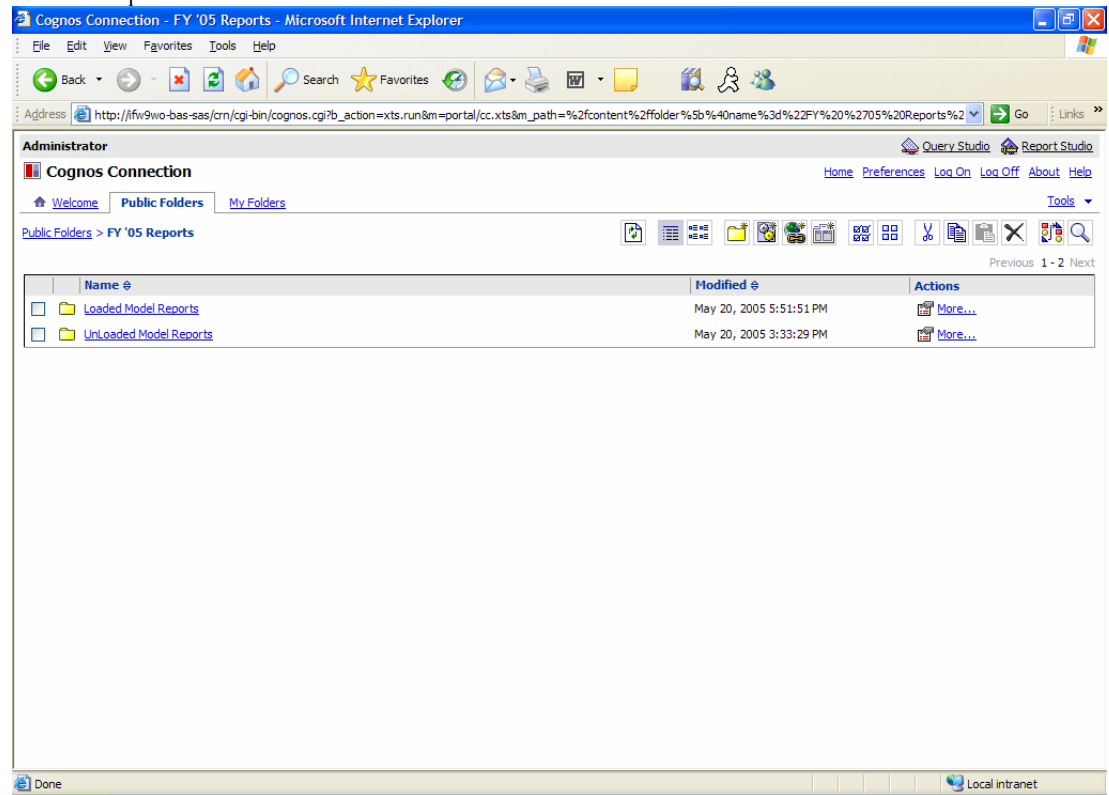


Figure 3 – The 'FY '05 Reports' folder is further organized into subfolders.

1. Click on the folder labeled 'FY '05 Reports'.

Notice in Figure 3 above the 'FY '05 Reports' folder is further organized into subfolders labeled 'Loaded Model Reports' and 'Unloaded Model Reports'. Reports referencing data from the different ABC models can be found in the appropriately labeled folder.

Unloaded Model Reports Folder

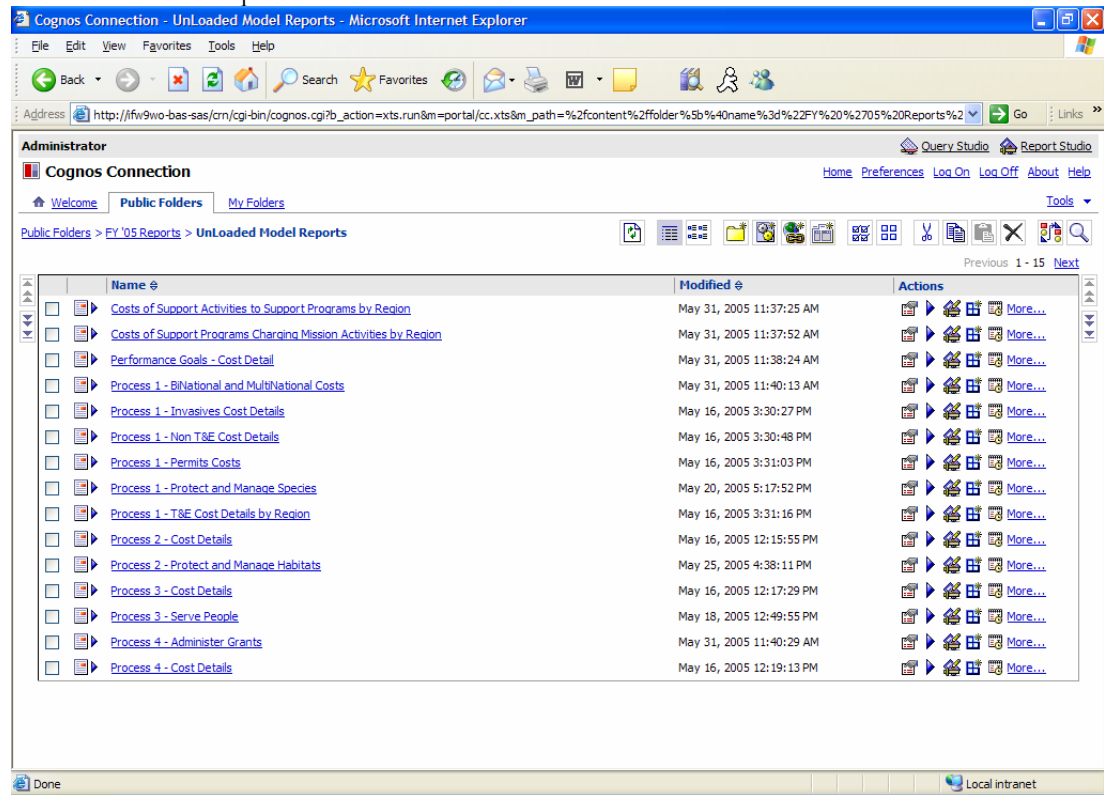


Figure 4 – The set of standard reports listed in the ‘Unloaded Model Reports’ folder

- Click on the folder labeled ‘Unloaded Model Reports’ folder.

After clicking the on the ‘Unloaded Model Reports’ folder, you will notice, as shown in Figure 4 above, the set of standard unloaded model reports created by the FWS ABC project team.

To view a report, simply click on the name of the report. A basic overview of the functionality accompanying the Report Viewer is provided in Section 4.

FWS ABM Analytics (Preproduction)

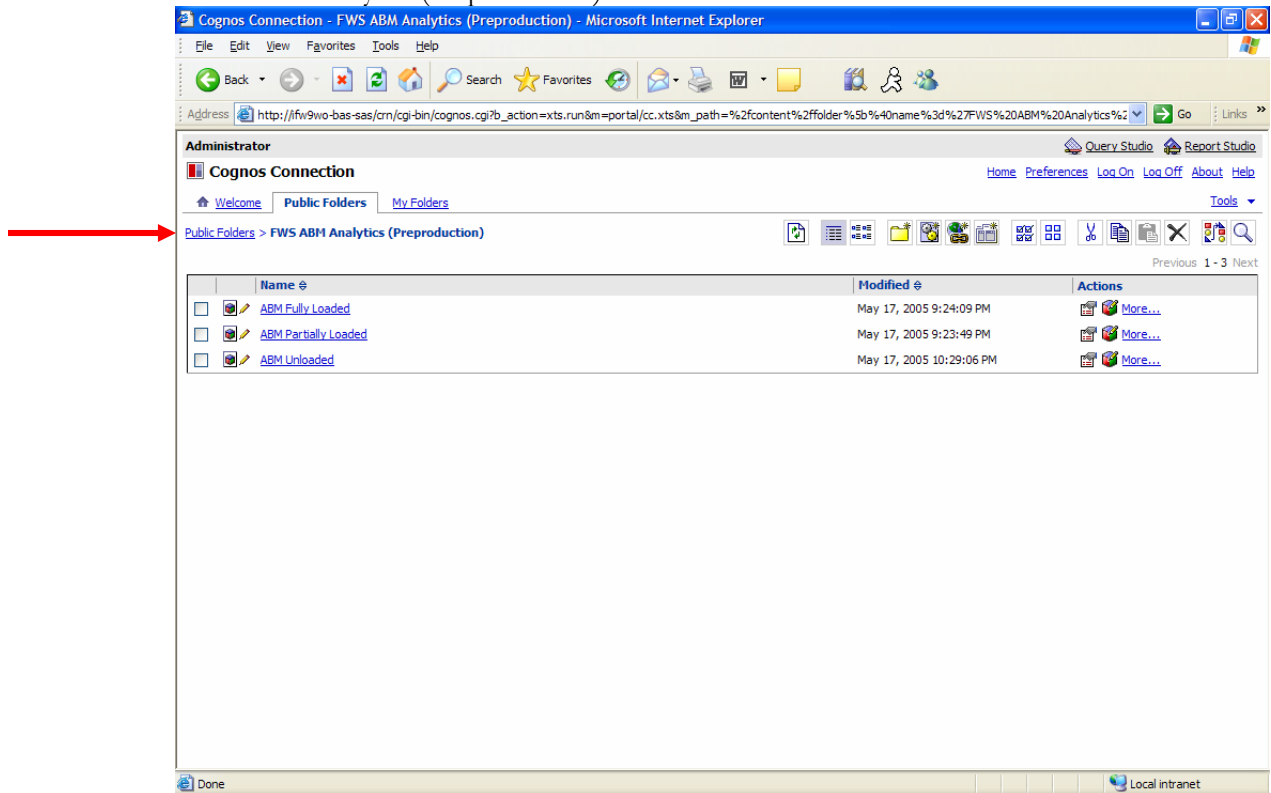


Figure 5 - The PowerPlay data cubes listed in the 'FWS ABM Analytics (Preproduction)' folder.

1. Navigate back to the main 'Public Folders' tab by clicking on the [Public Folders](#) hyperlink
2. Click on the folder labeled 'FWS ABM Analytics (Preproduction)'.

As shown in Figure 5 above, the 'FWS ABM Analytics (Preproduction)' folder contains pointers to the three PowerPlay OLAP cube files; one for each of the three FWS ABC models (see the FY05 Methodology for an explanation of the three ABC models).

To create OLAP views based upon the data in the cube, simply click on the name of cube file. A basic overview of PowerPlay and its functionality is provided in Section **XX**.

3.2 My Folders

My Folders

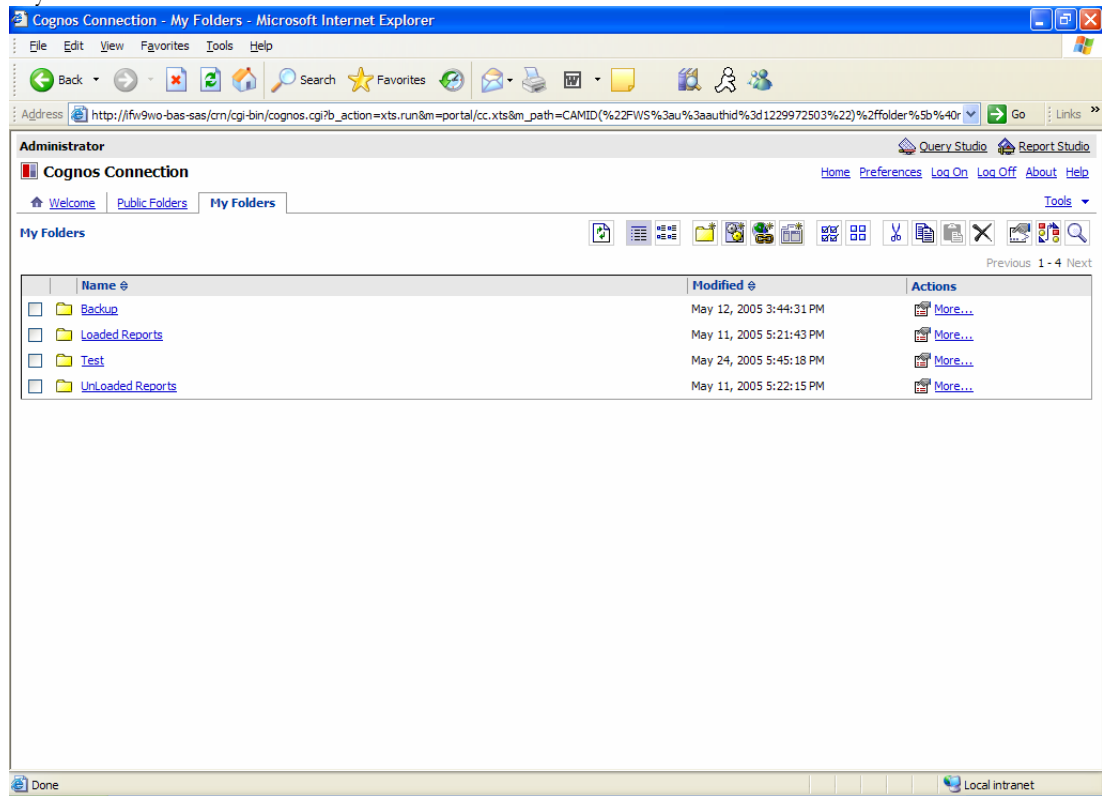


Figure 6 – You may publish reports to the tab labeled ‘My Folders’.

Each FWS end-user has a tab labeled ‘My Folders’. You may publish only those standard reports in which you are interested to your own personal folder section. You may also publish your own ad-hoc reports to this section. ‘My Folders’ is separate and distinct from the public folder domain and it is not accessible to other end-users. You may create new folders and organize reports as needed.

Figure 6 above shows a list of folders, created by the Administrator, in the ‘My Folders’ tab. When you click on the ‘My Folders’ tab, you will not see the Administrator’s folders. It will be empty and ready to use.

Section 4: Report Viewer

4.1 View a Report

Unloaded Model Reports

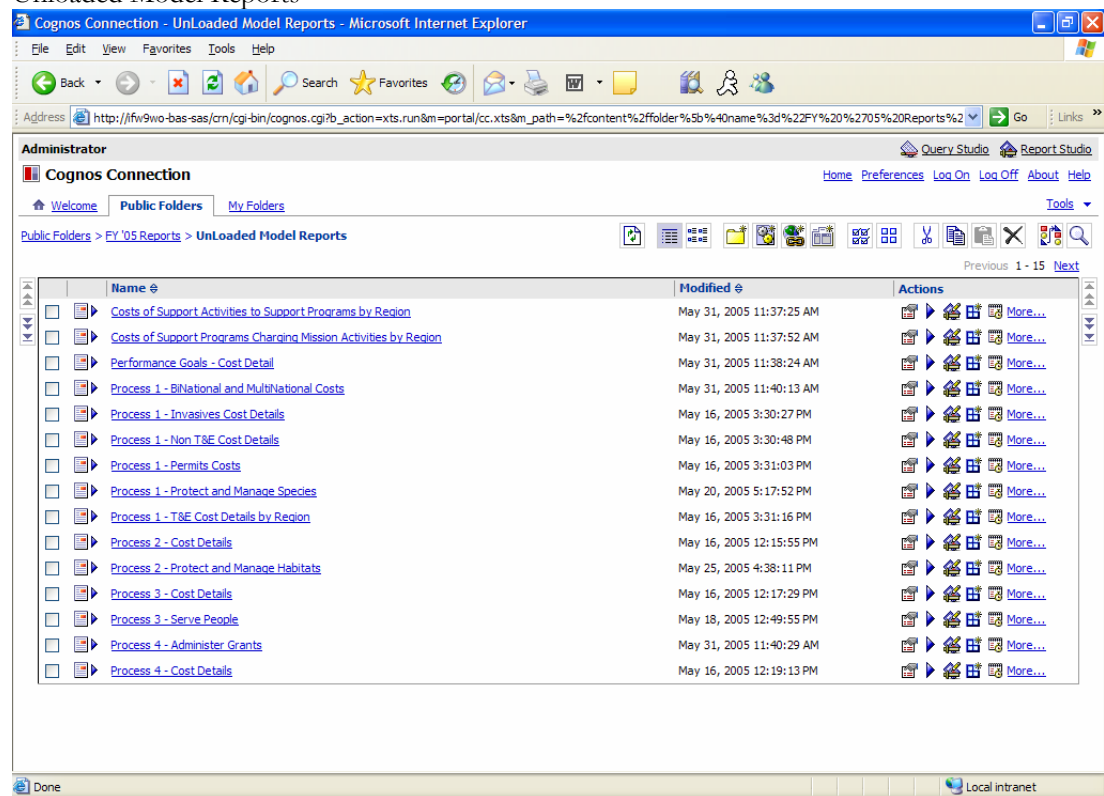


Figure 7 – The list of standard reports in the Unloaded Model Reports folder.

The following steps describe how to open and view a report in the Report Viewer.

1. Click 'Home' to return to the Cognos Connection home page
2. Click on the 'Public Folders' tab
3. Click on the folder labeled 'FY '05 Reports'
4. Click on the folder labeled 'Unloaded Model Reports'
5. Click on the report titled 'Process 3 – Serve People' as seen in Figure 7 above

Fiscal Quarter Filter

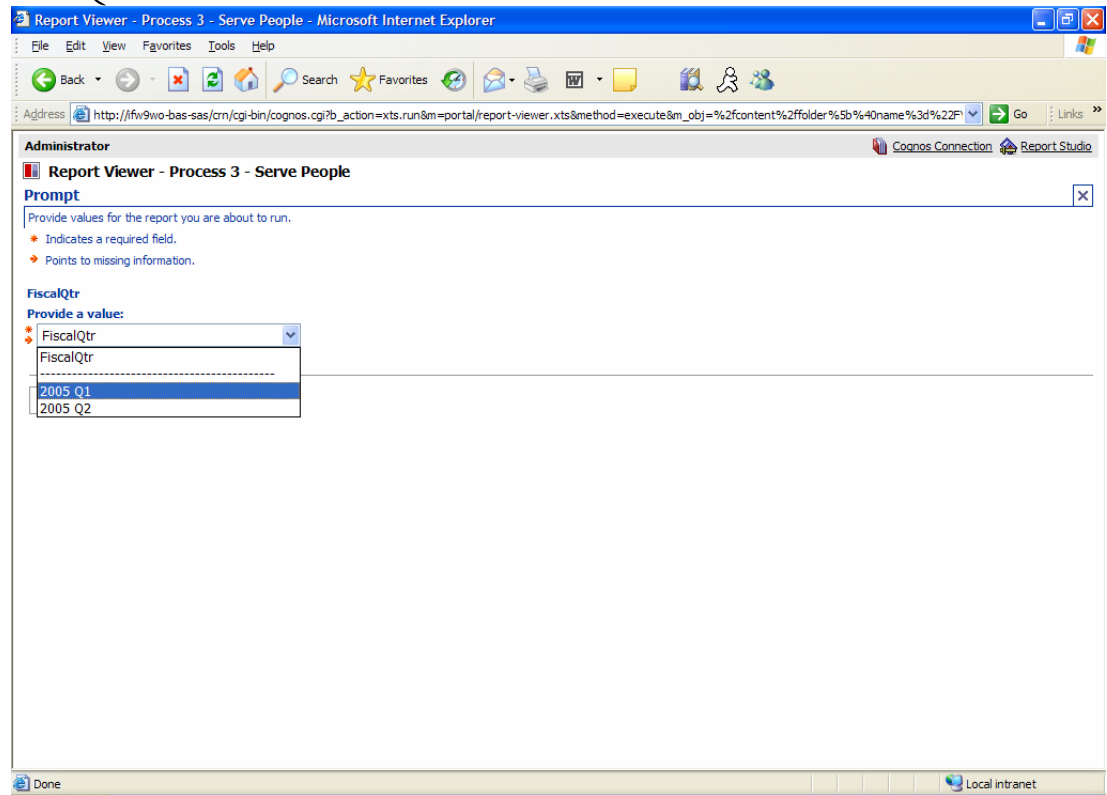


Figure 8 – The Report Viewer requests that you specify the quarter in which data will be used to populate the report.

- Next, from the drop-down list box, select the quarter in which data will be used to populate the report, as shown in Figure 8.
- For this example, select '2005 Q1', then click OK. The screen will display an animated cube and a brief message indicating that it is processing the request.

Report Viewer - Report

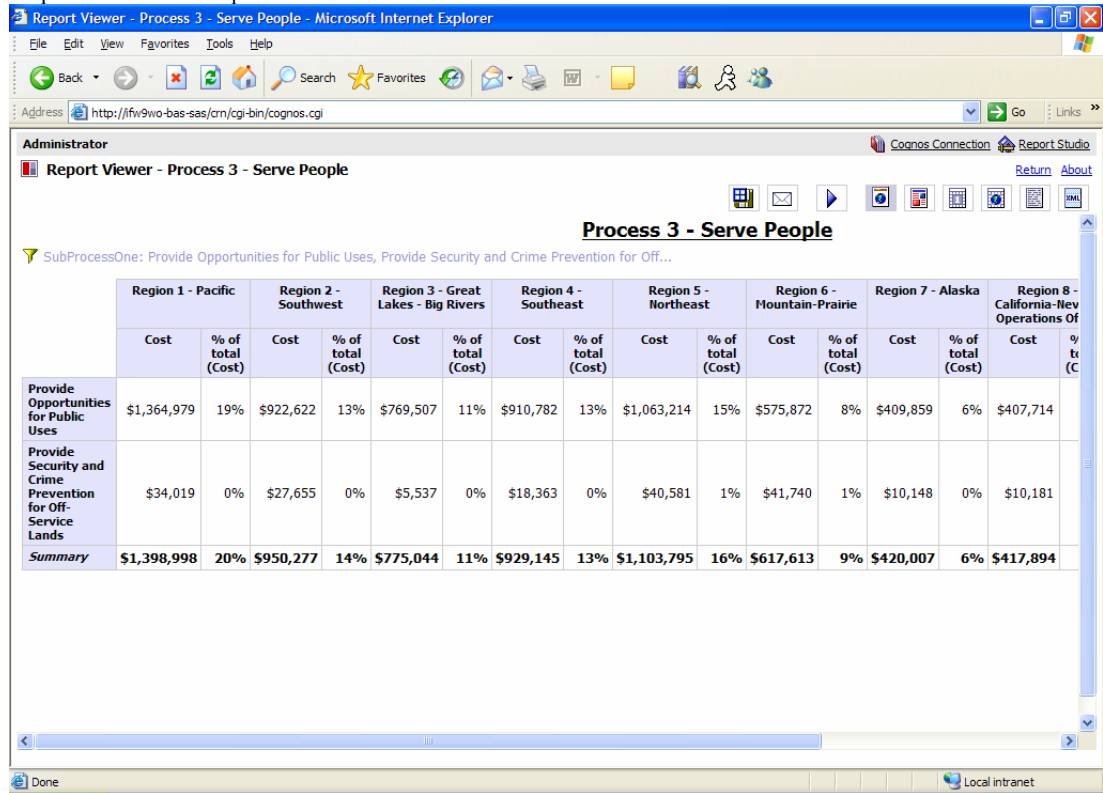


Figure 9 – The final report result displayed in Report Viewer.

The final report will display as shown in Figure 9 above. Often times the report will be too big to view on the screen at one time. You will have to use either the scroll bar on the right or at the bottom of the browser to view the additional data in the report.

4.2 Report Viewer Functionality

The end-user can perform several operations using Report Viewer, such as:

- Save the report as a report view
- Send the report by email
- Run the report
- View the report in PDF format
- View the report in Excel 2000 or 2002 format
- View the report in CSV or XML format

4.2.1 Save the Report

Save the Report

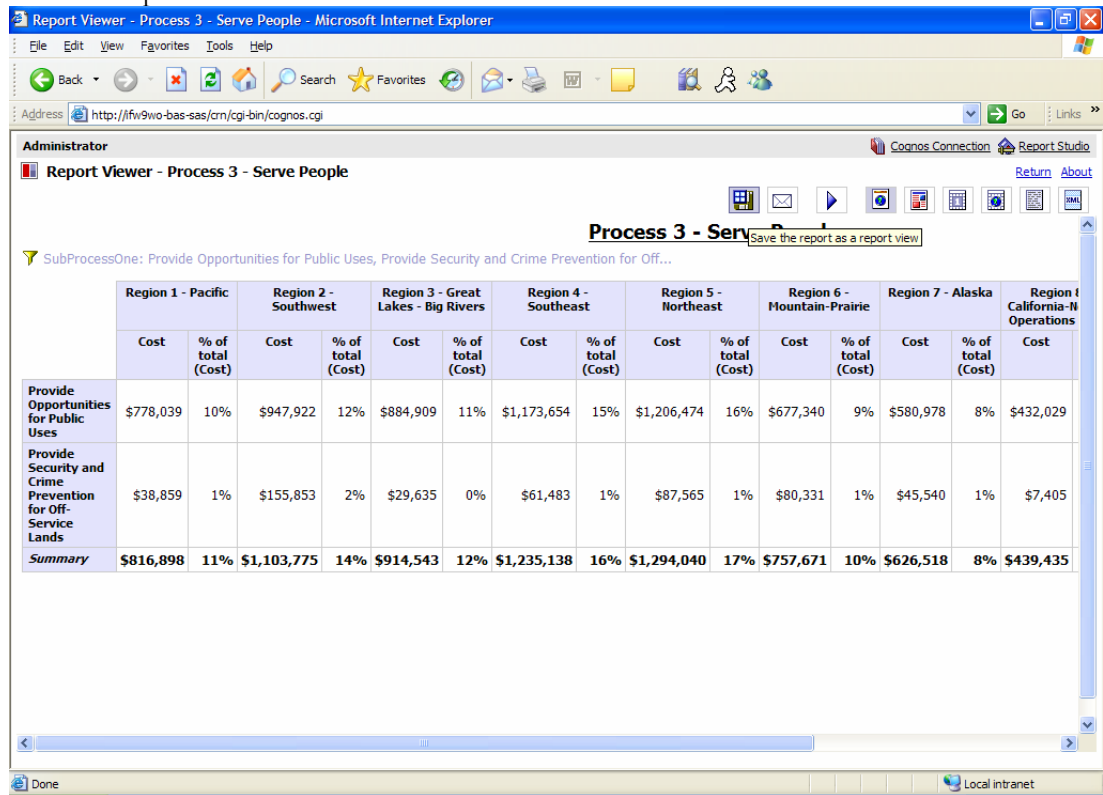


Figure 10 – Report Viewer allows the end-user to save the report.

To save the report as a report view, click the left most toolbar button, as shown in Figure 10.

Save the Report

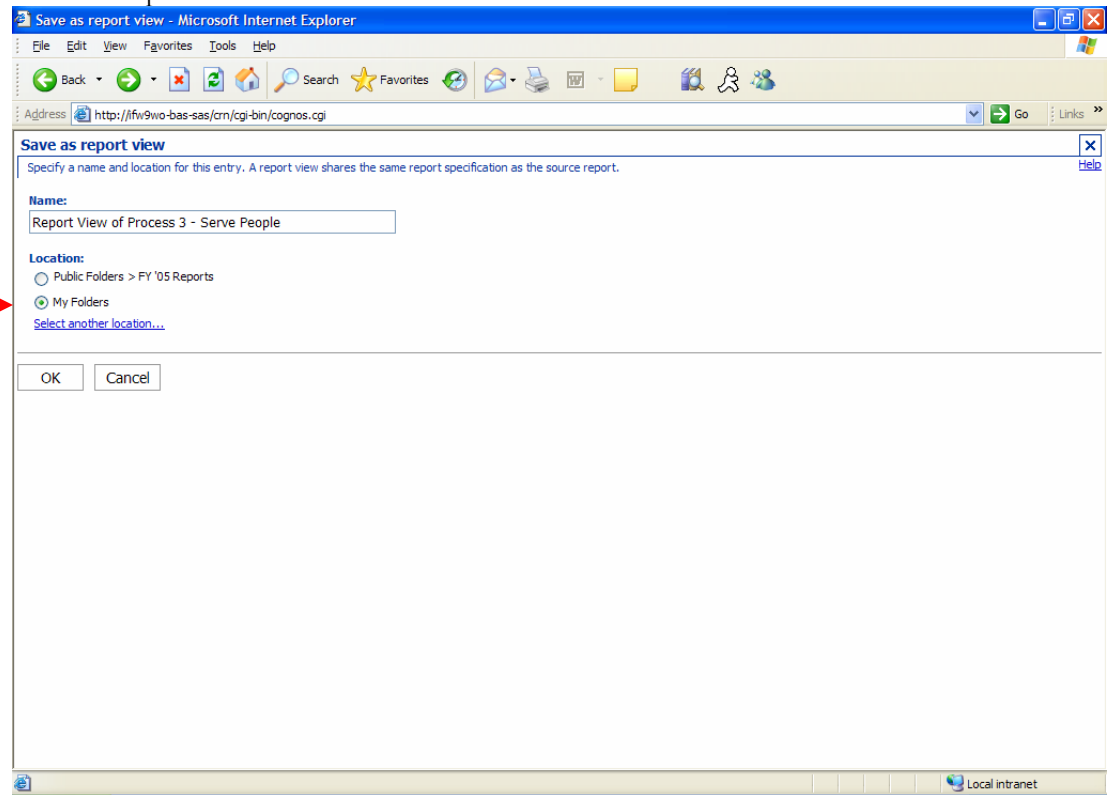


Figure 11 – Specify the location for where you want to save the report.

The Report Viewer will ask you to specify a name and location for the saved report.

1. Click the circle next to 'My Folders'
2. Click OK

If Report Viewer does not send you directly back to 'My Folders,' the next time you navigate to 'My Folders' you will see the saved report listed.

As seen in Figure 11 above, you also have the option of canceling the operation. If you click the 'Cancel' button, the Report Viewer will bring you back to the original report.

4.2.2 Send the Report by Email

Send the Report by Email

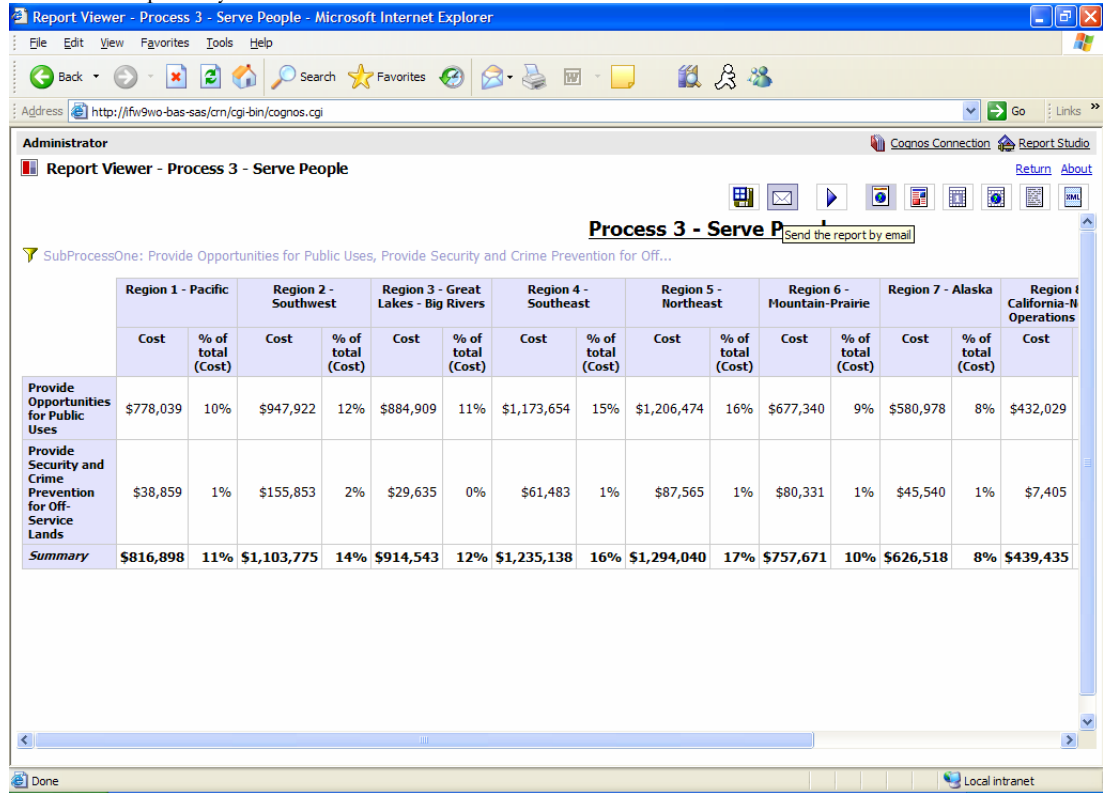


Figure 12 – Report Viewer allows the end-user to send the report via email.

To send the report by email, click the toolbar icon displayed as an ‘envelope,’ as shown in Figure 12 above.

Add Report Recipient(s)

The screenshot shows a Microsoft Internet Explorer browser window with the address bar displaying `http://fw9wo-bas-sas/crm/cgi-bin/cognos.cgi`. The page title is "Set the email options - Process 3 - Serve People". The main content area contains the following form elements:

- To:** A section with a table header "Name" and "Type" and a "No entries" message. Below the table are buttons for "Add...", "Remove", "Select all", and "Deselect all". To the right is a text input field with the instruction "Type the email addresses, separated by semi-colons."
- Subject:** A text input field containing "Report: Process 3 - Serve People".
- Body:** A large text area for entering the email body.
- Attachments:** Two checkboxes: "Include the report" (checked) and "Include a link to the report" (unchecked).
- Buttons for "OK" and "Cancel" at the bottom.

Figure 13 – Specify the recipients and contents of the email. To add recipients, click ‘Add’ to select from existing users, roles, groups, contact and distribution lists or type the email addresses.

1. To include the report in the email, check the box next to ‘Include the report’ and/or if you would like to include a link to the report in the email, check the appropriate box as shown in Figure 13 above.
2. Type your message into the ‘Body’ of the email.
3. Click ‘Add’

Search for Recipient(s)

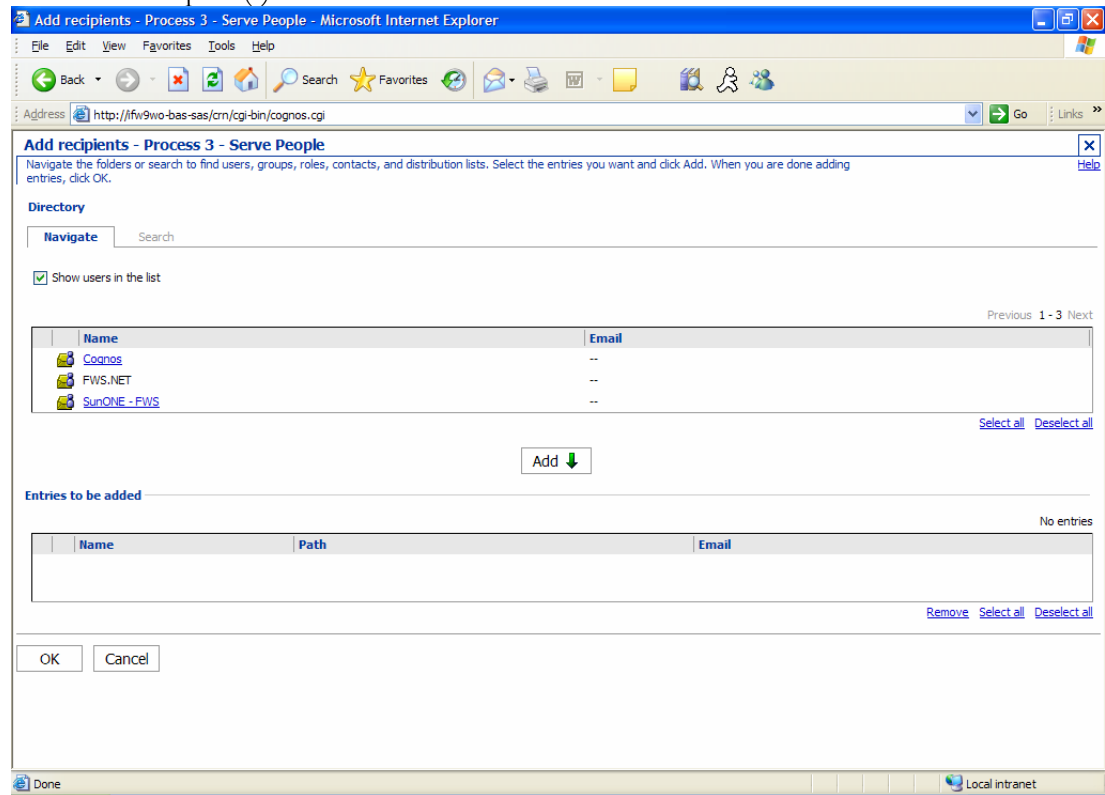


Figure 14 – Navigate the folders or search to find users, groups, roles, contacts, and distribution lists. Select the entries you want and click ‘Add’. When you are done adding entries, click ‘OK’.

4. In this example, click ‘SunONE – FWS’ to locate the recipient of the email. *The SunONE java directory server provides the Cognos application with user security.

Search for Recipient(s)

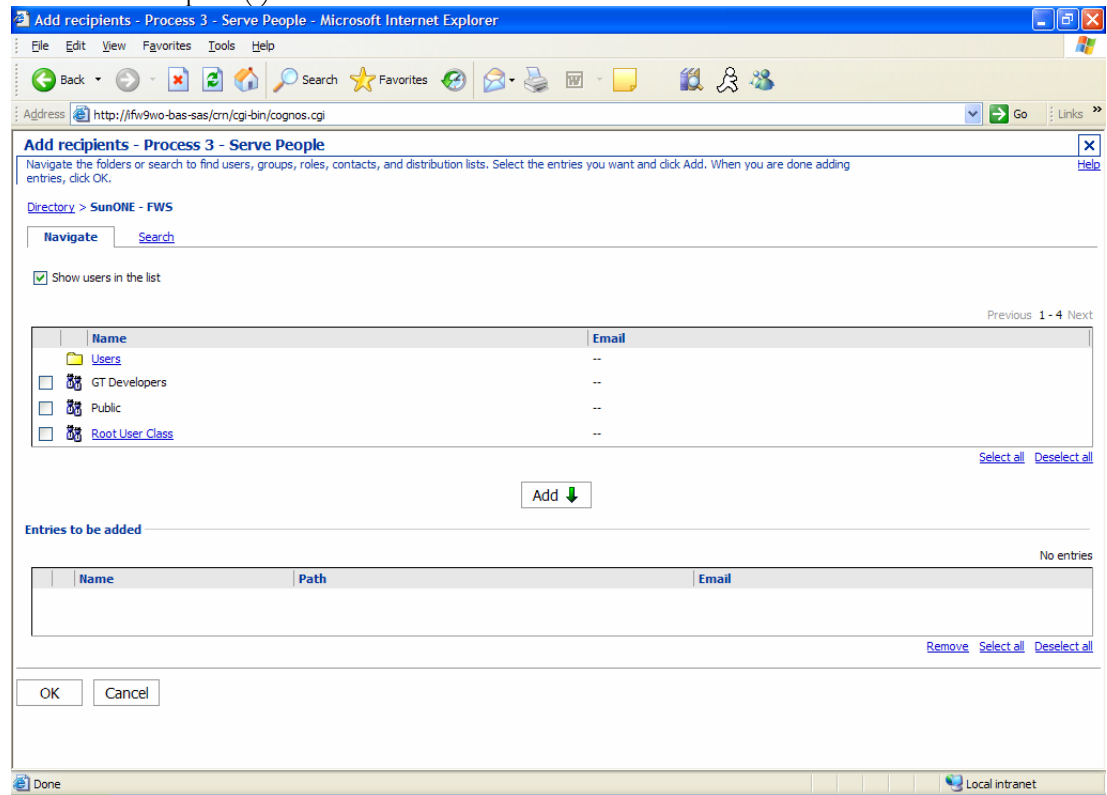


Figure 15 - Navigate the folders or search to find users, groups, roles, contacts, and distribution lists. Select the entries you want and click 'Add'. When you are done adding entries, click 'OK'.

5. Click 'Users,' as shown in Figure 15 above.

Search for Recipient(s)

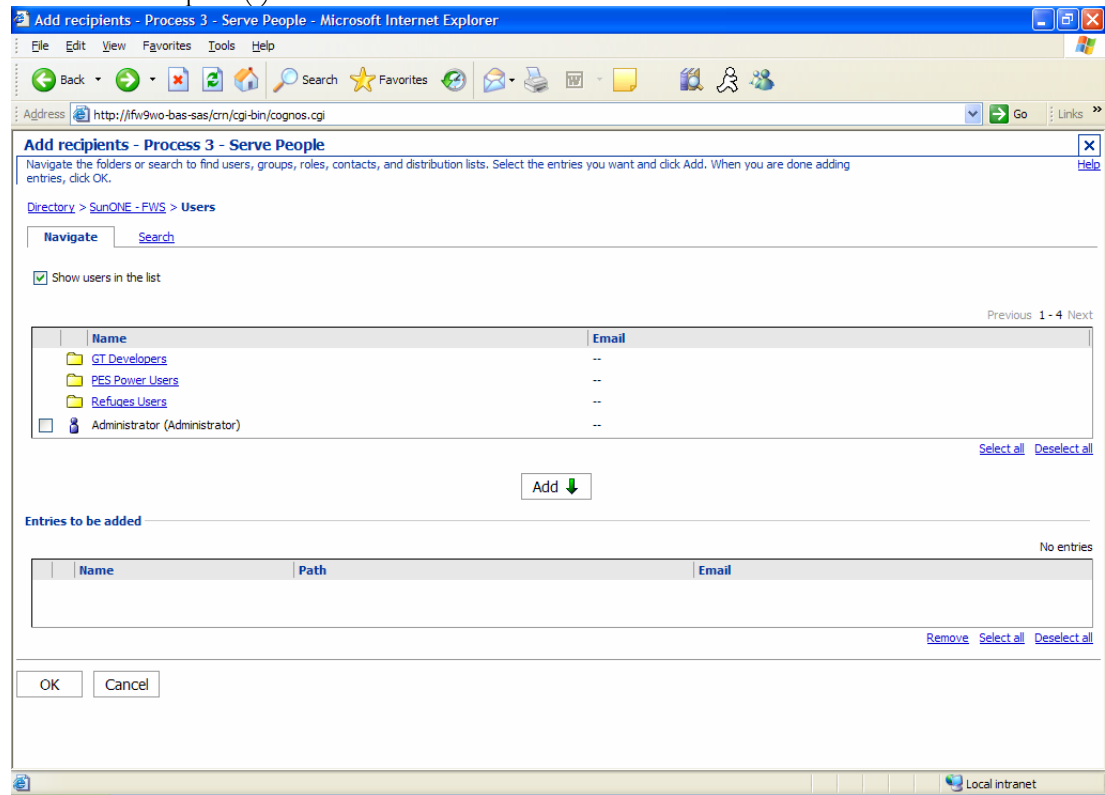


Figure 16 - Navigate the folders or search to find users, groups, roles, contacts, and distribution lists. Select the entries you want and click 'Add'. When you are done adding entries, click 'OK'.

6. Click 'PES Power Users,' as shown in Figure 16 above.

Select Recipient(s)

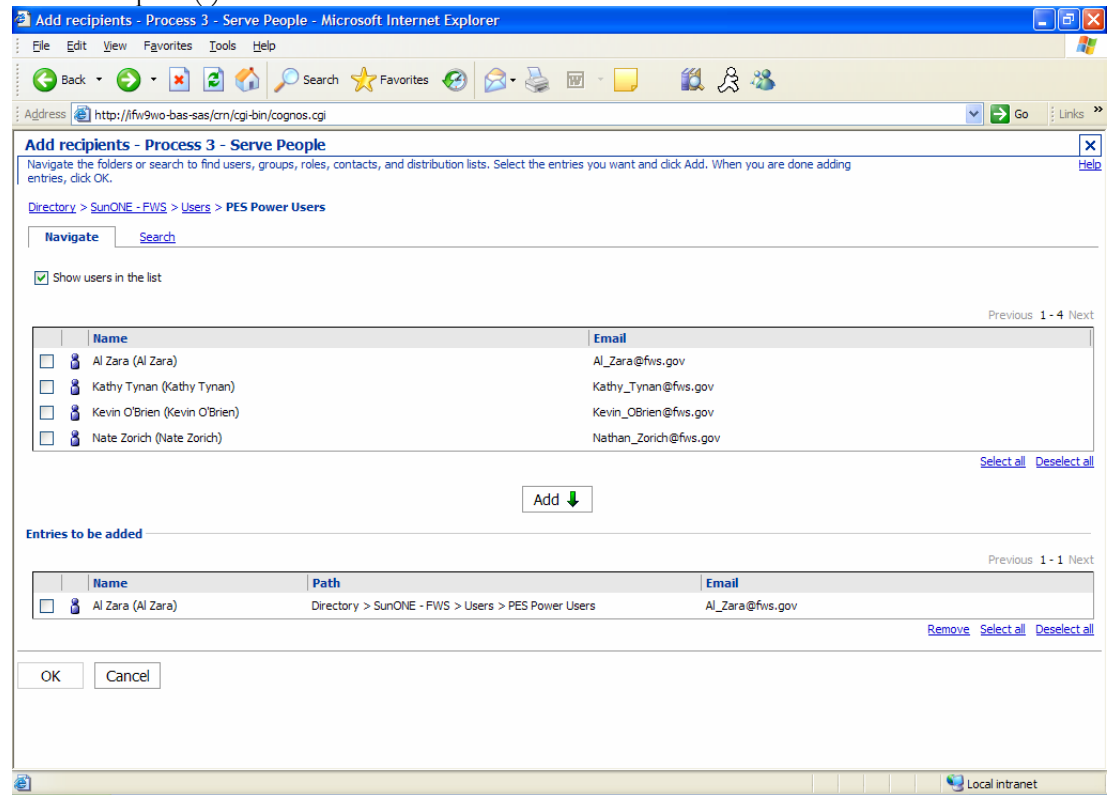


Figure 17 – Select the recipients to be included on the email.

7. Place a check mark in the box next to the name, Al Zara.
8. Click the 'Add' button in the middle of the screen as shown in Figure 17 above. Notice that Al Zara's name and email address appears at the bottom of the screen in the section entitled, 'Entries to be added'.
9. Click OK.

Send the Email to the Recipient(s)

The screenshot shows a web browser window titled "Set the email options - Process 3 - Serve People". The address bar shows the URL "http://fw9wo-bas-sas/crm/cgi-bin/cognos.cgi". The page content includes a title bar, a navigation bar with "File", "Edit", "View", "Favorites", "Tools", and "Help" menus, and a toolbar with icons for Back, Forward, Stop, Home, Search, Favorites, Print, and Mail. The main content area is titled "Set the email options - Process 3 - Serve People" and contains the following form elements:

- To:** A table with columns "Name" and "Type". The table contains one row: "Al Zara" (User). Below the table are links: "Add...", "Remove", "Select all", and "Deselect all". To the right of the table is a text input field with the placeholder "Type the email addresses, separated by semi-colons."
- Subject:** A text input field containing "Report: Process 3 - Serve People".
- Body:** A large text area for composing the email body.
- Attachments:** Two checkboxes: "Include the report" (checked) and "Include a link to the report" (unchecked).
- Buttons:** "OK" and "Cancel" buttons at the bottom of the form.

The browser's status bar at the bottom shows "Done" and "Local intranet".

Figure 18 – Send the email to the recipient(s).

For this example, **do not** click OK! Otherwise, Mr. Al Zara would receive several unwanted emails. In a non-training environment, when want to send this email to the recipient(s), you would click OK.

10. During this training session, click 'Cancel'.

You will return to the original report result displayed in Report Viewer.

4.2.3 Run the Report

Run the Report

Figure 19 – Run the report again specifying a different fiscal quarter.

To run the report again, click on the toolbar icon displayed as a ‘play arrow’ as shown in Figure 19 above.

Specify a Fiscal Quarter

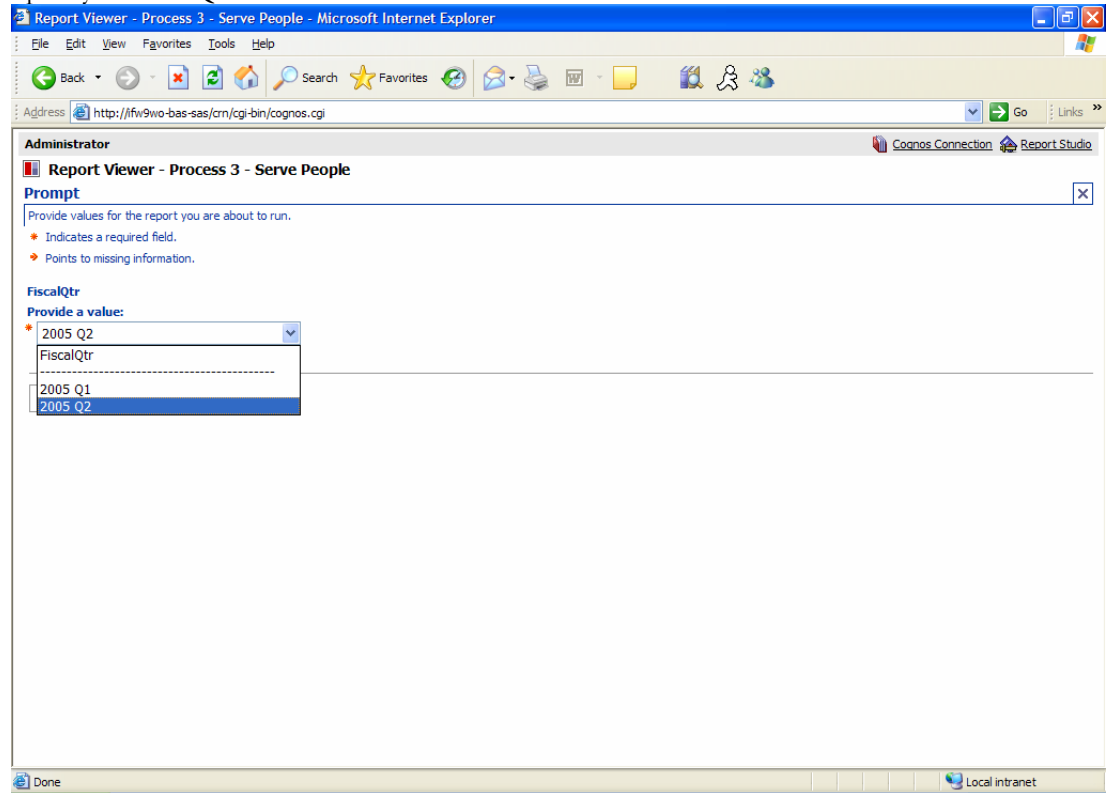


Figure 20 – Select a different fiscal quarter from which the original report was generated.

1. Select '2005 Q2' from the drop-down list box as shown in Figure 20 above.
2. Click OK. The screen will display an animated cube and a brief message indicating that it is processing the request.

The resulting report will display in the Report Viewer.

4.2.4 View the Report in PDF Format

View PDF Report

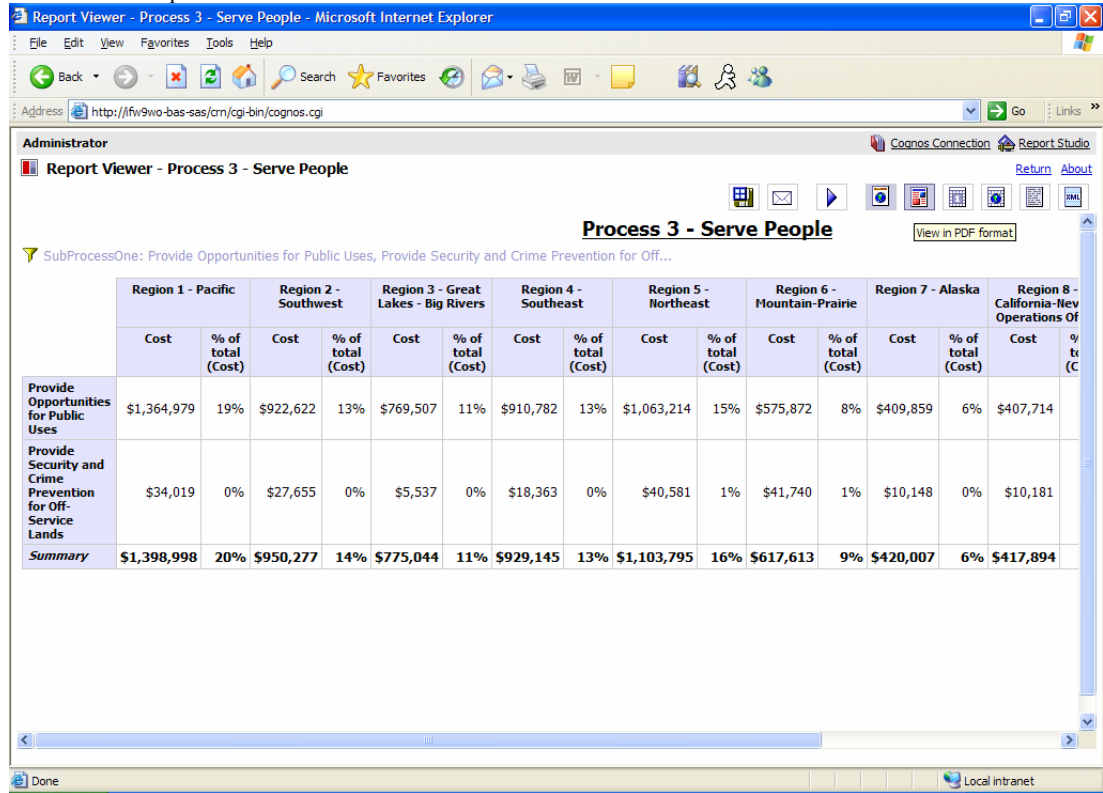


Figure 21 – The Report Viewer allows the end-user to view the report in a PDF format.

To view the report in a PDF format, click on the middle toolbar icon as shown in Figure 21 above.

PDF Format

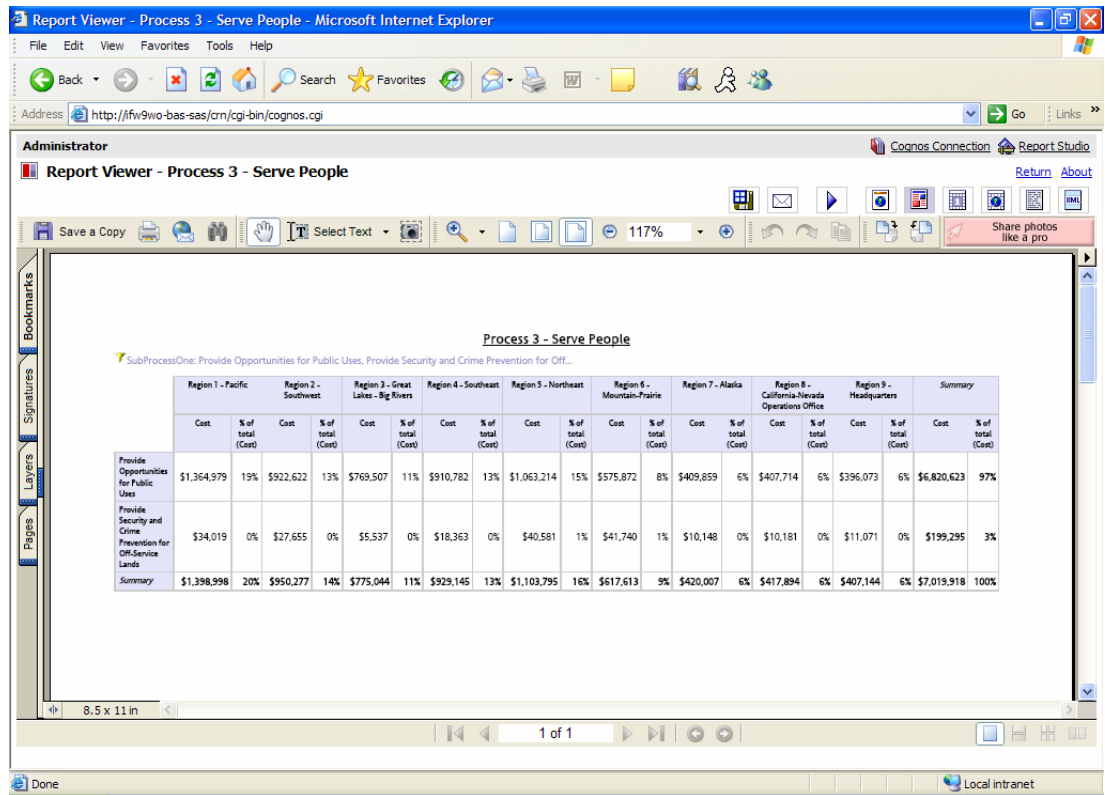


Figure 22 - The Report Viewer opens Adobe Acrobat within the application.

The Report Viewer will initiate the Adobe Acrobat Reader application. The report will display in PDF format within the framework of Report Viewer. It will not open a separate window. You may then use the functionality of Adobe Acrobat to scroll through the report.

4.2.5 View the Report in Excel 2000 or 2002 format

View the Report in Excel

The screenshot shows a web browser window titled "Report Viewer - Process 3 - Serve People - Microsoft Internet Explorer". The address bar shows the URL: <http://fw9wo-bas-sas/crn/cgi-bin/cognos.cgi>. The page content includes a toolbar with icons for printing, email, and exporting to Excel 2000 or 2002 format. Below the toolbar is a table with columns for eight regions and a summary row, showing cost and percentage of total cost for two sub-processes.

	Region 1 - Pacific		Region 2 - Southwest		Region 3 - Great Lakes - Big Rivers		Region 4 - Southeast		Region 5 - Northeast		Region 6 - Mountain-Prairie		Region 7 - Alaska		Region 8 - California-N Operations
	Cost	% of total (Cost)	Cost	% of total (Cost)	Cost	% of total (Cost)	Cost	% of total (Cost)	Cost	% of total (Cost)	Cost	% of total (Cost)	Cost	% of total (Cost)	Cost
Provide Opportunities for Public Uses	\$778,039	10%	\$947,922	12%	\$884,909	11%	\$1,173,654	15%	\$1,206,474	16%	\$677,340	9%	\$580,978	8%	\$432,029
Provide Security and Crime Prevention for Off-Service Lands	\$38,859	1%	\$155,853	2%	\$29,635	0%	\$61,483	1%	\$87,565	1%	\$80,331	1%	\$45,540	1%	\$7,405
Summary	\$816,898	11%	\$1,103,775	14%	\$914,543	12%	\$1,235,138	16%	\$1,294,040	17%	\$757,671	10%	\$626,518	8%	\$439,435

Figure 23 – The Report Viewer allows the end-user to view the report in Excel.

To view the report in Excel 2000 or 2002, click on either of the toolbar icons, respectively, at the top of the screen as shown in Figure 23 above.

Open or Save Excel File

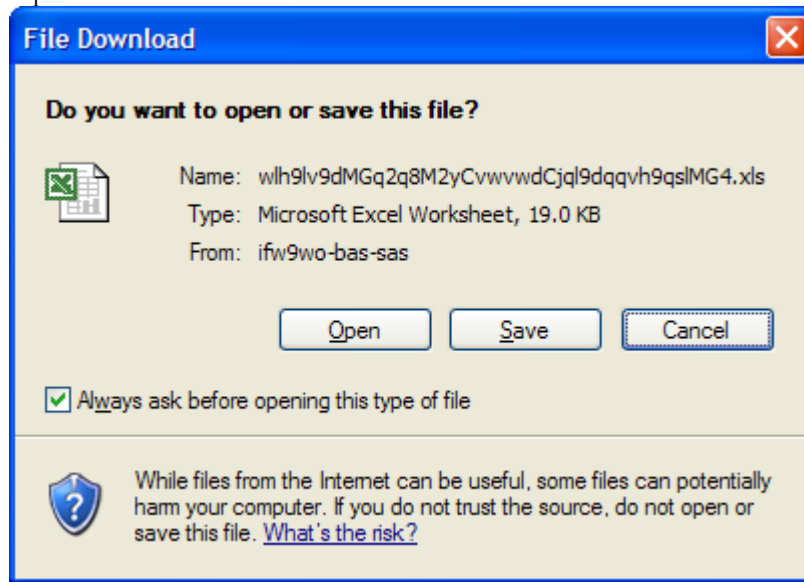


Figure 24 – Choose to either open the Excel file in a new window or save the file to your hard drive.

Report in Excel Format

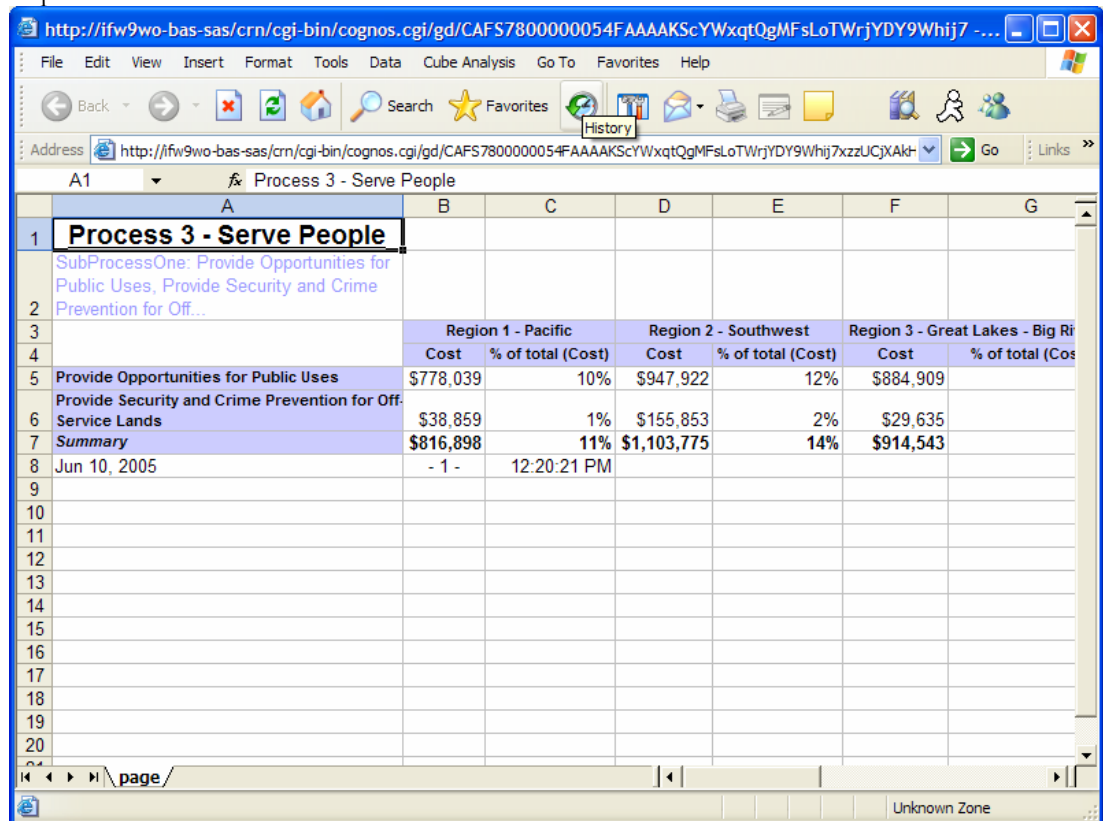


Figure 25 – The Report Viewer will initiate the Excel application in a new window. You may use Excel’s functionality to further format the report.

4.2.6 View the Report in CSV or XML Format

Error Message – CSV or XML Format

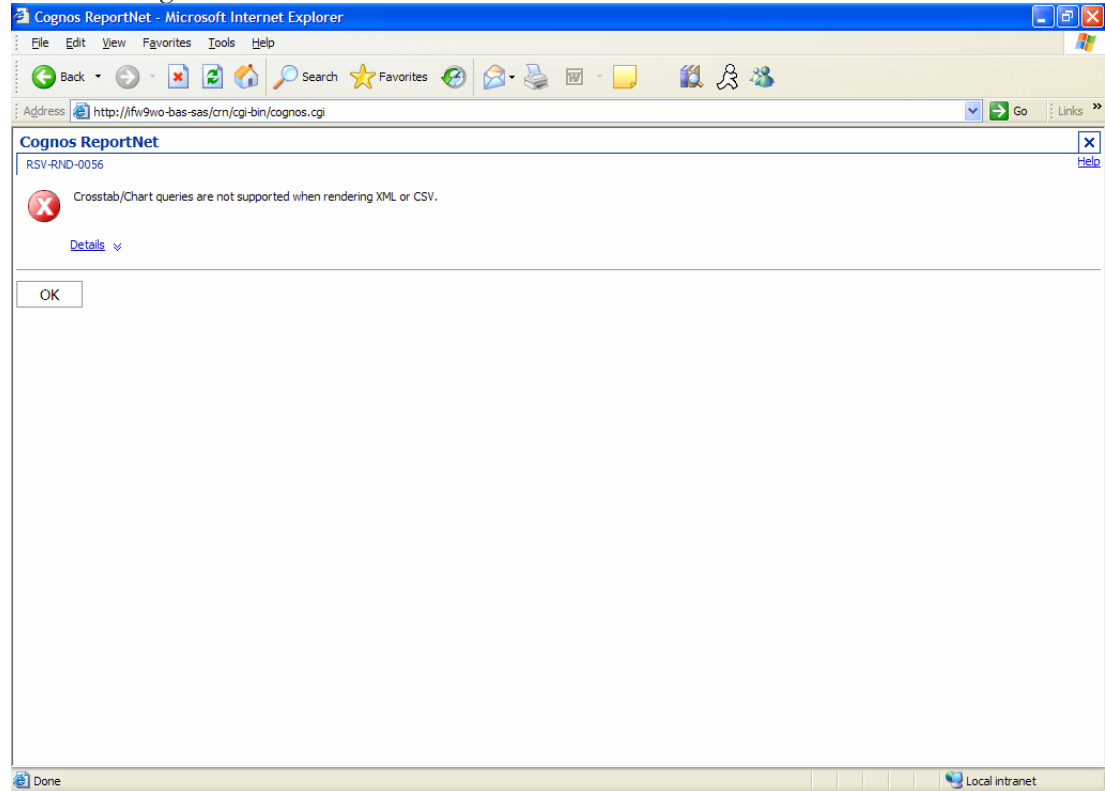


Figure 26 – When attempting to view the report in either CSV or XML format, the Report Viewer will display an error message.

If you click on either one of the last two icons in the Report Viewer toolbar (refer to Figure 23) in an attempt to view the report in either CSV or XML formats, the error message shown in Figure 26 above will display. The standard reports located in 'Public Folders' are 'cross-tab' reports. As described in the error message, Crosstab/Chart queries are not supported when rendering CSV or XML.

For your purposes, there's no need to view the available standard reports in CSV or XML format. The Excel and PDF formats will suffice for further reporting and data analysis.

Section 5: Query Studio

5.1 Introduction

As part of the Cognos application suite, Query Studio enables the end-user to create simple customized queries. As an end-user, you may want to view information that does not already exist as a standard report previously created by the FWS ABC project team. Use Query Studio to create, publish, and organize personal queries within 'My Folders'.

In order to use Query Studio, you must first understand the database table structure in order to select the appropriate information into the query. The FWS ABC project team developed a 'business view' of the database to help you better recognize the available data and make it easier overall to create queries.

This section explains the 'FWS Business View' of model data and, like previous sections, provides screen shots and step-by-step instruction on how to create a query and use basic Query Studio functionality.

5.2 The FWS Business View

The tables maintained in the FWS Business View are visible once Query Studio is accessed. The following is a description of the tables and fields included in the business view. Immediately following this section is an overview of how to open Query Studio and access the business view as well as step-by-step instruction on how to create a query.

5.2.1 Fiscal Quarter

Description: The table labeled 'Fiscal Quarter' represents the fiscal quarter of FWS ABC data. For example: '2005 Q1' means October 1st thru December 31st of 2005.

5.2.2 Region

Description: The table labeled 'Region' includes all regions in FWS. The following fields are available to select from the table:

- Region – The number associated with the region
- Region Name – The name of the region
- Region Display Name – The Region and Region Name concatenated together

5.2.3 Program

Description: The table labeled 'Program' includes all programs designated by FWS Headquarters. The following fields are available to select from the table:

- Program Name – The full name of the program
- Short Program Name – The short (abbreviated) name of the program
- Program Type – Indicates whether the program is of type 'Mission' or 'Support'

5.2.4 Organization

Description: The table labeled 'Organization' incorporates all 5-digit organization codes and organization names present in FFS, except for those organization codes like "XXFXX". *Codes of this type are accounts for regional FFS and FLT coordinators, costs that FWS does not wish to include in the model. This table allows for analysis based upon specific organizations. The following fields are available to select from the table:

- Organization Code – The 5-digit organization code
- Organization Name – The full name of the organization code
- Organization (Code and Name) – The Org Code and Org Name concatenated together
- Organization Office – The office to which the organization belongs
- Organization Office (abbreviation) – The abbreviation of the Organization Office
- Office Type – The office type, 'Field Office' or 'Regional Office'
- Organization Type – Indicates whether the org is of type 'Mission' or 'Support'

5.2.5 Cost Category

Description: The table labeled 'Cost Category' specifies if the cost is labor or non-labor related. The following field is available to select from the table:

- Resource Type – Specifies whether or not the cost is related to labor or non-labor resources, or if the type is 'Unknown'

5.2.6 Employee

Description: The table labeled 'Employee' maintains information related to each employee listed in FPPS for that fiscal quarter. The following fields are available to select from the table:

- Full Name – The full name of the employee
- First Name – The first name of the employee
- Last Name – The last name of the employee
- Pay Grade – The employee's pay grade
- Job Series – The employee's job series
- Employee Status – The employee's status, ie: 'Active,' 'Inactive,' 'LWOP'

5.2.7 Budget Object Class (BOC)

Description: The table labeled 'Budget Object Class (BOC)' maintains BOC related information. The following fields are available to select from the table:

- BOC Code – The 4-digit code tied to each transaction in the GL
- BOC Name – The full name of the BOC
- BOC Series – The 4-digit 'rollup' code to the BOC code

5.2.8 Subactivity

Description: The table labeled 'Subactivity' maintains subactivity related information. The following fields are available to select from the table:

- Subactivity Code – The 4-digit subactivity code
- Subactivity Name – The full name of the subactivity
- Subactivity 'Rollup' Code – The 4-digit 'rollup' code for the subactivity
- Subactivity 'Rollup' Name – The full name of the subactivity rollup
- Subactivity Program Type – The subactivity type, 'Mission' or 'Support'

5.2.9 Activity

Description: The table labeled 'Activity' includes the 186 standard work activities identified by FWS personnel as well as the entire hierarchy as it is structured in SAS ABM for FY2005 Q1 and Q2 model data. The following fields are available to select from the table:

- Core Process – The core process is the top-most level of the activity hierarchy
- SubProcess One – The child process of the core process
- SubProcess Two – The child process of subprocess one
- SubProcess Three – The child process of subprocess two
- Work Activity – The FWS standard work activity
- Activity-Program Name (Account Level) – The account level maintained in the hierarchy. It is the 2-digit activity code concatenated to the specific subactivity program area name. This allows you to view activity related costs by program.
- Activity Code – The 2-digit activity code corresponding to the work activity
- Activity Type – The activity type, 'Mission' or 'Support'

5.2.10 Cost Object

Description: The table labeled 'Cost Object' includes the entire hierarchy of Cost Object goals from the FWS critical success factors mapped up to the DOI mission components. The following fields are available to select from the table:

- DOI Mission Component – The DOI mission component

- DOI Strategic Goal – The DOI strategic goal
- DOI End-Outcome Measure – The DOI end-outcome measure
- FWS Operational Goal – The FWS operational goal
- Critical Success Factor (CSF) – Formerly, the Annual Program Goal (APG). The mission related work activities are performed in support of CSFs

5.2.11 Program Name (Activity Module)

Description: The table labeled ‘Program Name (Activity Module)’ maintains separately from the work activity code, the subactivity program name as it is viewed at the account level in SAS ABM FY2005 Q1 and Q2 models. The following fields are available to select from the table:

- Program Name – The program name understood to be associated with each subactivity
- Program Rollup Name – The parent program name. For example, ‘Hatcheries – F’ and ‘Management Assistance – F’ program names roll up to the ‘Fisheries’ program name.
- Program Type – The program type, ‘Mission’ or ‘Support’

5.2.12 State

Description: The table labeled ‘State’ includes state and congressional district attribute information. The following fields are available to select from the table:

- State Code – The 2-digit state code associated with the State Name
- State Name – The state name
- Congressional District – A numeric code representing a congressional district

5.2.13 ABM Loaded Full

Description: The table labeled ‘ABM Loaded Full’ maintains the cost measure for the FWS Fully Loaded Activities model. The mission related work activities are ‘fully loaded’ with support related work activity costs. All organizational support/sustaining activity costs are ‘fully loaded’ into mission delivery activities, rather than showing them in the two support categories as in the Unloaded Activities model.

- Loaded Cost

5.2.14 ABM Loaded Partial

Description: The table labeled ‘ABM Loaded Partial’ maintains the cost measure for the FWS Partially Loaded Activities model. This model represents the first stage of a two stage activity allocation and full activity costs at the budget subactivity level (e.g., costs are shown for “Hatcheries” and “Management Assistance” vs. for “Fisheries”). Costs from “mission subactivities charging to organizational support/sustaining activities” have been allocated or loaded to “mission subactivities charging to mission delivery activities”.

- Loaded Partial Cost

5.2.15 ABM Unloaded

Description: The table labeled ‘ABM Unloaded’ maintains the cost measure for the FWS Unloaded Activities model. This model represents activity costs directly from FFS and prior to any activity cost allocations or loading. All organizational support/sustaining activity costs are shown independent of mission delivery activities in two categories: Support Orgs Charging Support Activities and Support Orgs Charging Mission Activities.

- Unloaded Cost

5.3 Access Query Studio

Cognos Connection - Home Page

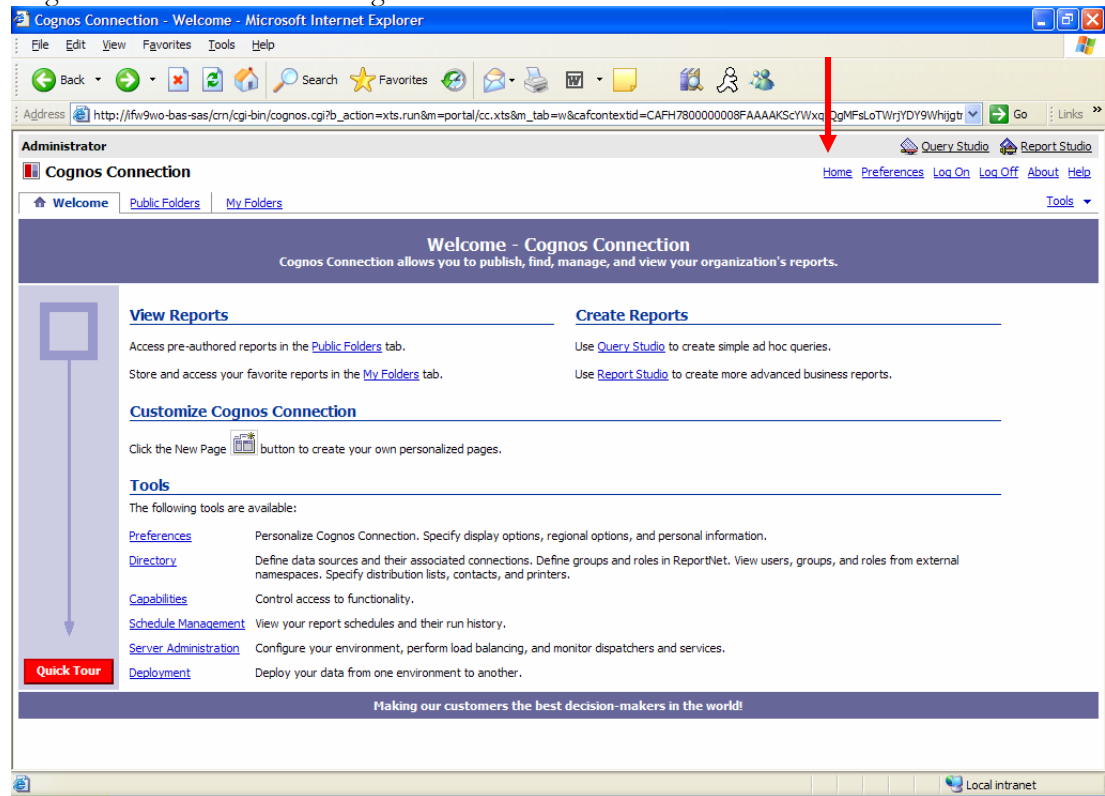


Figure 27 – Return to the Cognos Connection home page and click on the link to Query Studio.

In order to access Query Studio:

1. Click on either 'Home' or 'Return' depending on where you are within the Cognos application to return to the Cognos Connection – Home Page.
2. Click on the link labeled Query Studio.

FWS Business View Package

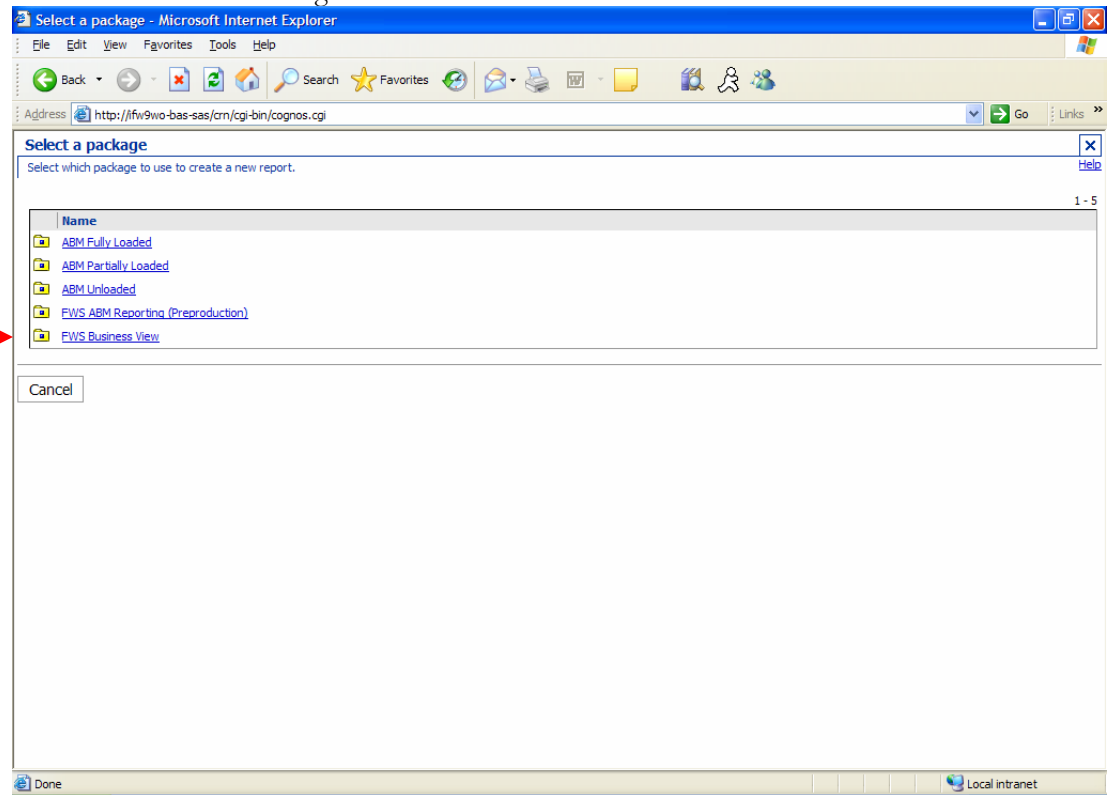


Figure 28 – Select the ‘FWS Business View’ package to create a new report in Query Studio.

3. Click on the package folder labeled ‘FWS Business View’

Query Studio

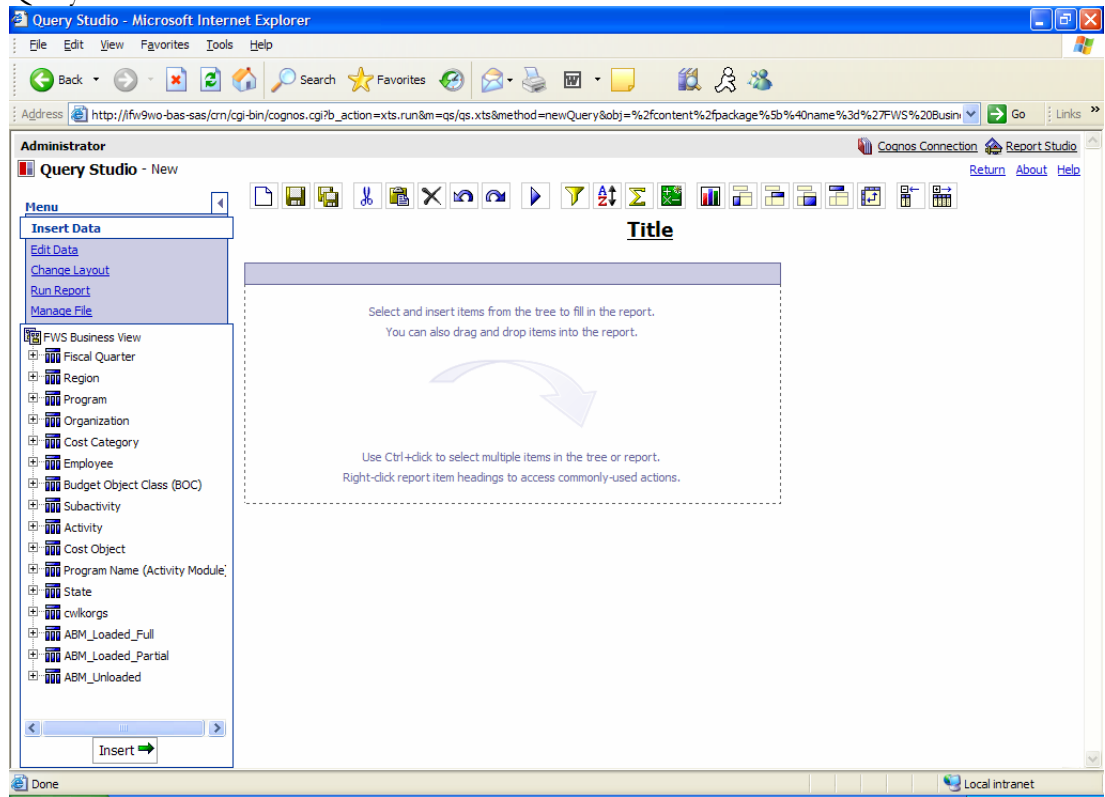


Figure 29 – The administrator’s view of Query Studio.

After you have selected the ‘FWS Business View’ package, Query Studio will open with the business view expanded on the left-hand side of the screen as shown in Figure 29 above. At this point, you may begin to create and save your own queries.

5.4 Create a Query

The following is step-by-step instruction on how to create a query using the business view package. After you create the query, we will step through how to use basic Query Studio functionality to filter on specific criteria and format the query.

In this exercise, we will create a query using the following criteria from the business view:

- Fiscal Quarter
- Region Display Name
- Core Process
- Work Activity
- Program Type
- Program Name
- Loaded Partial Cost

Create a Query – Fiscal Quarter

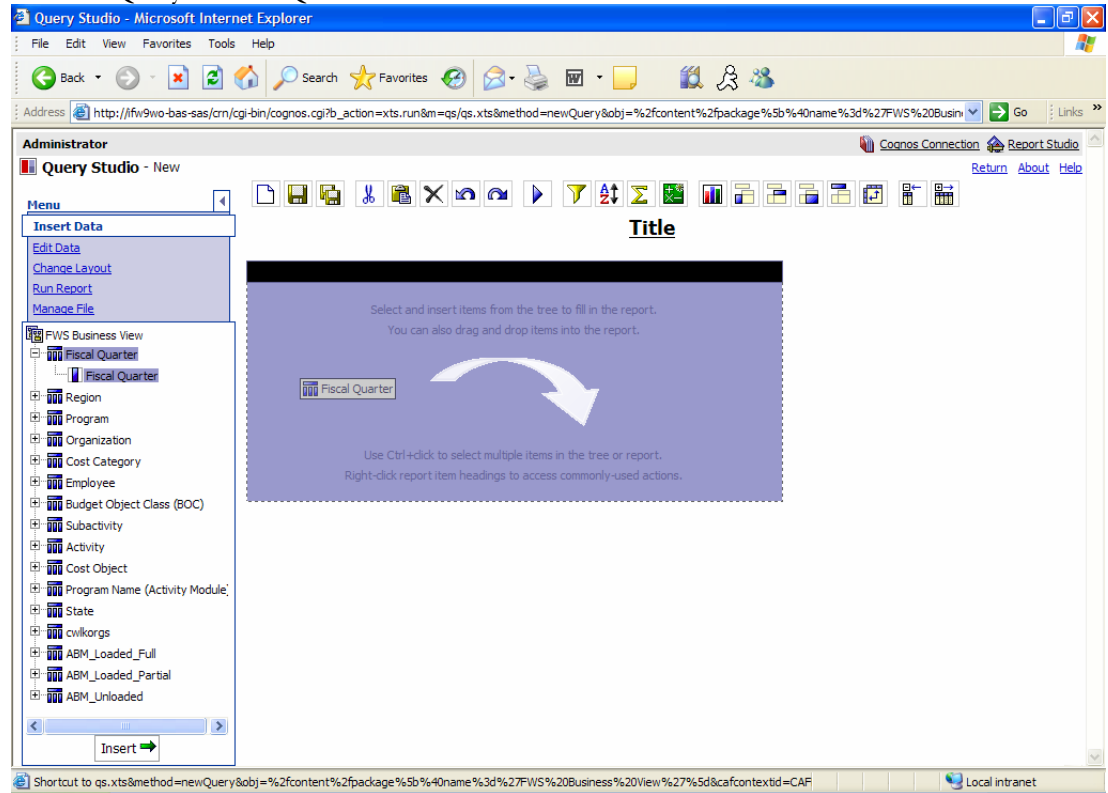


Figure 30 – Select ‘Fiscal Quarter’ from the business view.

1. Click the plus sign to expand the ‘Fiscal Quarter’ table in the business view.
2. Drag and drop the ‘Fiscal Quarter’ field into the middle of the screen as shown in Figure 30 above.

Create a Query – Fiscal Quarter

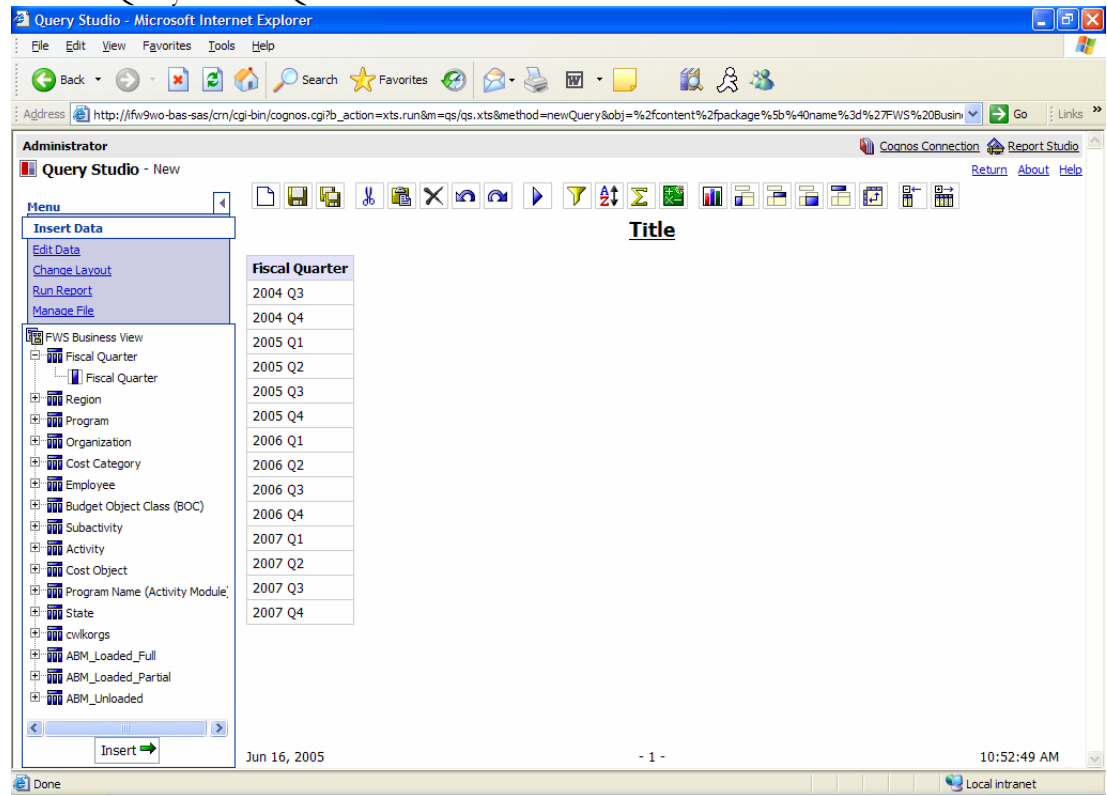


Figure 31 – ‘Fiscal Quarter’ displayed in the query after dragging and dropping.

The fiscal quarter will display in the query as shown in Figure 31 above. Proceed to click and drag the remainder of the criteria needed for this query into the middle of the screen just to the right of the fiscal quarter.

Create a Query – Region Display Name

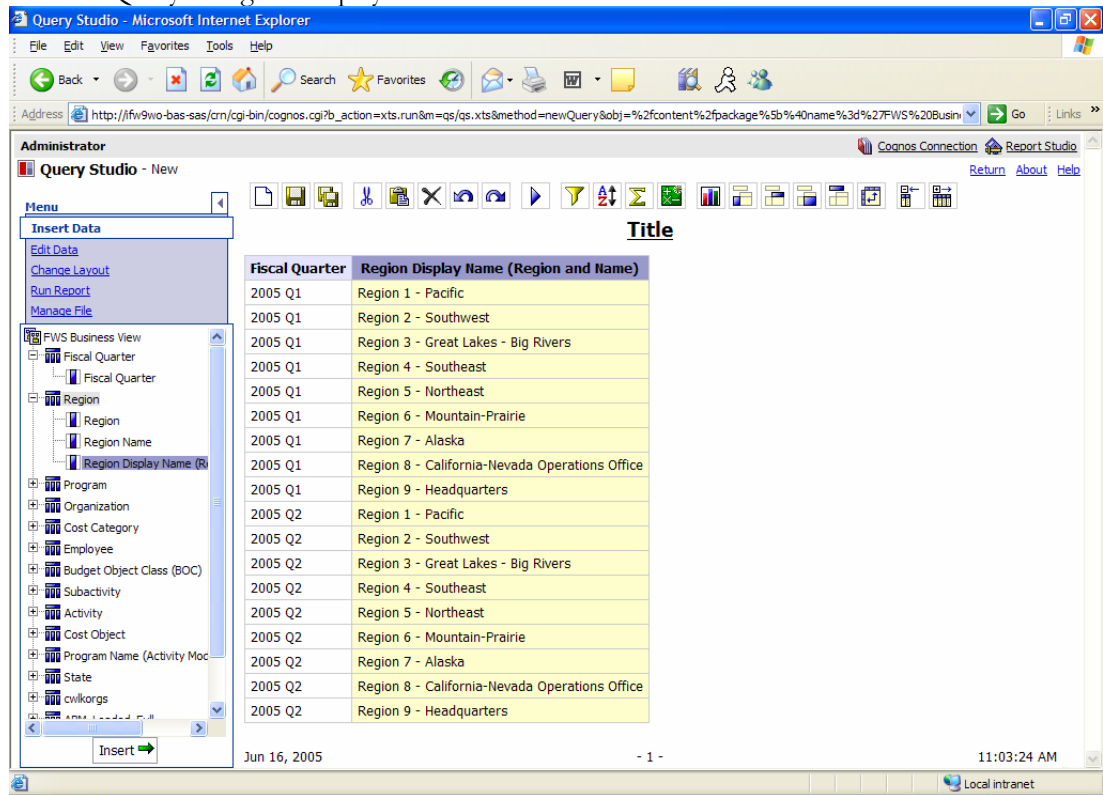


Figure 32 - 'Region Display Name' displayed in the query after dragging and dropping.

3. Click the plus sign to expand the 'Region' table in the business view.
4. Drag and drop the 'Region Display Name' field into the middle of the screen to the right of the fiscal quarter column.

Create a Query – Core Process

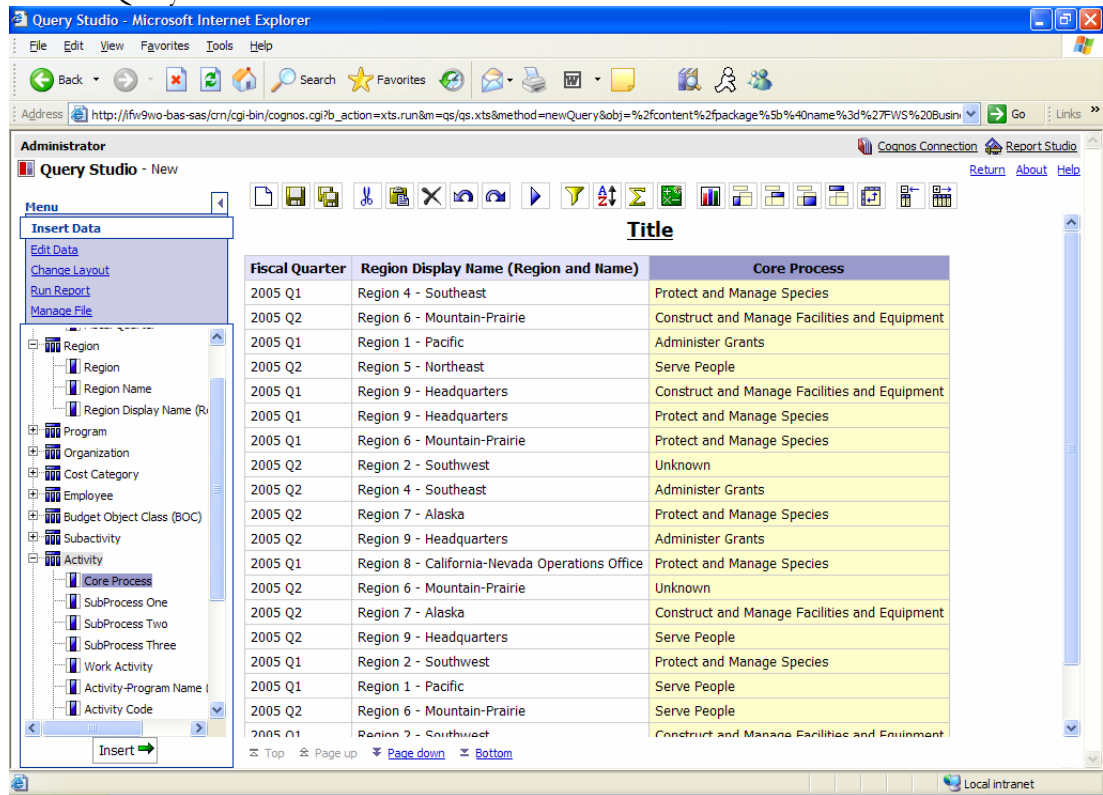


Figure 33 - 'Core Process' displayed in the query after dragging and dropping.

5. Click the plus sign to expand the 'Activity' table in the business view.
6. Drag and drop the 'Core Process' field into the middle of the screen to the right of the Region Display Name column.

Create a Query – Work Activity

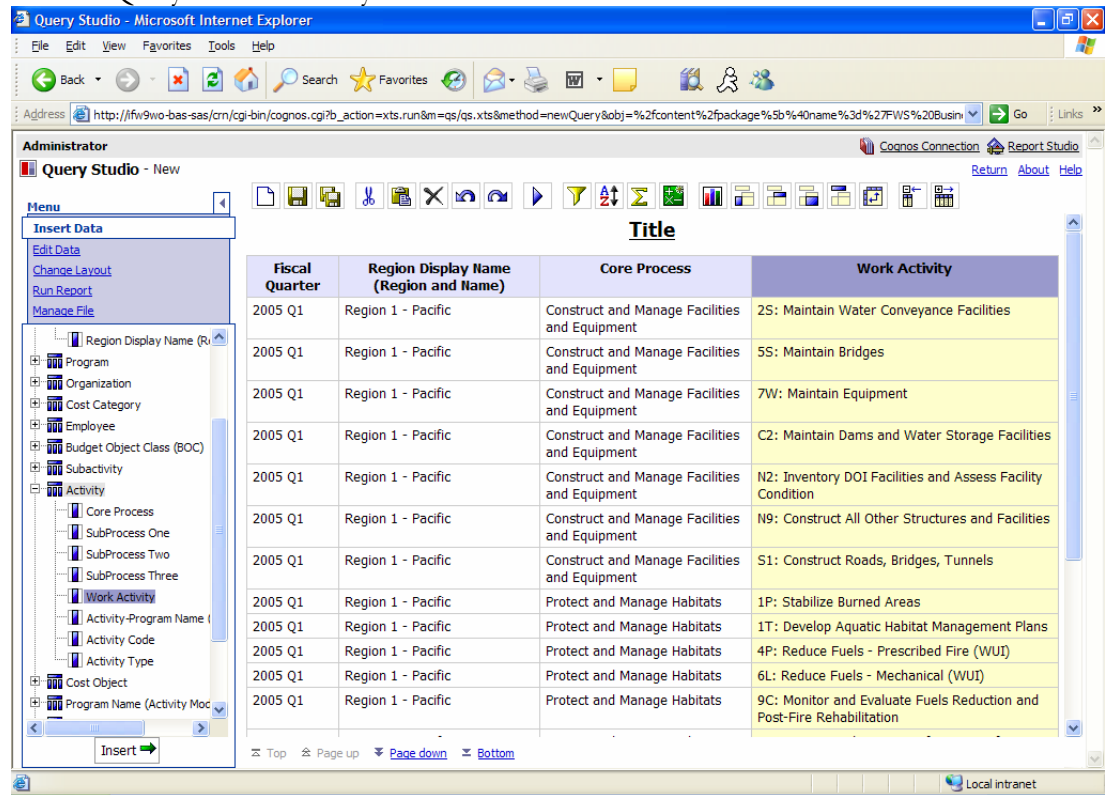


Figure 34 - 'Work Activity' displayed in the query after dragging and dropping.

7. Drag and drop the 'Work Activity' field into the middle of the screen to the right of the Core Process column.

Create a Query – Program Type

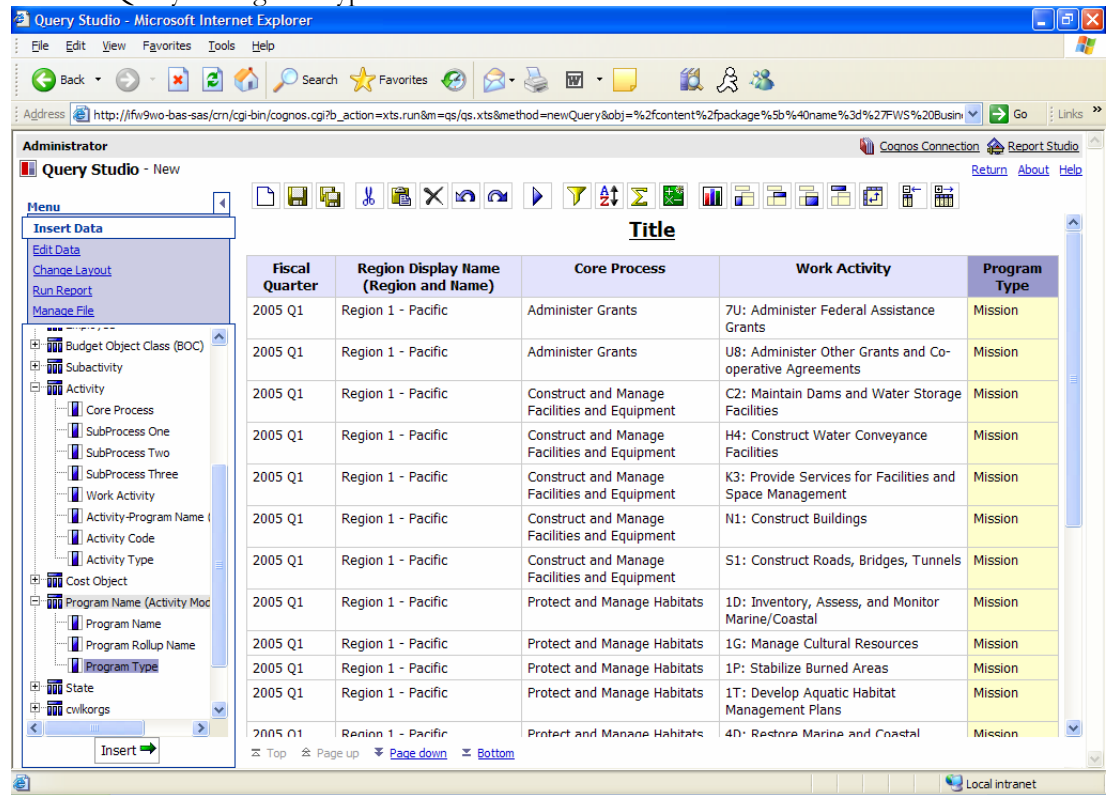


Figure 35 – ‘Program Type’ displayed in the query after dragging and dropping.

8. Click the plus sign to expand the ‘Program Name’ table in the business view.
9. Drag and drop the ‘Program Type’ field into the middle of the screen to the right of the Work Activity column.

Create a Query – Program Name

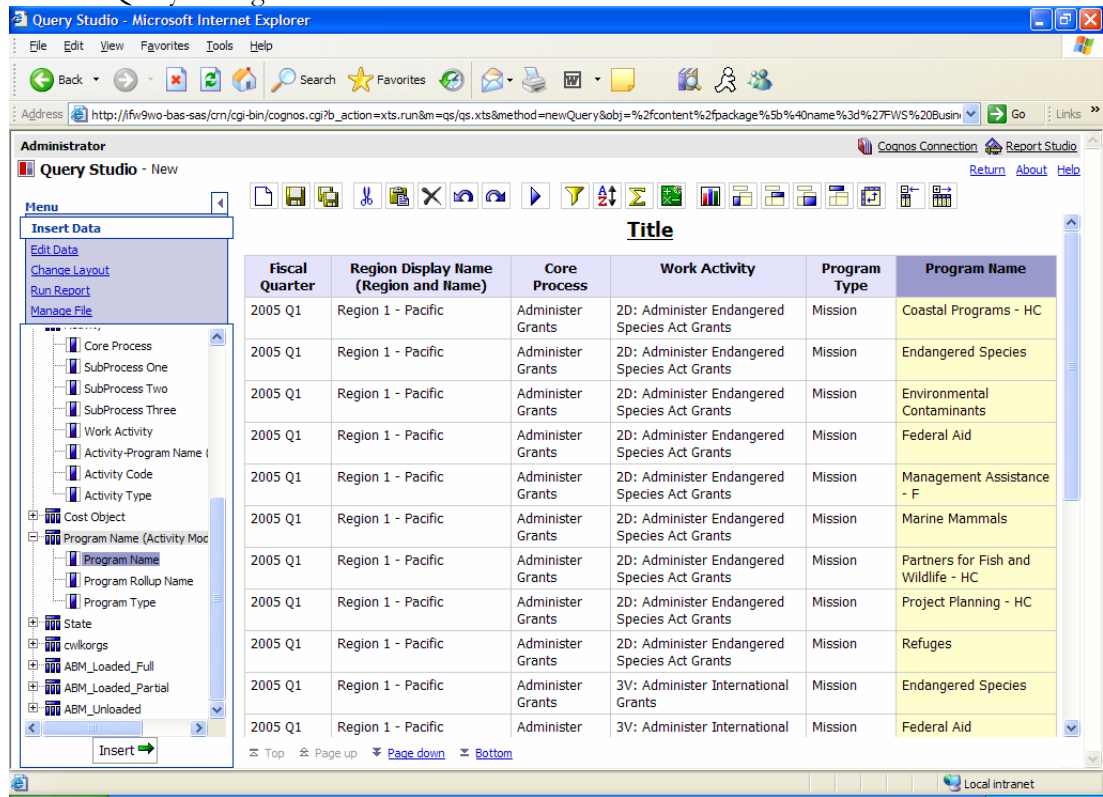


Figure 36 - 'Program Name' displayed in the query after dragging and dropping.

10. Drag and drop the 'Program Name' field into the middle of the screen to the right of the Program Type column.

5.5 Apply a Filter to the Query

For this query example, we want to apply a filter to each of the following columns:

- Fiscal Quarter
- Core Process

Filters:

- Fiscal Quarter – We want to view only ‘2005 Q1’ data
- Core Process – We want to view only ‘Administer Grants’ activity costs

Apply a Filter – Fiscal Quarter

The screenshot shows the Query Studio interface in Microsoft Internet Explorer. The main window displays a data table with the following columns: Fiscal Quarter, Region Display Name (Region and Name), Core Process, Work Activity, Program Type, Program Name, and Loaded Partial Cost. The 'Fiscal Quarter' column is highlighted in yellow, indicating that a filter has been applied. The table contains seven rows of data, all with '2005 Q1' in the 'Fiscal Quarter' column. On the left-hand side, the 'Menu' is open, and the 'Filter...' option is selected.

Fiscal Quarter	Region Display Name (Region and Name)	Core Process	Work Activity	Program Type	Program Name	Loaded Partial Cost
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Coastal Programs - HC	1.60689524
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Endangered Species	108,221.32626974
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Environmental Contaminants	9.19402123
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Federal Aid	1.11695105
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Management Assistance - F	41.30776094
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Partners for Fish and Wildlife - HC	77.8949396
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Project Planning - HC	1,254.65196158

Figure 38 – Apply a filter to the ‘Fiscal Quarter’ column

1. Click on the Fiscal Quarter column title in the query window.
2. Click on the link labeled ‘Edit Data’ on the left-hand side of the screen.
3. Click on the link labeled ‘Filter...’ also on the left-hand side of the screen.

Apply a Filter – Fiscal Quarter

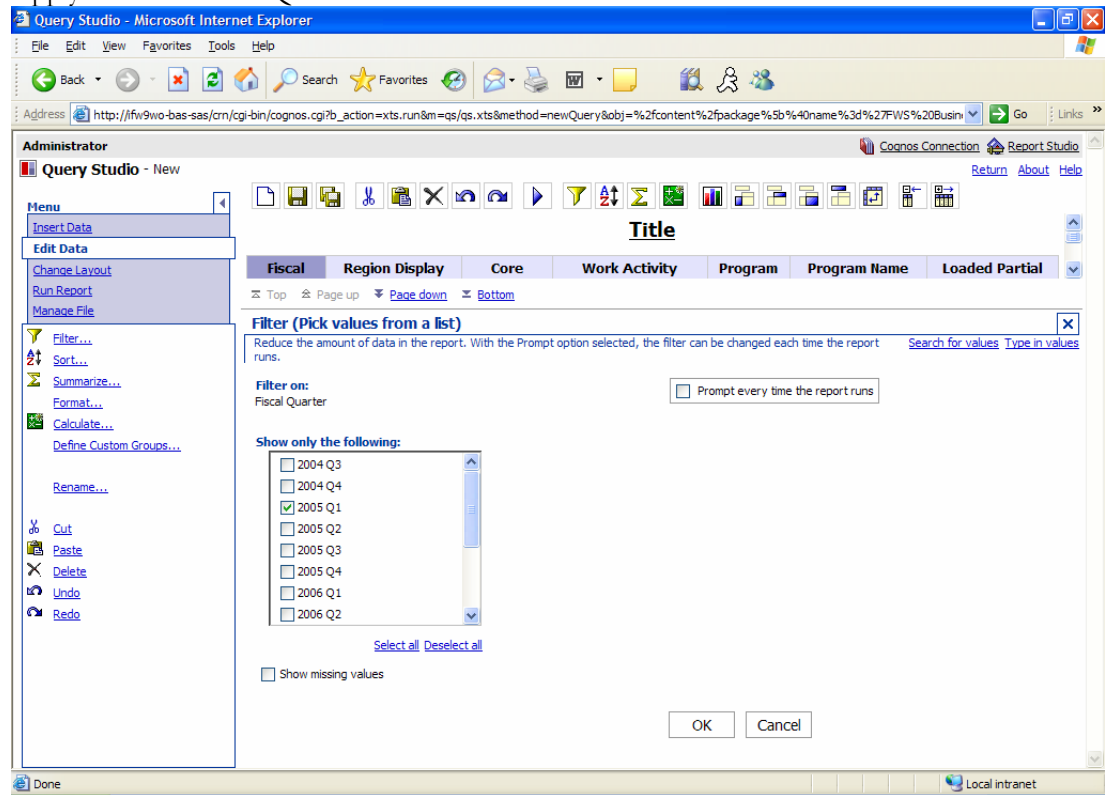


Figure 39 – Specify the ‘2005 Q1’ fiscal quarter in the filter screen

4. Place a checkmark in the box next to ‘2005 Q1’
5. Click OK at the bottom of the screen. The filter will be applied and automatically return you to the query screen.

Apply a Filter – Core Process

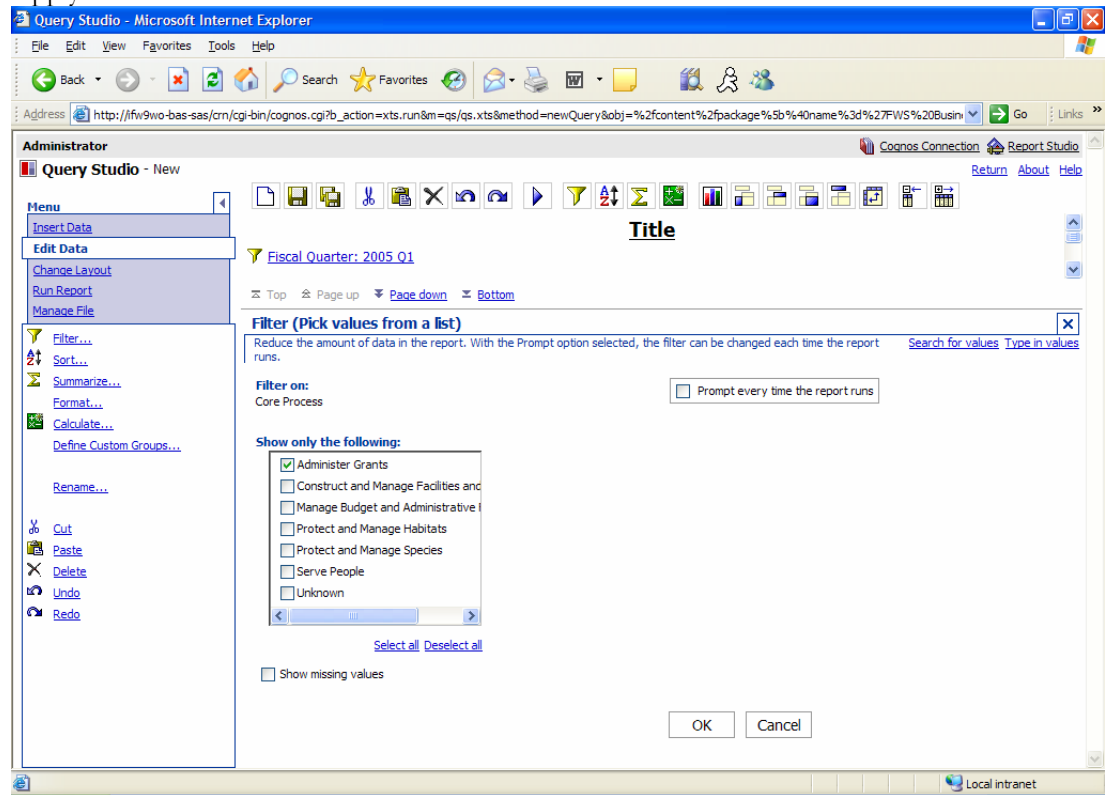


Figure 40 – Specify only the ‘Administer Grants’ core process in the filter screen

1. Click on the Core Process column title in the query window.
2. Click on the link labeled ‘Filter...’ on the left-hand side of the screen.
3. Place a checkmark in the box next to ‘Administer Grants’ as shown in Figure 40 above.
4. Click OK at the bottom of the screen.

5.6 Apply a Pivot to the Query

Pivot – Region Display Name

The screenshot shows the Query Studio interface in Microsoft Internet Explorer. The main content area displays a table with the following data:

Fiscal Quarter	Region Display Name (Region and Name)	Core Process	Work Activity	Program Type	Program Name	Loaded Partial Cost
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Coastal Programs - HC	1.60689524
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Endangered Species	108,221.32626974
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Environmental Contaminants	9.19402123
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Federal Aid	1.11695105
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Management Assistance - F	41.30776094
2005 Q1	Region 1 - Pacific	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Partners for Fish and Wildlife - HC	77.8949396
2005 Q1	Region 1 - Pacific	Administer	2D: Administer	Mission	Project Planning -	1,254.65196158

The interface includes a menu on the left with options like 'Change Layout', 'Pivot', and 'Expand Group'. The table title is 'Title'.

Figure 41 – Pivot the query by ‘Region Display Name’ to view the region name as columns across the top of the query.

1. Click on the ‘Region Display Name’ column title in the query.
2. Click on the link labeled ‘Change Layout’ on the left-hand side of the screen.
3. Click the link labeled ‘Pivot’ also on the left-hand side of the screen. The results will display in the query.

5.7 Sort Data in the Query

Apply Sort – Region Display Name

The screenshot shows the Cognos Query Studio interface. The main window displays a data table with the following columns: '2005 Q1', 'Administer Grants', 'U8: Administer Other Grants and Co-operative Agreements', 'Support', 'Budget, Planning and Human Resources - BPHR - GenOps', 'Business Management & Operations - BMO - GenOps', 'Central Office Operations', 'External Affairs', and 'Information Resources'. The table is filtered for 'Fiscal Quarter: 2005 Q1' and 'Core Process: Administer Grants'. The regional columns are 'Region 4 - Southeast', 'Region 3 - Great Lakes - Big Rivers', and 'Region 5 - Northeast'. The 'Sort...' option is highlighted in the 'Menu' on the left.

2005 Q1	Administer Grants	U8: Administer Other Grants and Co-operative Agreements	Support	Budget, Planning and Human Resources - BPHR - GenOps	Region 4 - Southeast	Region 3 - Great Lakes - Big Rivers	Region 5 - Northeast	Information Resources
					4,300.1296579			
							445.1089426	
								11

Figure 42 – Sort the Regional columns in ‘Ascending’ order

1. Click the ‘Region Display Name’ column titles.
2. Click on the link labeled ‘Edit Data’ on the left-hand side of the screen.
3. Click on the link labeled ‘Sort...’
4. Select ‘Ascending (A to Z)’ on the filter screen.
5. Click OK at the bottom of the screen.

Apply Sort – Program Type

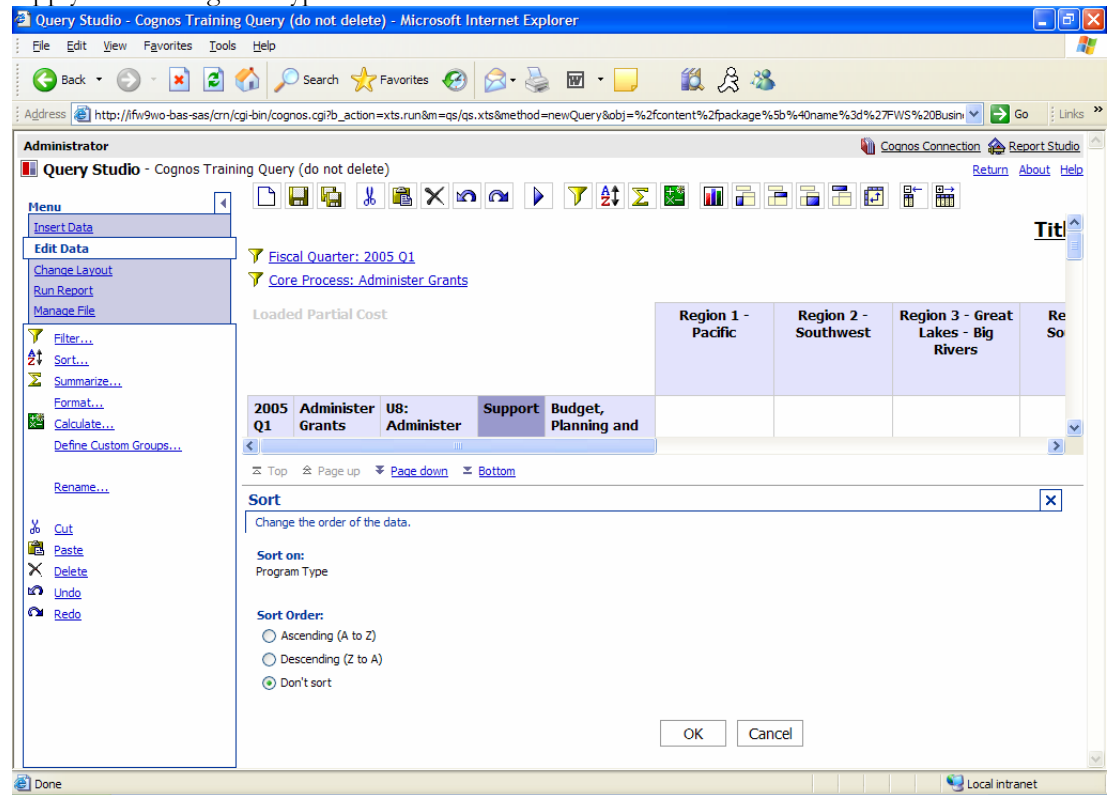


Figure 43 – Apply an ascending sort to the 'Program Type' field.

1. Click where the row heading is labeled 'Support' in the query.
2. Click 'Sort...' on the left-hand side of the screen.
3. Select 'Ascending (A to Z)' on the filter screen.
4. Click OK at the bottom of the screen.

5.8 Format the Query

Format Query – Loaded Partial Cost

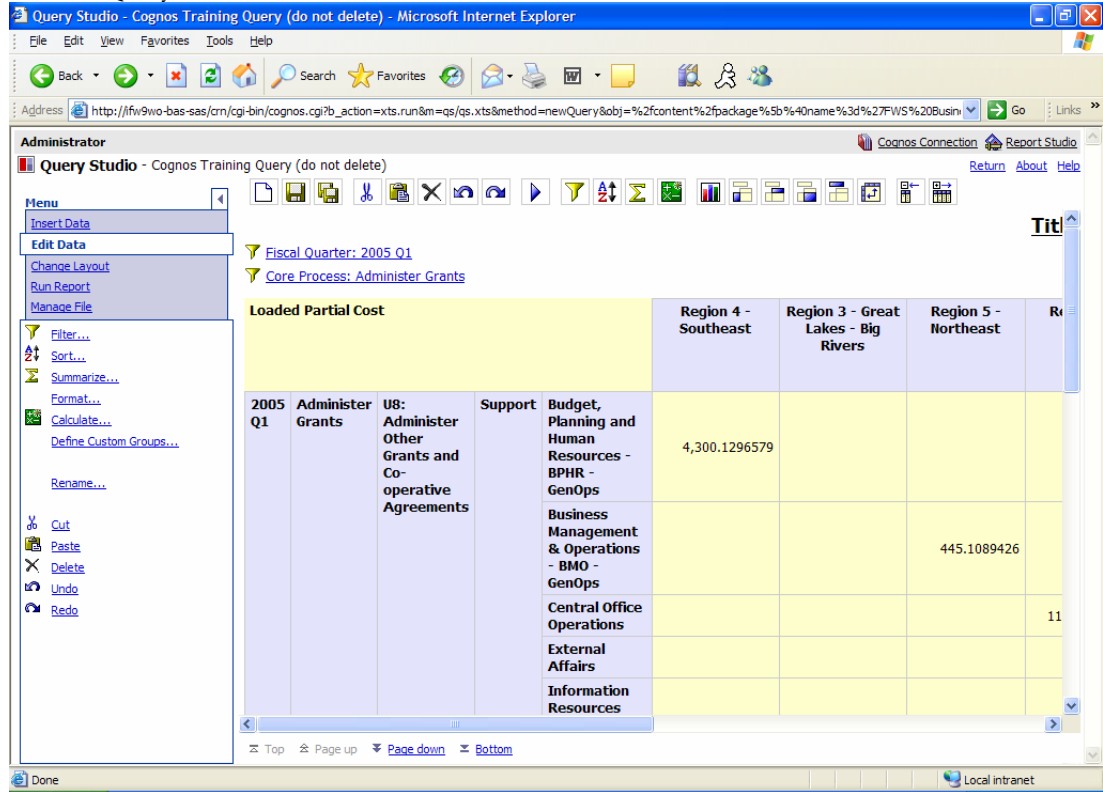


Figure 44 – Format the cost measure to currency with zero decimals.

In order to format a particular column or measure, click on the appropriate title in the query. In this example, we want to format the cost measure to ‘currency’ with zero decimals.

1. Click on the phrase ‘Loaded Partial Cost’ in the query. Notice that the cost cells will become highlighted in yellow.
2. Click on the link labeled ‘Format...’ on the left-hand side of the screen.

Format Query – Load Partial Cost

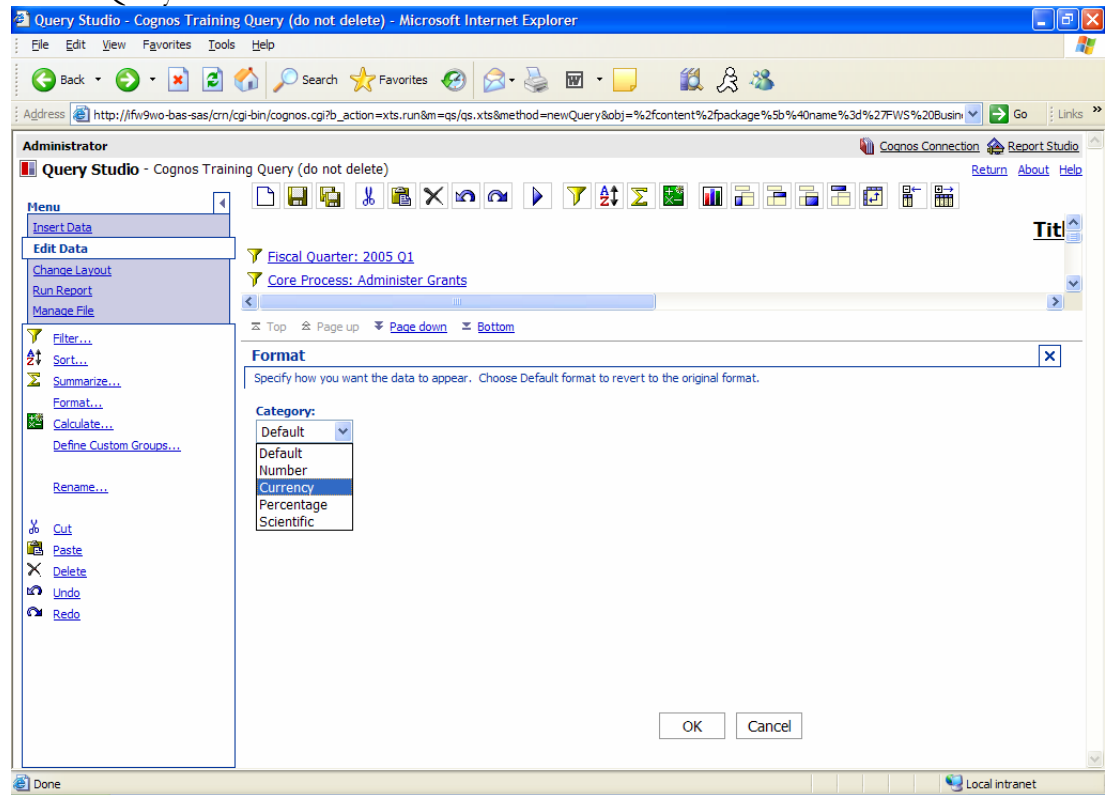


Figure 45 – Select ‘Currency’ from the drop-down list box in the format screen.

1. Select ‘Currency’ from the drop-down list box.

Notice that more criteria to specify will become available within the format screen as shown in Figure 46 below.

Format Query – Load Partial Cost

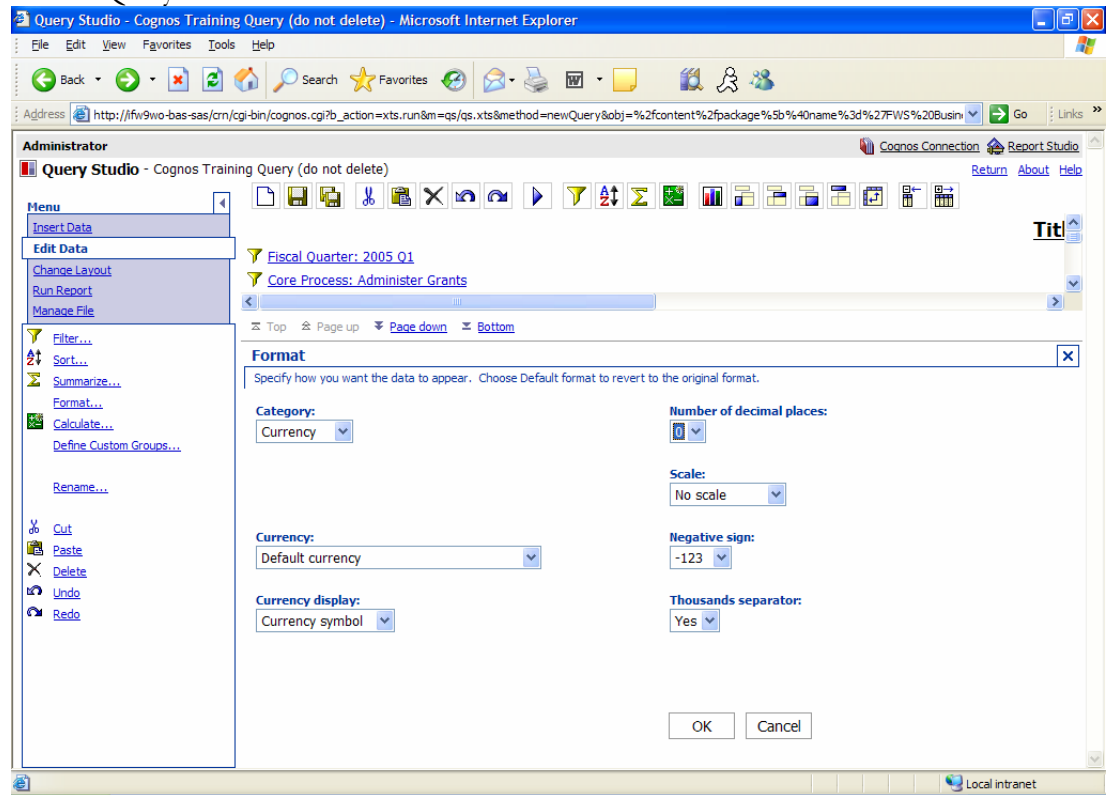


Figure 46 – Specify zero decimal places and whether or not you want a comma to separate the thousands in the cost display.

2. Specify '0' decimal places from the appropriate drop-down list box.
3. Select 'Yes' in the 'Thousands separator' drop-down list box.
4. Click OK at the bottom of the screen. The formatted query result will display.

5.9 Calculate a Percentage

Calculate a Percentage to the Total Cost

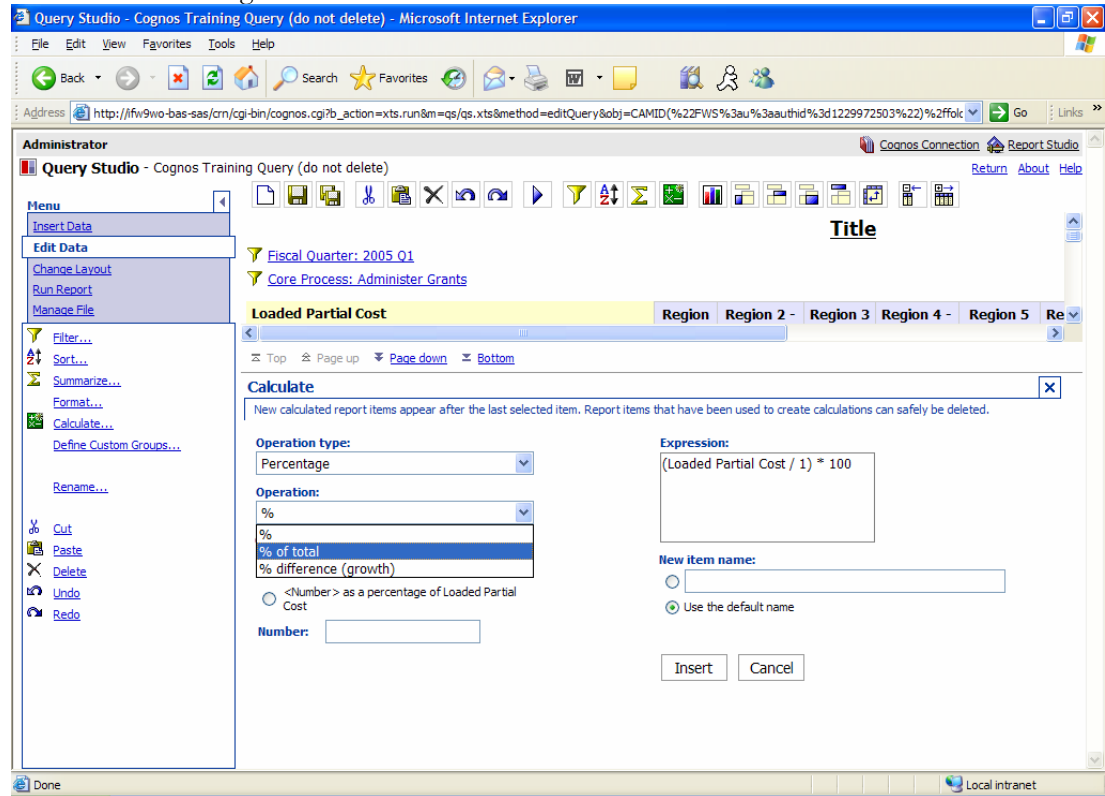


Figure 47 – Calculate a percentage of activity costs to the total cost by region.

1. Click the 'Loaded Partial Cost' title in the query. Notice that the cost cells become highlighted in yellow.
2. Click on the link labeled 'Calculate...' on the left-hand side of the screen.
3. Select 'Percentage' from the 'Operation type' drop-down list box.
4. Select '% of total' from the 'Operation' drop-down list box.

Calculate a Percentage to the Total Cost

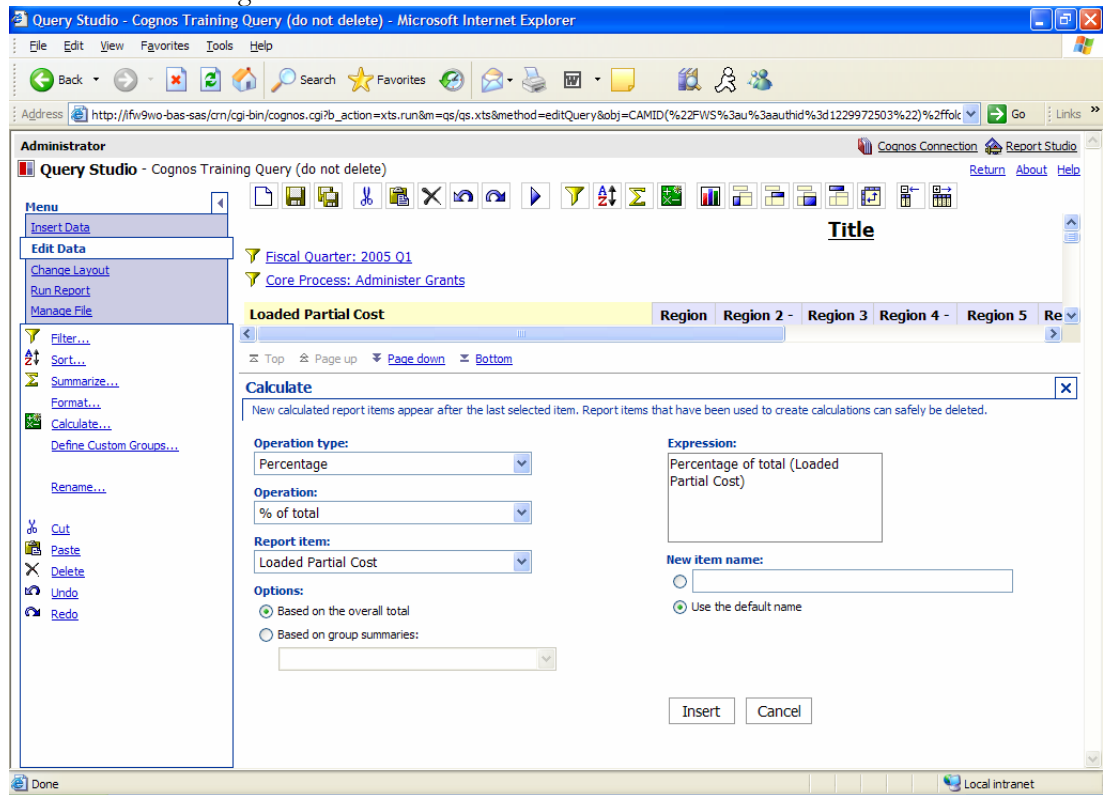


Figure 48 – Specify the ‘Options’ criteria to be ‘Based on the overall total’.

5. Specify the ‘Options’ criteria to be ‘Based on the overall total’.
6. Click ‘Insert’ at the bottom of the screen.

Calculate a Percentage to the Total Cost

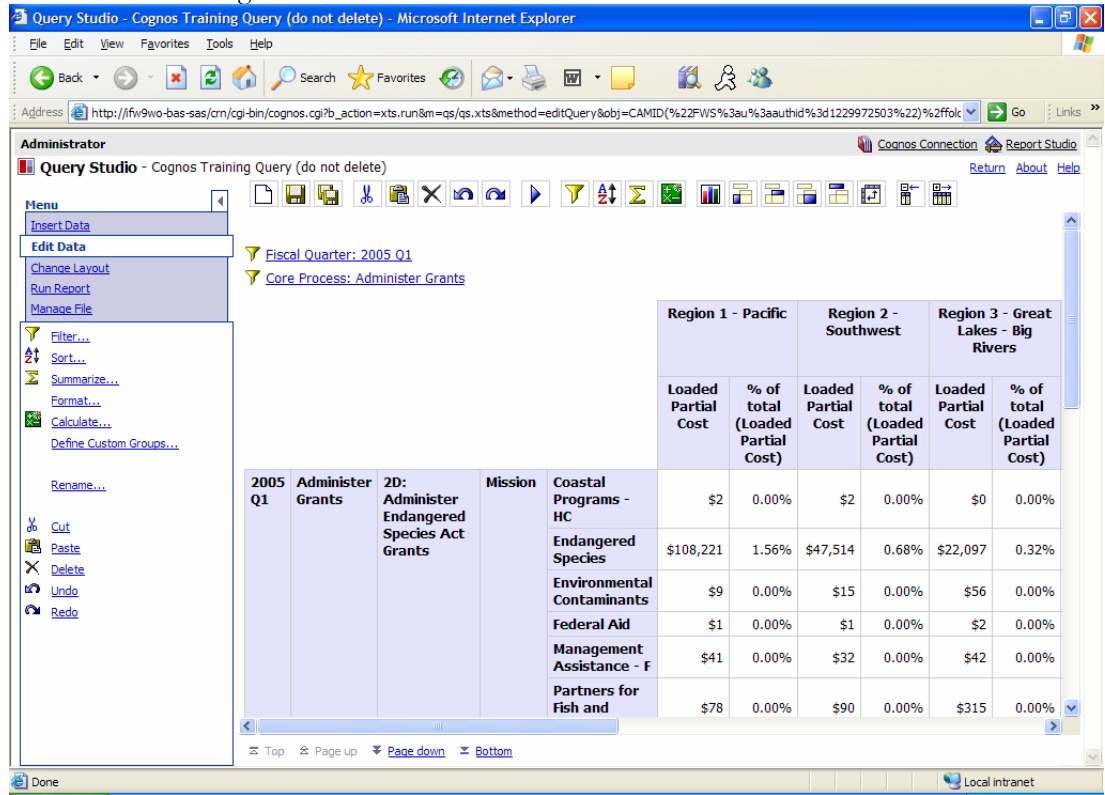


Figure 49 – The resulting query showing the percentages to the total cost by region.

Now that you’ve created the query and applied filters and basic formatting, you are ready to save the query to ‘My Folders’.

5.10 Save the Query

Save the Query – ‘My Folders’

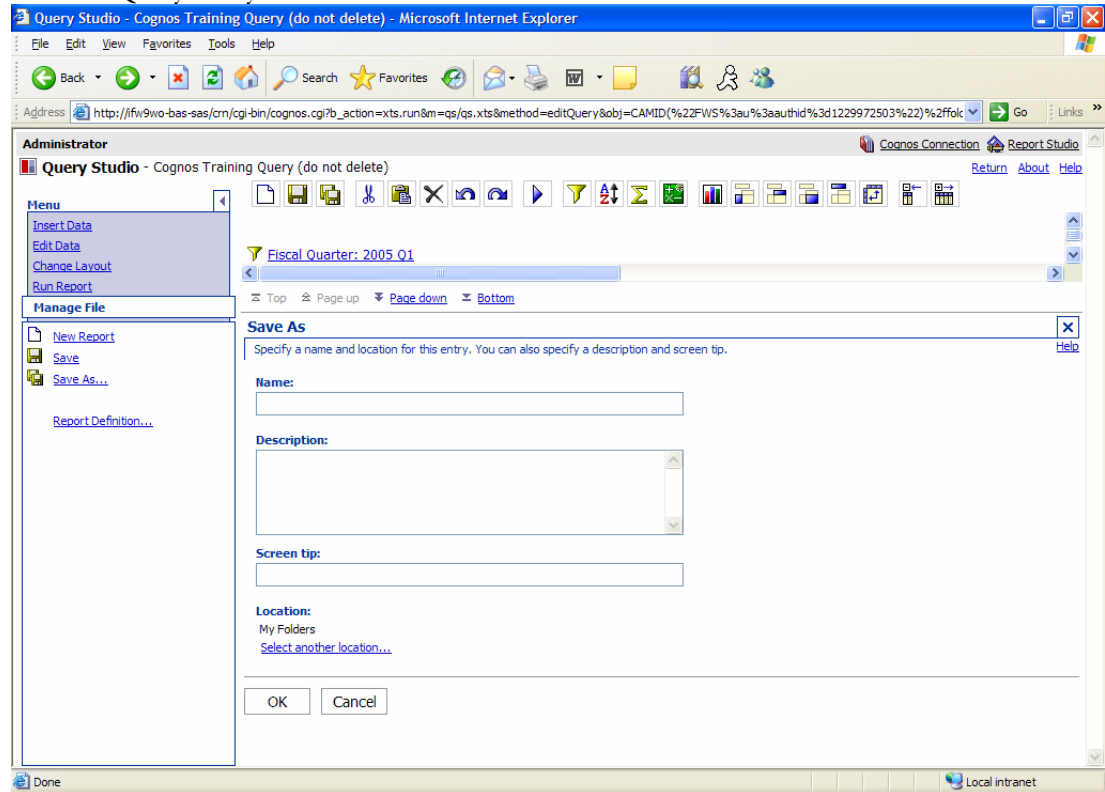


Figure 50 – Save the query to ‘My Folders’

1. Click on the link labeled ‘Manage File’ on the left-hand side of the screen.
2. Click ‘Save As...’ also on the left-hand side of the screen
3. Specify a name for the query, call it: ‘Q1 Administer Grants Costs by Region’
4. Specify a description and/or a screen tip if you wish.
5. Specify the location to be ‘My Folders’ if it is not already.
6. Click OK at the bottom of the screen. The query will be published to ‘My Folders’.

5.11 Create a Chart

Create a Chart

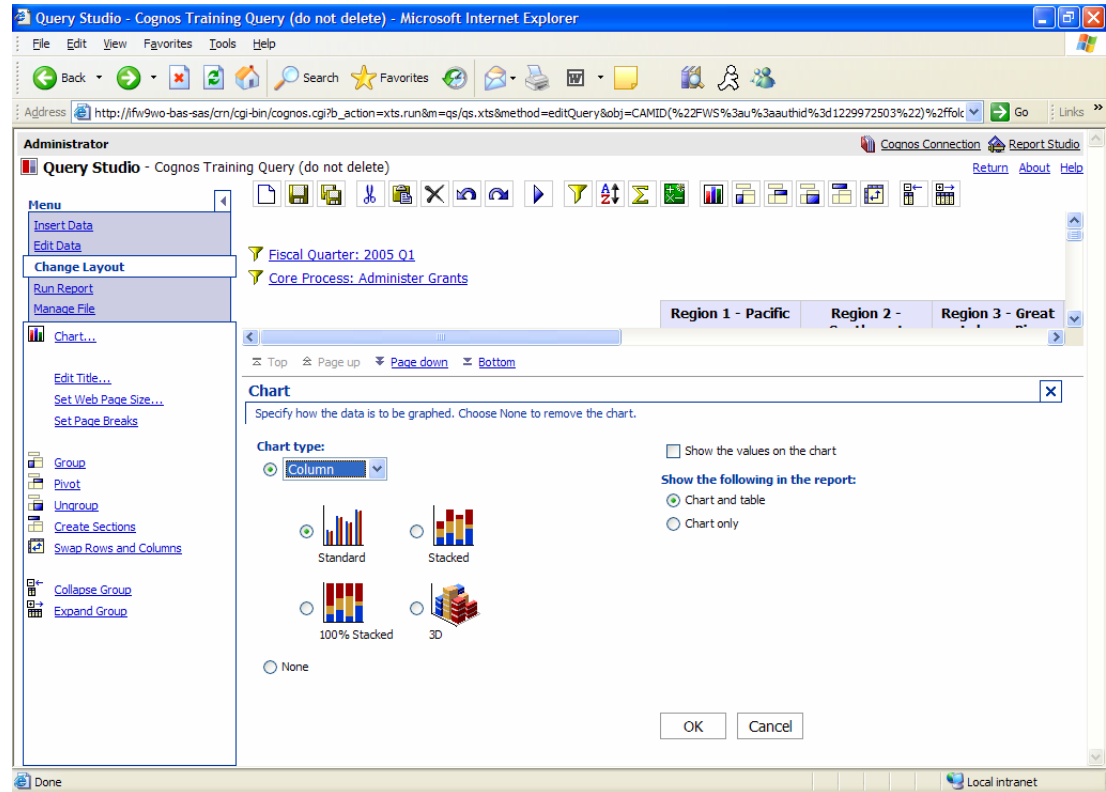


Figure 51 – Create a chart based upon the newly created query.

1. Click on 'Change Layout' on the left-hand side of the screen.
2. Click 'Chart...' also on the left-hand side of the screen.
3. Specify a chart type from the drop-down list box.
4. Select the specific chart.
5. Specify 'Chart and table'.
6. Click OK at the bottom of the screen.

Create a Chart

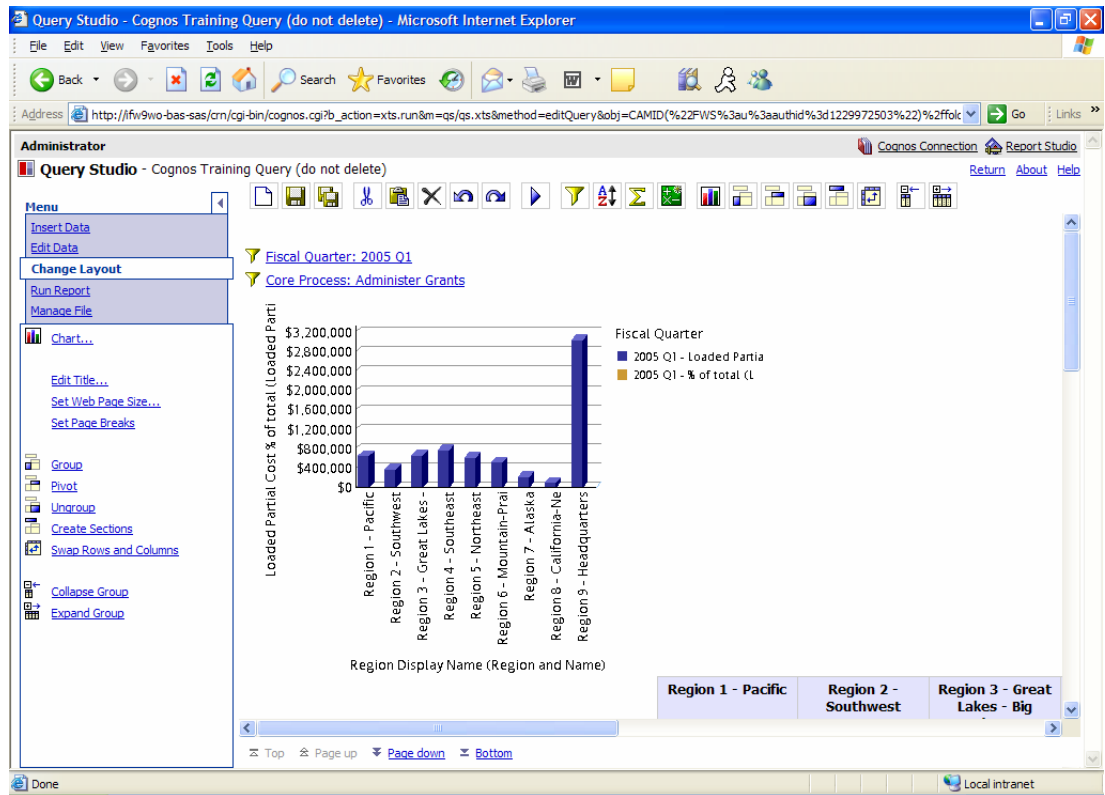


Figure 52 – The resulting bar chart based upon the newly created ‘Administer Grants’ query.

Additional formatting of the chart can be accomplished using Report Studio.

*Training on Report Studio will be conducted at a later date.

5.12 Run Report Functionality

Run Report Functionality

The screenshot shows the Cognos Query Studio interface within a Microsoft Internet Explorer browser. The browser address bar shows a URL starting with 'http://fw9wo-bas-sas/crn/cgi-bin/cognos.cgi?b_action=xts.run&m=qs.qs.xts&method=editQuery&obj=CAMID(%22FWS%3au%3aaauthid%3d1229972503%22)%22ffok'. The Cognos interface includes a menu on the left with options like 'Insert Data', 'Edit Data', 'Change Layout', 'Run Report', and 'Manage File'. The 'Run Report' menu is expanded, showing options such as 'Run with All Data', 'Preview with Limited Data', 'View in PDF Format', 'View in Excel 2000 Single Sheet Format', 'View in Excel 2002 Format', 'View in CSV Format', 'View in XML Format', and 'Advanced Query Options...'. The main area displays a data table with columns for '2005 Q1', 'Administer Grants', '2D: Administer Endangered Species Act Grants', 'Mission', and three regional cost categories: 'Region 1 - Pacific', 'Region 2 - Southwest', and 'Region 3 - Great Lakes - Big Rivers'. Each regional category has sub-columns for 'Loaded Partial Cost' and '% of total (Loaded Partial Cost)'. The table lists various programs and their associated costs and percentages.

2005 Q1	Administer Grants	2D: Administer Endangered Species Act Grants	Mission	Region 1 - Pacific		Region 2 - Southwest		Region 3 - Great Lakes - Big Rivers	
				Loaded Partial Cost	% of total (Loaded Partial Cost)	Loaded Partial Cost	% of total (Loaded Partial Cost)	Loaded Partial Cost	% of total (Loaded Partial Cost)
			Coastal Programs - HC	\$2	0.00%	\$2	0.00%	\$0	0.00%
			Endangered Species	\$108,221	1.56%	\$47,514	0.68%	\$22,097	0.32%
			Environmental Contaminants	\$9	0.00%	\$15	0.00%	\$56	0.00%
			Federal Aid	\$1	0.00%	\$1	0.00%	\$2	0.00%
			Management Assistance - F	\$41	0.00%	\$32	0.00%	\$42	0.00%
			Marine Mammals						

Figure 53 – The ‘Run Report’ section allows the end-user to view the query in one of several different formats; the same formats that are available using Report Viewer.

As shown in Figure 53 above, the query may be viewed in the following formats:

- PDF
- Excel 2000 or 2002
- CSV
- XML

Click on the appropriate link on the left-hand side of the screen to view the query in the desired format. The query results will be displayed in a new window. *Remember, crosstab/chart type queries will not display in .csv or .xml formats.

Section 6: Review

We successfully covered the following topics:

- Accessing Cognos
- Accessing and Maintaining Folders
- Viewing Reports in Report Viewer
- Exporting Functionality
- Accessing Query Studio
- Creating and Formatting Queries
- Accessing PowerPlay
- Creating PowerPlay Reports

Section 7: Points of Contact

If you have any additional questions about model data or need further assistance in using the Cognos application suite, please do not hesitate to contact one of our project team members. Please see our contact information on the following page.

Thank you for your time.

-The Fish and Wildlife Service ABC project team

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