Accessing Financials Reports

Logging On

To log onto the Information Warehouse

1. Start your browser and enter the following URL in the address bar: **www.princeton.edu/iw**.
2. Click on **Enter the Information Warehouse (IW)**.
3. Enter your LDAP userid and password.
4. If the Cognos 8 Welcome page is displayed, click the Cognos Connection link under View Cognos Content to display the Public Folders tab.

Running Existing Reports

The reports you are authorized to view are located in the Public Folders in the Information Warehouse, grouped in packages by application.

1. In the Public Folders tab, click on University Financials - Reports) and select the folder for the type of report you want.
2. Click the name of the report you want to run.
3. Select the parameters that will give you the information you want. Asterisks indicate required parameters.
4. Click the **Finish** button at the bottom of the page to run the report.
5. Use the Page down link at the bottom of the page to go forward from page to page.
6. If you want to save the data in the report, select the format you want (Excel, PDF) by clicking on one of the buttons on the right-hand menu.
7. To re-run the report, click the Run button. The parameters from the current report are saved, so you must remember to deselect them if you want to use different parameters.
8. Click the **Return** button on the header banner to return to the list of reports.

Saving Data as an Excel Spreadsheet

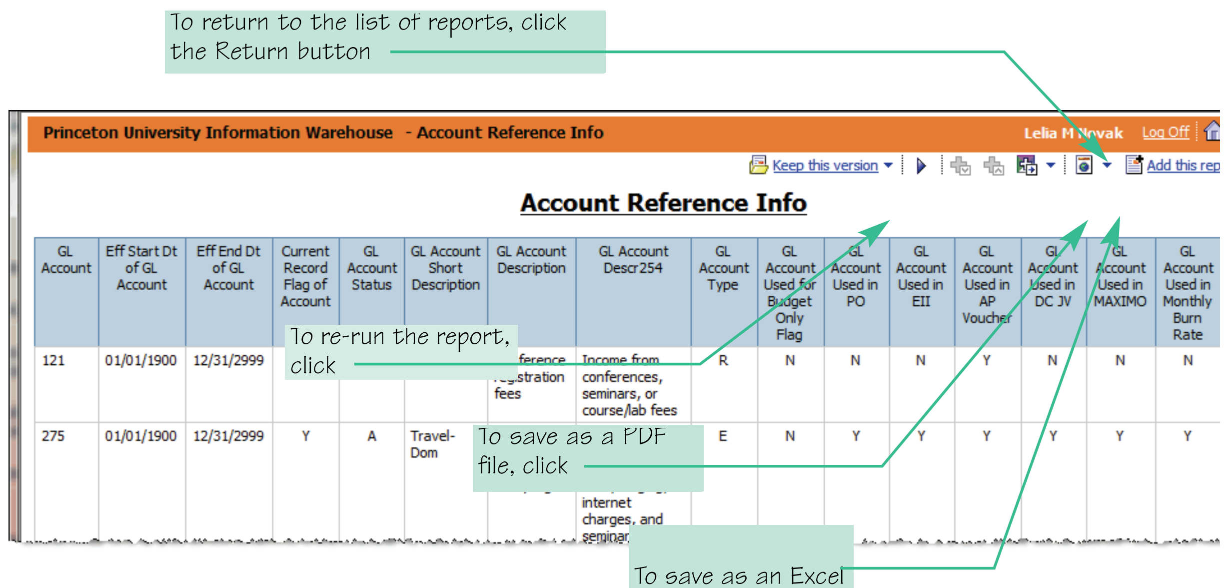
Some reports are generated directly in Excel format, and you will be prompted to open or save the report. Choose the **Save** option, since opening the report in Excel format does not actually create an Excel spreadsheet.

For reports that are displayed in HTML format, you can save the report as an Excel spreadsheet. In either case, you will then need to open the file in Excel.

1. Click the **View in Excel 2000 single sheet format** button.
2. When prompted, click the Save button.
3. Select a folder and enter a filename in the Save As dialog box.
4. You can then open the spreadsheet in Excel by opening Excel, navigating to the location where you saved the file, and opening it.

Note: Before you can perform operations in Excel such as re-sorting, you may need to unmerge cells.

Tip! *If you have already opened the report in Excel format, you can copy the cells, open Excel, and paste them into a spreadsheet.*



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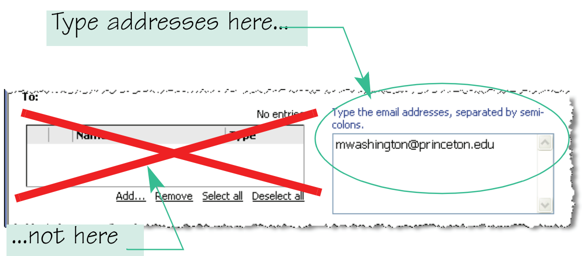
E-mailing a Report

Once you have generated a report, you may send the report by e-mail.

1. On the report page, click the E-mail button.
2. Follow the instructions (in blue) to type the email addresses, *separated by semicolons (;)* in the area under the blue text. Type the complete address, as in **mwashington@princeton.edu**.



Note: Each recipient will see only his or her own address, and there is no CC field.

3. If desired, change the *Subject* line.
4. Type the text of the email in the *Body* field.
5. Click the checkbox in front of *Include the report* to send the report as an attachment. (Including a link to the report sends a link to the Data Warehouse report parameter page for the report.)
6. Click **OK** to send the report.

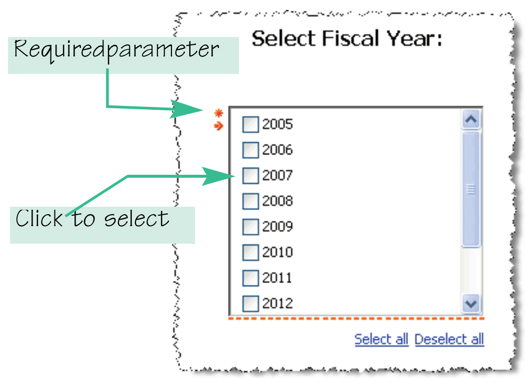
Using Report Parameters

You can control the data that will appear in the report by entering parameters. Available parameters vary from report to report. Some reports have required parameters, which are indicated by a **red asterisk (*)**.

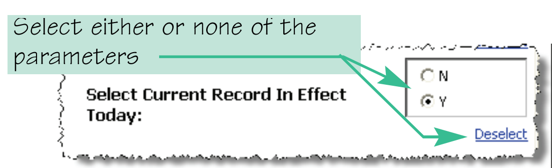
There are several types of parameter prompts:

- Drop-down lists show the available options when you click the down arrow. You can only select one option from a drop-down list.

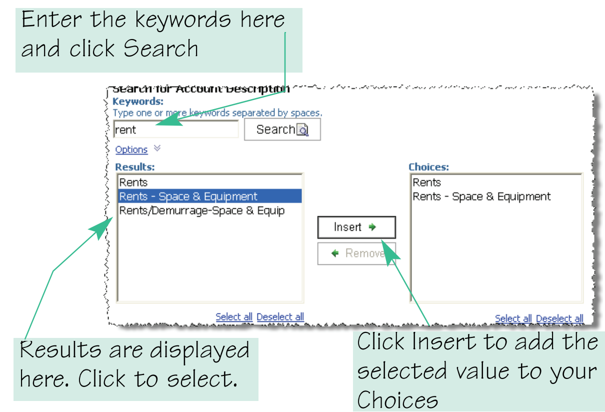
- Option lists show all the available options in a scrollable list, with a checkbox in front of each option. To select an option, click the checkbox. You may select more than one option.



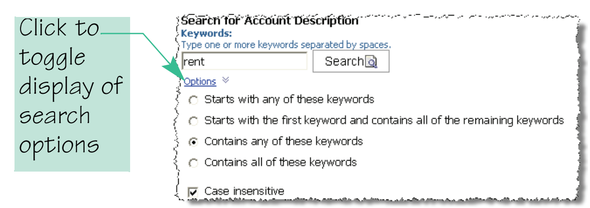
Another type of Select parameter presents you with radio buttons, which are mutually exlusive. You may select one or the other, or Deselect both to not use the parameter, effectively selecting all.



- Search and select fields allow you to enter keywords to search for a particular value. You can then select the value from the Results list and insert it in your Choices list.



By default, the system will search for any value that starts with any of the keywords you enter, but you can change that setting. To change the way the search uses the keywords you enter, click the double arrow next to Options, and select the option you want.



When you have entered all the required parameters, and any optional parameters you choose, click the **Run** button to run the report.

Need help?

Documentation is available at www.princeton.edu/userdocs.

To speak with a Help Desk specialist, call 258-HELP and choose option 3. You may also submit questions to the Help Desk at asahelp@princeton.edu.