Generating Reports

This chapter contains the following topics:

Configuring Client Browsers to View a Report in Excel Format

Some users may report an issue with attempting to view a report in Excel format. The Excel screen pops up briefly and then disappears. To address this issue, add the Cognos Server URL to the Local Intranet zone of the client browser:

Step 1 Open the client browser window.

Step 2 Choose **Tools > Internet Options**.

Step 3 Click **Security**.

Step 4 Choose the **Local Intranet** zone.

Step 5 Click **Sites**.

Step 6 Click **Advanced**.

Step 7 Enter the Cognos Server URL.

Note To determine the Cognos server URL, try one of the View as Excel features in the Reporting module and look for the URL that appears in the title bar of the window that appears briefly before closing itself. This is the URL you need to enter. You may want to load a screen capture application and snap the screen if it disappears too quickly to read in real time.

Step 8 Click **Add**.

Modifying User Preferences to View Reports

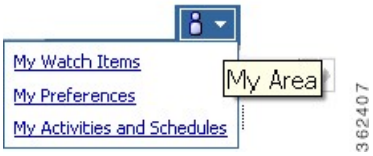
Cognos offers two ways of viewing the reports and folders, represented by icons at the top right of each page. The selected view is highlighted.

	The “Details View” includes a brief description of each report.
	The “List View” is the default view. Once you become familiar with the reports, folders, and their contents, you may want to switch to this view, which simply lists the contents of the current folder, as shown below.

Figure 1: List View

Rather than setting this view manually, the Preferences page allows you to set preferences that are used whenever you use the Reporting module. To set preferences, click the My Area link to the top-right of the menu bar, then My Preferences.

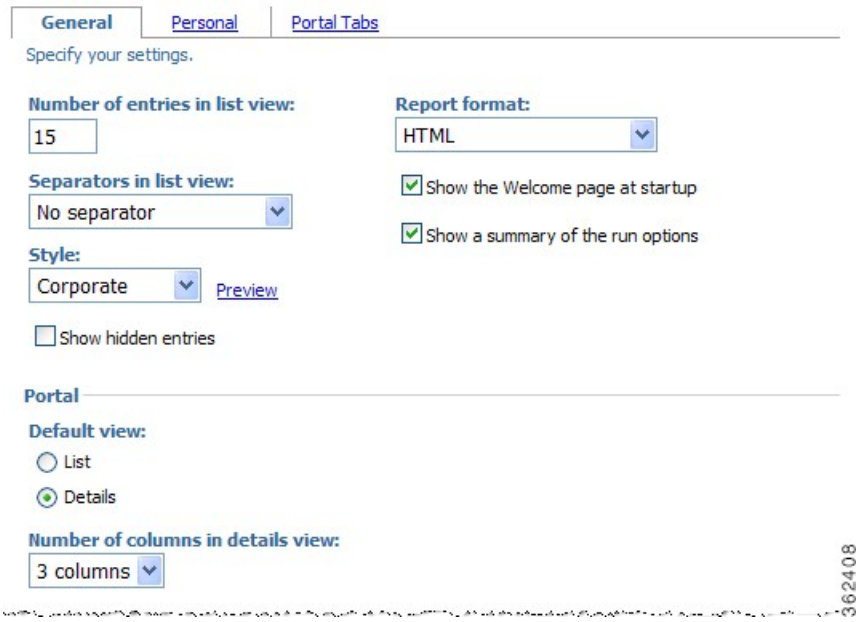
Figure 2: My Area



The General tab of the Set Preferences page appears.

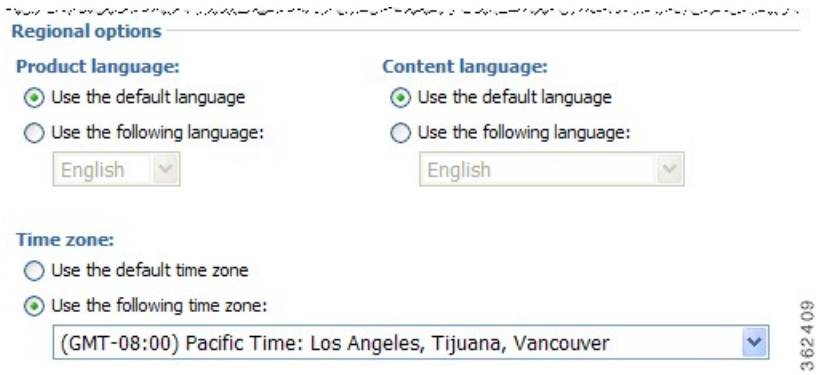
Entries at the top of the page allow you to change the default view (List or Details) and to further customize that view.

Figure 3: My Preferences General Tab



Entries at the bottom of the page pertain to the user's location/locale. The time zone is used when scheduling reports. The default time zone is the time zone where the reporting server is located. In a distributed implementation, users need to set the time zone to their current location in order to easily schedule reports to be run.

Figure 4: My Preferences General Tab Regional Options



There is no support for rendering of non-English form data or facts table content at this time. The product and content languages should be set to the default language which is English.

Prebuilt Reports Inventory

Service Catalog reports (available in the top-level public folder Service Performance Reports), and the folder in which each is located, are summarized in the table below.

The Service Authorization and the Service Delivery reports include any ad-hoc tasks that were initiated in the authorization and service delivery moments, respectively. They do not include any tasks that were part of requests that were cancelled, either by the user or by a service team manager cancelling delivery of the request.

Table 1: Service Catalog Reports Table

Report Title	Folder	Description
Aging of Requests by Performer	Daily Request Management	Effective for investigating or reporting on the number of open and late tasks for an individual
Aging of Requests by Queue	Daily Request Management	Effective for investigating or reporting on the number of open and late tasks for a queue
Authorization: On-time % by Customer	Service Authorization Performance	Effective for investigating or reporting on the authorization on-time performance by a customer (OU)
Authorization: On-time % by Performer	Service Authorization Performance	Effective for investigating or reporting on the authorization on-time performance by individuals
Authorization: On-time % by Queue	Service Authorization Performance	Effective for investigating or reporting on the Authorization on-time performance by queues
Services by Dictionary	Service Design Details	Administrative report for managing the use of dictionaries
Functional Positions	People, Roles & Groups	Administrative report which lists all functional positions
Groups by Organizational Unit	People, Roles & Groups	Administrative report which lists groups and shows their Organizational Unit
Groups by People	People, Roles & Groups	Administrative report which lists People and shows their groups
Organizational Units by Group	People, Roles & Groups	Administrative report on groups and their organizational units
Organizational Units by People	People, Roles & Groups	Administrative report on people and their organizational units
Organizational Units by Queues	People, Roles & Groups	Administrative report on queues and their organizational units

Report Title	Folder	Description
People by Groups	People, Roles & Groups	Administrative report listing people and their groups
People by Organizational Unit	People, Roles & Groups	Administrative report listing people and their organizational units
Queues by Organizational Unit	People, Roles & Groups	Administrative report listing queues by organizational unit
Service Delivery: On-time % by Performer	Service Delivery Performance	Effective for evaluating or comparing the performance of individuals in performing their work
Service Delivery: On-time % by Queue	Service Delivery Performance	Effective for evaluating or comparing the performance of queues in performing their work
Service Delivery: On-time % by Service	Service Delivery Performance	Effective for evaluating the on-time performance for services and their related tasks
Service Pricing Details	Service Design Details	Administrative report for managing the pricing information for services
Service Volume: Request Activity by Service	Service Volumes & Activity	Effective for measuring and monitoring total service request activity within service groups
Service Volume: Request Activity Details	Service Volumes & Activity	Effective for investigating or reporting on the status of individual service delivery transactions
Service Volume: Request Activity Summary	Service Volumes & Activity	Effective for measuring and monitoring total service request activity within specific reporting periods
Service Volume: Request Trend by Service	Service Volumes & Activity	Effective for measuring and monitoring service request activity trends by service group and calendar quarter
Services by Service Team	Service Design Details	Effective for managing expenditures for services against an established budget

Creating Reports and Queries

Detailed instructions on using Query Studio and Report Studio are in the User Guides supplied by IBM/Cognos, which are available from the vendor's web site. This section addresses concerns specific to the Service Catalog data mart and the framework that allows query and report builders access to that data mart.

Both tools allow equivalent access to the query subjects and query items exposed in the custom package. Reports or queries are created simply by dragging items from the Insertable Objects pane at the left of the

page to the Reporting pane. As each item is added to the report, Cognos automatically adjusts the underlying SQL that is used to retrieve data for the report. To do so, Cognos relies on the relationships defined in the custom package through which the data mart is exposed. This package includes relationships between the dynamically defined dictionary-based dimensions and all fact tables. These relationships rely on database inner joins; information on a task or requisition (from the corresponding fact query subject) will appear in a report containing dictionary-based information only if the dictionary was used in the service to which the requisition or task applies.

Because Query Studio is an easier tool to use than Report Studio, especially for new users, We recommend that users start with Query Studio. If they are unable to implement the functionality for the required report, they may save the query and subsequently edit and enhance it in Report Studio; all queries created in Query Studio are upward compatible with Report Studio.

In particular, the following types of requirements should be implemented using Report Studio:

- Reports that need to display a percent of total, for example, percentage of tasks of a particular type that were on time or late.
- Reports that need to list requisitions with dictionary data, but have the dictionary data blank for services in which the dictionary was not used; this can be implemented via master-detail reports in Report Designer.
- Reports with complex filters, for example, in which either one or the other of a condition may apply for data to be included in the report. (In Query Studio, all filters are logically AND'ed, so that all conditions must be satisfied for a row to be included in the report.)

Using Standard Reports

The Standard Reports Package contains denormalized base data tables. These tables are used as the basis for the prebuilt reports as well as providing summary data tables for populating the KPIs.

Each of these tables is a standalone entity—it is not possible to join a table to any other in order to create a new report or modify an existing report. If you need to make modifications to a standard report, your best bet is to construct the desired report from scratch, using the Service Catalog data mart and the Custom Reports package. This section gives some hints on how to do this for some of the reports, using Ad-Hoc Queries (Query Studio) to construct the query.

People, Roles, and Groups

The reports in the People, Roles, and Groups folder can be duplicated by using the query subjects in the Organizations folder (Person, Group, and Organizational Unit) and the Queue dimension. The reports are fairly straightforward and can be generated by inserting the appropriate items on the report and grouping as desired.

For example, the Organizational Units by People report might look like this:

Figure 5: Sample Report

Organizational Units by People

Person	Organizational Unit	Organizational Unit Type
Bernard Castaldo	Architectural and Functional Coatings	Business Unit
Bruce Madison	Global Internet Sales	Service Team
	Global Customer Implementation	Service Team
	Global Customer Specialists	Service Team
	Information Technology	Business Unit
Cheryl Tower	ER Credit Cards	Service Team
	Global Order To Cash	Service Team
	Information Technology	Business Unit
Christina Holzner	APR Product Integrity	Service Team
	Discretionary Work	Service Team
	EM Product Integrity	Service Team
	Global Solution Planning	Service Team

362432

The report definition (viewable under Manage File in Query Studio) to build this report would look like the following figure (with a group specified on the Person Full Name, and the filter defined as a “Search and Select” filter).

Figure 6: Report Definition with Standard Filter Option

Report Definition

Provides the expression for each report item. Query Information

Report Item	Expression
Person Full Name	[FormETL].[Person].[Person Full Name]
Person Full Name	[FormETL].[Person].[Person Full Name] in (<selected people go here>
Organizational Unit Name	[FormETL].[Organizational Unit].[Organizational Unit Name]
Organizational Unit Type	[FormETL].[Organizational Unit].[Organizational Unit Type]

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The same query items, with a different set of filters, are used in the “People by Organizational Unit” report:

Figure 7: Report Definition with Changed Filter Option

Report Definition

Provides the expression for each report item. Query Information

Report Item	Expression
Organizational Unit Name	[FormETL].[Organizational Unit].[Organizational Unit Name]
Organizational Unit Name	[FormETL].[Organizational Unit].[Organizational Unit Name] in
Organizational Unit Type	[FormETL].[Organizational Unit].[Organizational Unit Type]
Organizational Unit Type	[FormETL].[Organizational Unit].[Organizational Unit Type] in (?Organizational Unit Type?)
Person Full Name	[FormETL].[Person].[Person Full Name]

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Service Design Details

Like the reports in the People, Roles, and Groups folder, those in the Service Design Details folder are fairly easy to produce. Simply choose the desired items from the Dictionary and Service dimensions and group as desired.

For example, the “Services by Dictionary” report as produced by Ad-Hoc Query could look like this:

Figure 8: Sample Dictionary

Services by Dictionary

Dictionary	Service	Status	Service Group
ACCESS_CONFIRMATION	Shared Folder - Access Request	Active	Security_Administration_Services
	NT Group - Access Request	Active	Security_Administration_Services
ACCESS_INDIVIDUAL_ACCOUNT_INFO	Access to Individual's Personal Accounts	Active	Security_Administration_Services
ACCOUNT_DISABLE	Disable NT and Lotus Notes Account	Active	Security_Administration_Services
ACCOUNT_EXPIRED	Windows (AD) Account - Expired - Extend	Active	Security_Administration_Services

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To exactly duplicate the appearance and behavior of the standard report, the following activities are required in Report Designer:

- Modify the report title so it is left-justified.
- Include a Search-and-Select Filter for the dictionary on a prompt page.

Request Management

The Request Management folder includes two aging reports, which break down tasks into buckets, based on the number of days late the task is. The buckets are defined as 1–3 days late, 3–7 days late, 1–2 weeks late, and over 2 weeks late. The reports group the late tasks either by queue or by performer.

Figure 9: Aging Report

Aging of Tasks by Queue

Org. Unit	Performer	Task	1-3 days	3-7 days	1-2 weeks	>2 weeks	Total Open	Total Late	Late %
Delhi IT	Delhi IT Queue	Deliver/Install PC	0	0	0	1	1	1	100%
		Setup Phone/Voicemail	0	0	1	0	1	1	100%
	Delhi IT Queue		0	0	1	1	2	2	100%
Delhi IT			**0**	**0**	**1**	**1**	**2**	**2**	**100%**
Bangaluru IT	Bangaluru IT Queue	Call-Center Review	2	0	0	0	2	0	100%
		Follow-up Resolved Issue with Customer	2	0	0	0	2	0	100%
	Bangaluru IT Queue		4	0	0	0	4	0	100%
Bangaluru IT			**4**	**0**	**0**	**0**	**4**	**0**	**100%**

362439

This report is essentially a pivot report. The metric that is pivoted is the age of the open task. To produce this report:

- Place the appropriate attributes/dimensions on the report work area—the queue organization; the queue name; and the task name for the Delivery Tasks fact.
- Compute the age of the task by taking the difference (in days) between the current date and the task due date.
- Set up a custom group for the four aging buckets.
- Pivot the report using the custom group (Age) as the metric.

Service Volumes and Activity

The Service Volumes and Activity reports give summary information on the number of services requests started within a particular time frame, and the current status of those requests. For example, the Service Volume: Request Activity by Service looks like this:

Figure 10: Sample Request Activity by Service

Service Volume: Request Activity by Service

This report covers the period from Jan 1 2007 to Jun 30 2007

Service Group	Service Name	New Requests	Ongoing	Completed	Cancelled	Delivery Cancelled	Rejected
Ariba_Services	Ariba - Access Request	65	0	40	16	1	0
	Ariba - Problem	355	12	320	2	0	0
Business_Intelligence_BI	Business Intelligence (BI)/Business Warehouse (BW) Reporting - Production Support Service	311	14	233	4	0	0
Call_Center_Services	Customer Information Service	49	1	43	1	1	0
	General Request	1,015	40	888	12	4	0
	Password Reset - Any Application	1,997	3	1,970	16	1	0
	Software Issues	847	22	748	5	1	0
Grand Totals:		**4,639**	**92**	**4,242**	**56**	**8**	**0**

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Because of the complexity of the computations (tallying up the counts based on the status of the request), this report needs to be implemented in Report Designer.

Creating Custom Reports

The Advanced Reporting module provides the ability to write ad-hoc queries and reports. The module includes three options:

- The Home page provides shortcuts for running the Standard reports, without having to choose the Reporting module from the Service Catalog drop-down menu.
- The Ad-Hoc Reports tab provides access to IBM Cognos Query Studio, for writing queries against the data mart.
- The Report Designer tab provides access to IBM Cognos Report Studio, for writing professional quality reports against data mart.

Users must be granted appropriate permissions to access the Ad-Hoc Reports and Report Designer options.

This section offers instructions on how to access the Advanced Reporting Module and detailed information on the contents and structure of the Service Catalog data mart.

Accessing the Advanced Reporting Module

To use the advanced reporting capabilities, from the Service Catalog drop-down menu, choose the **Advanced Reporting** module.

The Home Page of the Advanced Reporting option displays the three predefined public folders.

- The Reports folder offers an alternate path to the prebuilt reports accessible as part of the Reporting module. Custom-designed report views and any new reports created via Ad-hoc Reports or Report Designer will also typically be stored on subfolders of the Reports folder.
- The remaining folders (Custom Reports Data Model, Standard Reports Data Package) are packages which are used by Report Designer and Ad-Hoc Reporting, allowing you to build queries and reports against the Service Catalog data mart.

Typically, you will click a tab corresponding to the Ad-Hoc Reports or Report Designer option. These options start the Cognos Query Studio and Report Studio components respectively. You will then be asked to choose which of the two reporting package you want to use.

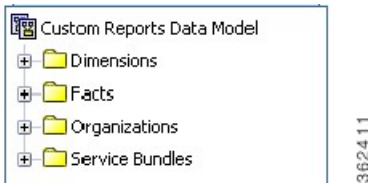
To access the data mart, choose the **Custom Reports Data Model** by clicking on the name. If you are using Report Designer, you will then be asked to specify the type of report you would like to create. Specify a list (it is the easiest). If you are using Ad-Hoc Reports, Query Studio automatically opens for a list report. The Custom Reports package appears in the left-hand pane, labeled “Insertable Objects”.

The data mart is configured as a dimensional model.

- The basic transactional data in a dimensional model is called a **fact**. Facts in the data mart include the tasks, requisitions, and effort entry. Each fact may include several measures—numeric quantities. For example, the estimated duration of a requisition is a measure, as is the actual duration.
- Each fact has relationships to one or more **dimensions –** descriptive attributes that can be used to choose or filter the rows in the related fact. For example, dimensions that describe the task-based facts include the task performer as well as the date the task was closed. Dimensions, in turn, are usually shared across multiple facts. For example, the service dimension may describe both a task and a requisition.
- Each fact, together with its related dimensions constitutes a **star schema**.
- In addition to star schemas, the Custom Reports Package includes other tables to provide complete coverage for potential reports and queries users might need to formulate about form, dictionary and service-based data, as well as the organizational structure at the site.

The dimensions and facts are grouped within the corresponding folders. In addition, the Organizations folder holds data on the organizations, groups, and people in use at the site. The Service Bundles folder holds data on the service bundles and child service which were associated to the parent service to form the bundle.

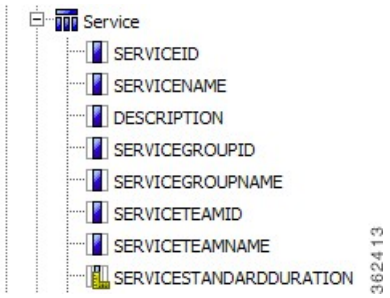
Figure 11: Custom Reports Data Model Tree View



As you expand the folders, all of the dimensions and facts become visible. Each object designated by the icon is a query subject which groups a related set of fields or query items. Expanding the query subject will show its query items.

A query item can be a unique identifier, an attribute or a measure/metric, as indicated by the icon to the left of the item name:

Figure 12: Service Tree View



	Attribute
	Metric

Metrics are numbers which can be used in arithmetic expressions. By virtue of an item being defined as a metric, its value can be aggregated (for example, averaged, totaled or counted) to provide report totals or subtotals when the report or query has several levels or groups. In addition, metrics can be used in a wide variety of arithmetic, analytic, and percentage calculations, as specified by the report designer and provided by the Cognos tools.

A list of all query subjects and the query items which comprise each subject, with a description of each query item, is given in the tables at the end of this section.

Dimensions

The Custom Reports Package includes the following types of dimensions:

- Static dimensions are available in all installations, and are listed directly under the Dimensions folder. These dimensions describe customers, performers, dates, and other information related to tasks and requisitions.
- The DictionaryData folder lists all dimensions based on dictionaries which were specified as Reportable, and were therefore loaded into the data mart. Each reportable dictionary is available in the DictionaryData folder. Each dictionary query subject includes all fields in the dictionary, whether they were hidden or not in any or all services. One or more dictionary dimension can be joined with any fact, providing a flexible reporting and filtering mechanism.
- The ServiceData folder contains all services which were specified as Reportable, and were therefore loaded into the data mart. Each service query subject contains all fields in all dictionaries used in the service, provided that the number of fields allowed per service is not exceeded; if so, the dictionaries and fields are omitted from the service. The service query subjects are not, strictly speaking, dimensions;

they should not be combined with a fact for reporting purposes. Instead, using a service query subject as your report object provides a shortcut to reporting on all dictionaries and fields in the service.

- The Service Bundles folder contains all the service bundles and the child services which were associated to service bundles. These dimensions cannot be joined with any facts or dimensions which are available in the package.

You generally use the dimensions in conjunction with a fact table, to include additional data about the fact in your query or report, or to filter the output of the query or report by detailed criteria.

Facts and Star Schemas

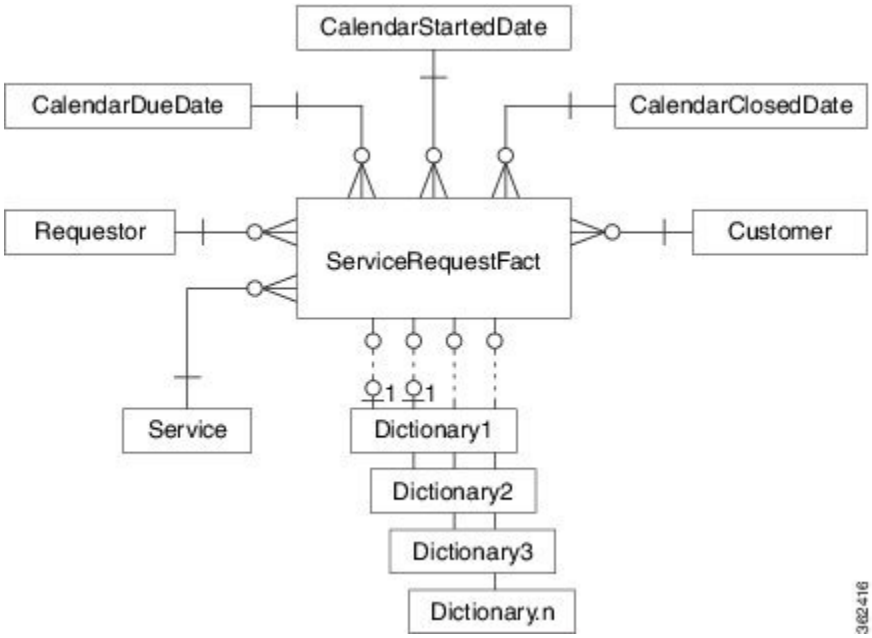
This section describes the facts and star schemas.

Requisitions – ServiceRequestFact

The ServiceRequest fact holds data related to requisition and the requested services. The date and duration attributes that are included in the fact are for the service request and not for the requisition (a shopping cart that can contain multiple requests). This fact includes metrics about the performance—whether the request was in compliance with its SLA, for example, or its actual or estimated duration, as well as links to all dimensional information about the request, including its initiator, the customer and any reportable dictionaries included in the service ordered.

A star schema diagram showing the ServiceRequest fact and related dimensions is shown below.

Figure 13: Service Request Star Schema Diagram



Task-Based Facts

The Service Catalog data mart provides five views of the task-based facts. Two of these views (RequisitionTaskFact and ServiceTaskFact) are provided primarily for backward compatibility with previous versions of Advanced Reporting. They may freely be used; however, they do not contain some metrics and counts which may be useful for many reports.

Each view is optimized by grouping certain sets of tasks. Reports and queries which need to interrogate tasks will perform best if they are based on the task-based fact which best meets the report's requirements.

Task-based facts are summarized below.

Table 2: Task-based Facts

Fact	Usage/Description
All Tasks	All tasks performed during fulfillment of a service request.
Authorization Tasks	All authorization and review tasks.
Delivery Tasks	All delivery tasks, including ad-hoc tasks.
RequisitionTask Fact	All tasks which are performed at the requisition level and not at each service task level. These include financial authorizations, departmental authorizations, and departmental reviews. If sites do not use any of these authorization types, this fact table is empty. This query subject is provided primarily for backward compatibility with previous versions of the Service Catalog data mart.
ServiceTask Fact	Data related to service-level tasks. These include service group authorizations and reviews; service delivery tasks; and ad hoc tasks. This query subject is provided primarily for backward compatibility with previous versions of the Service Catalog data mart.

When creating a report or query, always use the Fact table whose contents best match the type of tasks to be included in the report. Fact table contents are summarized in the table below.

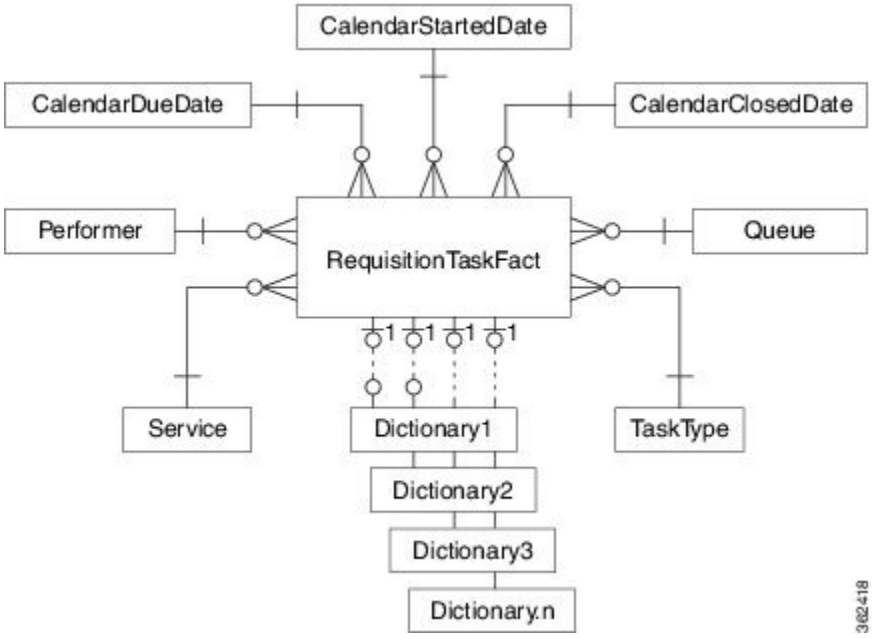
Table 3: Fact Table

	Financial Authorization	Department Authorization	Department Review	Service Group Authorization	Service Group Review	Delivery Tasks	Ad-Hoc Tasks
All Tasks	✓	✓	✓	✓	✓	✓	✓
Authorization Tasks	✓	✓	✓	✓	✓		
Delivery Tasks						✓	✓

	Financial Authorization	Department Authorization	Department Review	Service Group Authorization	Service Group Review	Delivery Tasks	Ad-Hoc Tasks
ServiceTask Fact				✓	✓	✓	✓
RequisitionTask Fact	✓	✓	✓				

The same dimensions are related all task-based facts with the exception of the “Service”, which is not relevant to RequisitionTask facts. A star schema diagram showing the relationships is shown below.

Figure 14: Task-BASED Star Schema Diagram



The ServiceTaskFact and RequisitionTaskFact facts have been deprecated. It is recommended that report designers use other facts to build all custom reports.

Effort Expenditure – TaskEffortEntry Fact

The TaskEffortEntry Fact holds data related the effort expended for each task. Effort entry is available by category, such as labor or material. Since some implementations have opted to not require effort entry, there may be no data available for this fact.

Organizations

The Organizations folder contains information on the groups, organizations, and people configured at the site. Query subjects in this folder cannot be joined with dimensional or fact data, but only with each other. Corresponding query items can be found in query subjects within the Dimensions and Facts folders.

Data Mart Dimensions

All query items (attributes of both facts and dimensions) available in the Dimensions folder of Custom Reports package are summarized in the tables in this section. This list does not include any dictionary or service-based form data, which, of course, will vary from site to site.

Customer

The customer dimension describes the person who is the recipient of the service which was ordered.

The semantics of the query items which comprise this query subject may be modified if custom mappings to Person attributes have been applied as part of directory integration. The descriptions given below are the defaults that are expected by Organization Designer. Some of these fields may be blank, if they are not used at a particular site.

Table 4: Customer Query Table

Query Item	Description
CustomerID	Customer ID
Customer Full Name	Full name of the customer, in First Name Last Name format
CustomerFirstName	First name of the customer
CustomerLastName	Last name of the customer
CustomerOUID	Organizational Unit ID of the customer's home OU
CustomerOUName	Name of the customer's home organizational unit
CustomerBuilding	Building in which the customer is located
CustomerBuildingLevel	Building level/floor on which the customer is located
CustomerOffice	Office of the customer
CustomerCubic	Customer cubicle number
CustomerStreet1	First line of the street address of the customer
CustomerStreet2	Second line of the street address of the customer

Query Item	Description
CustomerCity	City in which the customer is located
CustomerStateProvince	State in which the customer is located
CustomerZip	Zip code of the customer
CustomerCountry	Country in which the customer is located
CustomerLoginName	Login name of the customer
CustomerEmailAddress	Email address of the customer
Work Phone	The work phone of the customer
Cust_SupervisorID	ID of the customer's supervisor
Supervisor Full Name	Full name of the customer's supervisor, in First Name Last Name format
Cust_SupervisorFirstName	First name of the customer's supervisor
Cust_SupervisorLastName	Last name of the customer's supervisor
Cust_SupervisorEmail	Email address of the customer's supervisor
Cust_SupervisorLoginName	Login name of the customer's supervisor
Customer Status	Customer status; valid values are “Active” and “Inactive”

Dictionary

The dictionary dimension may be used to describe the dictionary in which a form field was entered.

Table 5: Dictionary Query Table

Query Item	Description
DictionaryID	Dictionary ID
DictionaryName	Name of the dictionary
DictionaryGroupID	ID for the dictionary group to which this dictionary belongs
DictionaryGroupName	Name of the dictionary group
DictionaryServiceItemFamily	Service Item family name for a particular dictionary

Query Item	Description
Is Reportable	Flag that indicates whether the dictionary is designated as reportable (1) or not (0). Reportable dictionaries will have corresponding query subjects under the "DictionaryData" folder.

Keyword

The keyword dimension may be used to list keywords associated with a particular service.

Table 6: Keywords Query Table

Query Item	Description
KeywordID	Unique identifier for the keyword
Keyword	The word or words by which catalog users can search for services to order

Performer

The performer dimension describes the person who performs a task. This includes delivery, ad-hoc, and authorization/review tasks.

The semantics of the query items which comprise this query subject may be modified if custom mappings to Person attributes have been applied as part of the directory integration process. The descriptions given below are the defaults that are expected by Organization Designer.

Queue

The queue dimension describes the queue to which a task was assigned.

Table 7: Queue Query Table

Query Item	Description
QueueID	ID of the queue to which the task was assigned
QueueName	Name of the queue
Queue Status	Status of the queue – "Active" or "Inactive"
QueueOUID	Identifier of the organizational unit which services the queue
QueueOUName	Name of the organizational unit of the queue
Work Phone	Work phone of the queue
Email Address	Email address of the queue

Requestor

The requestor dimension describes the person who ordered the service.

The semantics of the query items which comprise this query subject may be modified if custom mappings to Person attributes have been applied as part of directory integration. The descriptions given below are the defaults that are expected.

Table 8: Requestor Query Table

Query Item	Description
RequestorID	ID of the person who requested the service
Requestor Full Name	Full name of the requestor, in First Name Last Name format
RequestorFirstName	First name of the requestor
RequestorLastName	Last name of the requestor
Requestor Status	Status of the requestor – “Active” or “Inactive”
Work Phone	The work phone of the requestor
RequestorOUID	Organizational Unit ID of the requestor's home OU
RequestorOUName	Name of the requestor's home OU
RequestorBuilding	Building number/name in which the requestor is located
RequestorBuildingLevel	Building level/floor of the requestor
RequestorOffice	Office of the requestor
RequestorCubic	Requestor cubicle number
RequestorStreet1	First line of the street address of the requestor
RequestorStreet2	Second line of the street address of the requestor
RequestorCity	City in which the requestor is located
RequestorStateProvince	State in which the requestor is located
RequestorZip	Zip code of the requestor
RequestorCountry	Country in which the requestor is located
RequestorLoginName	Login name of the requestor
RequestorEmailAddress	Email address of the requestor

Query Item	Description
Req_SupervisorID	ID of the supervisor of the requestor
Supervisor Full Name	Full name of the supervisor, in First Name Last Name format
Req_SupervisorFirstName	First name of the supervisor
Req_SupervisorLastName	Last name of the requestor's supervisor
Req_SupervisorEmail	Email address of the requestor's supervisor
Req_SupervisorLoginName	Login name of the requestor's supervisor

Service

The service dimension includes a hierarchy (service team, service group, service) for organizing data relating to the service for which a requisition was ordered or a task was performed. Service attributes can be used in conjunction with any fact table to qualify or filter the fact data.

Table 9: Service Item Query Table

Query Item	Description
ServiceID	Service ID
ServiceName	Name of the service
Description	Brief description for the service
ServiceGroupID	ID of the service group to which the service belongs
ServiceGroupName	Name of the service group to which the service belongs
ServiceTeamID	ID for the service team responsible for the service
ServiceTeamName	Name of the service team responsible for the service
ServiceStandardDuration	Standard duration specified in the service definition
ServiceDurationUnits	Units in which the standard duration is displayed
ServiceHoursPerBusDay	Number of hours per business day
EstimatedCost	Estimated cost for the service
PublicationDate	Publication date for the service
ExpirationDate	Expiration date for the service

Query Item	Description
IsInactive	Flag that indicates whether the service is active (0) or inactive (1)
Is Reportable	Flag that indicates whether the service is designated as reportable (1) or not (0). Reportable services will have corresponding query subjects under the “ServiceData” folder
Is Orderable	Flag that indicates whether the service is designated as orderable (1) or not (0)
Price	Service Summary Price

Service Bundles

The Service Bundles query subject provides access to all Service Bundles in the application repository.

Table 10: Service Bundles Query Table

Query Item	Description
Service Bundle ID	Unique identifier for the service bundle
Service Bundle Name	Name of the service bundle
Description	Brief description of service bundle
Service Group Name	Name of the service group to which the service bundle belongs
Service Team Name	Name of the service team responsible for the service bundle
Standard Duration	Standard duration specified in the service bundle definition
Durations Units	Units in which the standard duration is displayed
Hours per Business Day	Number of hours per business day
Price	Service bundle price
Service Bundle Status	Status of the service bundle
Is Reportable	Flag that indicates whether the service bundle is designated as reportable (1) or not (0). Reportable services will have corresponding query subjects under the “ServiceData” folder
Is Orderable	Flag that indicates whether the service bundle is designated as orderable (1) or not (0)

TaskType

The task type dimension may be used to provide the description of a task type.

Table 11: TaskType Table

Query Item	Description
TaskTypeID	Task Type ID
TaskTypeName	Description of the task type

Task types are listed below.

ID	Task Type
0	Delivery Task
1	Financial Authorization
2	Departmental Review
3	Departmental Authorization
4	Service Group Authorization
5	Service Group Review
6	Ad-hoc Task for Delivery
7	Ad-hoc Task for Authorization
8	Ad-hoc Task for Review

CalendarClosedDate

The CalendarClosedDate dimension provides a hierarchy for structuring queries about the date a requisition or task was closed. Using query items in this dimension provides an easier way to filter or group by dates, rather than having to choose a complete date and use an expression to extract, for example, just the month or week you are interested in.

Table 12: CalendarClosedDate Query Table

Query Item	Description
ClosedDateID	Date a task or requisition was closed, in the format YYYYMMDD; for example, 20081225

Query Item	Description
Full Date	Complete date in the format dd-Mon-yyyy; for example, 25-Dec-2008
Day Month Name	The month and day of the month; for example, Dec-25
Week of Year	Week of the year, in the format Weekn-yy; for example Week1-08
Calendar Year Month	Month of the calendar year in yyyy-nn format, where yyyy is a four-digit year and nn is a number between 1 and 12; for example, 2008-12
Calendar Year Quarter	Quarter of the calendar year in yyyy-Qn format, where yyyy is a four-digit year and n is a number between 1 and 4; for example, 2008-Q4
ClosedWeekDay	Day of the week on which the item was closed, where 1=Sunday and 7=Saturday
Day of Week Name	Day of the week (Sunday-Saturday) on which the item was closed
ClosedDateWeekStartDate	Starting date (Sunday) of the week in which the item was closed
ClosedDateWeekEndDate	Ending date (Sunday) of the week in which the item was closed
ClosedDateMonth	Month in which the item was closed
ClosedDateMonthName	Name of the month in which the item was closed
ClosedDateQuarter	Calendar quarter in which the item was closed
ClosedDateYear	Calendar year (YYYY) in which the item was closed

CalendarDueDate

The CalendarDueDate dimension provides a hierarchy for structuring queries about the date a requisition or task was due. The same date formats are available as for the CalendarClosedDate dimension.

CalendarScheduledDate

The CalendarScheduledDate dimension provides a hierarchy for structuring queries about the date on which a task which was allowed a scheduled start date was actually scheduled to start. If no explicit scheduled start date was specified, the scheduled date is the same as the start date.

The same date formats are available as for the CalendarClosedDate dimension.

CalendarStartedDate

The CalendarStartedDate dimension provides a hierarchy for structuring queries about the date a requisition or task was started. This is the actual start date.

The same date formats are available as for the CalendarClosedDate dimension.

Data Mart Facts

The query subjects in the Facts folder provide information about the tasks and service requests logged via the application service catalog.

ServiceRequestFact (Requisitions)

The ServiceRequestFact provides information about services ordered. Folders group metrics for On-Time and Request Status Counts.

Table 13: ServiceRequestFact Query Table

Query Item	Description
RequisitionEntryID	Unique ID for the service request
RequisitionID	Unique ID for the requisition (shopping cart) in which the service was requested
ServiceID	Service ID for the service
Service Bundle ID	Service ID of the service bundle
Requestor ID	Unique ID for the service requestor (initiator of the service request)
Customer ID	Unique ID for the customer (recipient) of the request
Status	Current status of the service request
Quantity	Service quantity that was requested
Price	Price of the service
Started Date	Date the service request was started
Due Date	Date the service request is/was due
Closed Date	Date the service request was closed
Started DateTime	Date and time when the service was requested
Due DateTime	Date and time when the service delivery is due
Closed DateTime	Date and time when the service request was closed
Default Duration	The configured duration required to deliver the service; specified in hours

Query Item	Description
ActualDuration	The actual duration taken to deliver the service
ServiceOntimeFlag	Flag that indicates whether the service request was completed on time (1) or late (0)
ServiceStandardComplianceFlag	Flag that indicates standard compliance for the service request
Completed On-Time Request Count	1 if the current request was completed on time, zero (0) otherwise; count is automatically totaled when requests are grouped on a report
Completed On-Time Percentage	Percentage of requests that were completed on time
Standard Compliance Percentage	Percentage of requests that were completed in compliance with their SLAs
Submitted Count	Number of requests submitted; since requests are not added to the data mart until they are submitted, this will always equal the number of requests
Cancelled Count	Number of requests that were cancelled by the user
Completed Count	Number of requests whose delivery plan has been completed
Ongoing Count	Number of requests submitted but not yet closed
Rejected Count	Number of requests rejected by an approver
Delivery Cancelled Count	Number of requests whose delivery was cancelled by a service manager
Service Request Status	Current status of the service request
Billed Organizational Unit	Organizational unit to be billed for the service
Submitted Date	Date the request was submitted

Task-Based Query Subjects

The All Tasks, Authorizations Tasks, and Delivery Tasks Facts have the same component query items.

- All Tasks provides information about all tasks, including all delivery tasks, reviews and authorizations, performed to complete a service requisition.
- Delivery Tasks provides information about delivery tasks, including ad-hoc tasks.
- Authorization Tasks provides information about reviews and authorizations.

Table 14: Task-Based Query Table

Query Item	Description
Task ID	Service Task ID
Task Name	Name of the service task
Display Order in Service	The order in which the task is executed within the service's workflow
Task Type ID	Type ID of the task
Requisition ID	Corresponding Requisition ID of the task
Requisition Entry ID	Corresponding Requisition Entry ID of the task
Service Bundle ID	Unique ID for the service bundle in which this task is performed, if it was executed as part of a child service
Service ID	Unique ID for the service for which the task is performed; null (blank) for requisition-level approvals, which do not pertain to a particular service.
Performer ID	Unique ID of the performer who performed the task
Queue ID	ID of the queue to which the task is assigned
Status	Current status of the task
Started Date Time	Date and time when the task will be/was started
Due Date Time	Date and time when the task is/was due
Completed Date Time	Date and time when the task is/was completed
Scheduled Date Time	Date and time when the task is/was scheduled to be completed
Planned Effort (Hours)	Planned effort specified for the task in the service definition
Planned Duration (Hours)	Configured duration for the task to be performed, in hours, as specified by the service designer
Actual Duration (Hours)	Actual duration taken for the task as performed, in hours, as calculated by the system, based on the customer's calendar
Performer's Actual Duration (Hours)	Actual duration taken for the task as performed, in hours, as calculated by the system, based on the performer's calendar
Completed Task Count	Indication of whether a task has been completed; 1 if the task has been completed, 0 if it has not

Query Item	Description
Completed On-Time Task Count	Indication of whether a task was completed on time; 1 if the task was completed before its scheduled completion date, 0 if it was not
Completed On-Time Percentage	Percentage of tasks completed on time; for each individual completed task, this is either 100% or 0%; the computation applies as tasks are summarized
Late Open Task Count	Number of tasks still open that are late
Standard Compliance Percentage	Percentage of tasks that were completed within their specified duration

RequisitionTaskFact

The RequisitionTaskFact provides information about requisition-level authorization and review tasks performed to complete a service requisition. This query subject is provided for upward compatibility with legacy systems only; the All Tasks, Service Delivery Tasks, or Authorizations Tasks query subject should be used, as appropriate.

ServiceTaskFact

The ServiceTaskFact provides information about delivery tasks, ad-hoc tasks, service group authorizations and service group reviews performed to complete a service requisition. This query subject is provided for upward compatibility with legacy systems only; the All Tasks, Service Delivery Tasks, or Authorizations Tasks query subject should be used, as appropriate.

TaskEffortEntryFact

The TaskEffortEntryFact provides information about effort expended in the performance of a task.

Table 15: TaskType Table

Query Item	Description
EffortEntryID	Unique ID for the effort entry
ServiceTaskID	Unique ID identifying the task on which this effort was expended
EnteredDate	Date the effort was logged
Description	Description of the effort
Category	The category in which the effort was expended
ContributorID	Person ID of the person who performed the task for which effort entry was required

Query Item	Description
Contributor Full Name	Full name of the contributor in First Name Last Name format
ContributorFirstName	First name of the person who performed the task for which effort entry was required
ContributorLastName	Last name of the person who performed the task for which effort entry was required
EffortQuantity	Number of units of effort expended
EffortCost	Total (extended) cost of the effort entry – unit cost multiplied by quantity
EffortUnitCost	Unit cost of each unit of effort
UnitType	The unit of measure for the effort entry

Organizations Folder

The Organizations folder contains query subjects which allow you to report on organizations, groups, people, and the relationships among these entities. These query subjects cannot be joined to the transactional (fact) data. Instead, you should use the organization or person information in the appropriate dimension—Customer, Performer, or Requestor—to include such items in reports that also include data on tasks or service requests.

Group

Groups provide a container for disparate sets of people or organizations, allowing you to assign permissions or tasks to a single group rather than to the individual group members. To view members of a group, or see the groups with which a person was affiliated, a report could contain items from the Group and Person query subjects.

Table 16: Group Query Table

Query Item	Description
Group Name	Name of the group
Group Status	Status of the group – Active or Inactive
Parent Group Name	Parent of the group
Description	Description of the group

Person

The Person query subjects provides access to all people in the repository, regardless of the role (Customer, Performer, Requestor) they have played in the processing of service requests.

Table 17: Person Query Table

Query Item	Description
Person ID	ID of the person who requested the service
Person Full Name	Full name of the person, in First Name Last Name format
First Name	First name of the person
Last Name	Last name of the person
Home Organization Unit Name	Name of the person's home OU
Building	Building number/name in which the person is located
BuildingLevel	Building level/floor of the person
Office Number	Office of the person
Cubicle Number	Person cubicle number
Street Address1	First line of the street address of the person
Street Address2	Second line of the street address of the person
City	City in which the person is located
State or Province	State or province in which the person is located
Zip or Postal Code	Zip or postal code of the person
Country	Country in which the person is located
Login Name	Login name of the person
Email Address	Email address of the person
Supervisor ID	ID of the supervisor of the person
Supervisor Full Name	Full name of the supervisor, in First Name Last Name format
Supervisor First Name	First name of the person's supervisor

Query Item	Description
Supervisor Last Name	Last name of the person's supervisor
Supervisor Email	Email address of the person's supervisor
Supervisor LoginName	Login name of the person's supervisor

Organizational Unit

The Organizational Unit query subjects provides access to all organizations in the repository.

Table 18: Organizational Unit Query Table

Query Item	Description
Organizational Unit Name	Name of the organizational unit (OU)
Description	Description of the OU
Organizational Unit Typ0e	Type of OU – Service Team or Business Unit
Organizational Unit Status	Status of the OU – Active or Inactive
Parent Organizational Unit	Parent of the OU, if an organizational unit hierarchy has been set up

Service Bundle Folder

The Service Bundle folder contains query subjects which allow you to report on service bundles, associated child service and the relationship among these entities. A service bundle consists of one parent and one or more child services.

Service Bundles

The Service Bundles query subject provides access to all Service Bundles in the application repository.

Table 19: Service Bundles Query Table

Query Item	Description
Service Bundle ID	Unique identifier for the service bundle
Service Bundle Name	Name of the service bundle
Description	Brief description of service bundle

Query Item	Description
Service Group Name	Name of the service group to which the service bundle belongs
Service Team Name	Name of the service team responsible for the service bundle
Standard Duration	Standard duration specified in the service bundle definition
Durations Units	Units in which the standard duration is displayed
Hours per Business Day	Number of hours per business day
Price	Service bundle price
Service Bundle Status	Status of the service bundle
Is Reportable	Flag that indicates whether the service bundle is designated as reportable (1) or not (0). Reportable services will have corresponding query subjects under the “ServiceData” folder
Is Orderable	Flag that indicates whether the service bundle is designated as orderable (1) or not (0)

Service

The Service query subject provides access to all child services which are part of a service bundle.

Table 20: Service Query Table

Query Item	Description
Service Bundle ID	Unique identifier of the service bundle
Service ID	Unique identifier of the parent service of the service bundle
Service Name	Name of the service
Description	Brief description of the service
Service Group Name	Name of the service group to which the service belongs
Service Team Name	Name of the service team responsible for the service
Standard Duration	Standard duration specified in the service definition
Durations Units	Units in which the standard duration is displayed
Hours per Business Day	Number of hours per business day

Query Item	Description
Price	Service price
Display order in Bundle	Display order in the service bundle
Service Status	Status of the service
Is Reportable	Flag that indicates whether the service is designated as reportable (1) or not (0). Reportable services will have corresponding query subjects under the “ServiceData” folder.
Is Orderable	Flag that indicates whether the service is designated as orderable (1) or not (0)

Accessing Custom Reports and Queries

When report designers create custom reports or queries, they may save them either to the Public folders (the Reports folder is the root public folder) or to their private folder (“My Folder”). Reports saved to the private folders are runable/accessible only by the person who developed them.

Reports saved to the public folders are accessible/runable by any person who has a role that allows access to the reports. These inherited permissions can be overridden Cognos Administration options, which allow the Report Administrator to remove permissions to execute a report from the standard roles and assign that permission to any person or custom role that has access to run reports.

In addition to being run from the Reporting module folders, reports are also accessible via hyperlinks. Service designers may embed appropriate links in service descriptions, e-mail notifications or other areas of the application. The format of the link is:

```
http://<CognosServer Name>/crn/cgi-bin/cognos.cgi?CAMNamespace=TrustedSignOn&b_action=xts.run
 &m=portal/report-viewer.xts&method=execute &m_obj=/content//report[@name='<ReportName>']
```

For more information, see Using Reports.