

# ePM Quick Reference Guide #080

## ePM Analytics Navigation Basics

### WHAT IS...

Analytics, powered by Cognos ReportNet, is an ePM workspace component whereby users, with permissible security rights, can launch and run one of several ePM Business Intelligence reports.

Through the use of data models pre-loaded into ePM Analytics - Cognos Reports, reports and queries have been authored to report across various document types. All ePM 'Analytics' Reports are developed and designed specifically to fulfill the program's portfolio business requirements of the GSA – ePM system.

In the Proliance Analytics web portal, you can:

- Run existing reports and print reports in various file formats
- Perform administrative tasks, such as scheduling reports
- Personalize the portal to match your preferences
- ePM System Administrator: Create ad hoc reports in Query Studio
- Cognos Administrator: Create ad hoc reports in Query Studio and create complex, formatted reports in Report Studio.

### WHO USES...

- Cognos Administrators
- ePM System Administrators (with Analytics license granted)
- Project Managers (with Analytics license granted)
- Program Managers (with Analytics license granted)

### How To...

#### A. SET UP ANALYTICS LICENSE & WORKSPACE ACCESS

1. Login to ePM as an ePM Administrator to the Organization Workspace > Address Book > Staff.
2. Select the User you wish to grant access to the Analytics Workspace. User must have an assigned license.
3. Select the Account page.
4. Select the Edit button from the toolbar.
5. Expand the Licensing section and select the Analytics option box to enable the Analytics workspace and grant rights for the Staff to access all reports.
6. Save Staff document.

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### B. LAUNCH ANALYTICS WITH EASE

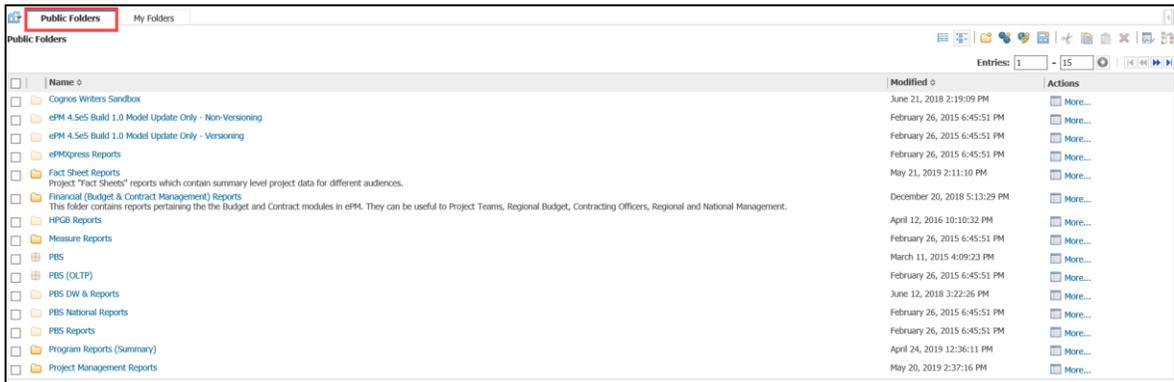
1. From the ePM Portal click on ePM/ePMXpress Reports. The user will be launched automatically into the IBM Cognos Connection main page.



**Note:** Cognos Administrators have the ability to restrict/permit specific reports access per specific user login accounts.

### C. UNDERSTANDING FOLDERS & PREFERENCES

#### Public Folders



The data or reports available from Public Folders are published by the ePM System Administrator. Whether you have access to entries in specific folders or can run or schedule reports depends on your role in the system and the access rules applied to that folder or report.

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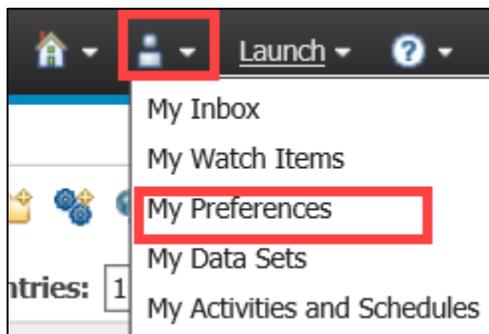
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### My Folders



You control what appears in My Folders as it is specific to your login credentials. The My Folders tab is comprised of reports where you have set a schedule frequency for an existing report or have created your own ad hoc report. Similar to 'Personal' register views, you can copy system reports or create your own ad hoc reports and store them in your My Folders. Additionally, you can schedule reports to run on a frequency setting basis such as daily, weekly, monthly, etc... and at a designated time such as 8AM.

### My Preferences / My Activities and Schedules



Similar to ePM document or register 'Standard' print options, you can set certain preferences for the output of your reports or change the default time zone per your GSA region.

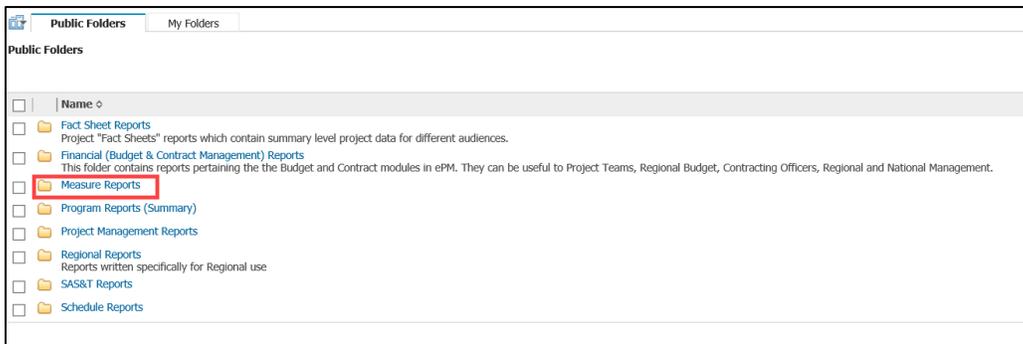
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### D. RUN A PUBLIC REPORT WITH DEFAULT OPTIONS

1. Select the Public folder > Measure Reports > FMSP Measure Reports > FMSP Schedule Measure Detail



2. Click on FMSP Schedule Measure Detail > Select appropriate Report Parameters and click Next.

I do not have access to this report. Can you please snag the screenshots and place them in this document?

**Note:** Reports have different prompt options. Some reports may not require a project selection list as your first option selection.

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3. Select Managing Organization and click Run Report. The report displays an hourglass spinning with a message to indicate it is processing. After processing time has elapsed, the report is displayed.

I do not have access to this report. Can you please snag the screenshots and place them in this document?

### Important

For other reports like Detailed Project Fact Sheet you can use the 'Search' box feature to narrow down your search list. Then, pick your project from the list. For example, the search option example below is looking for all Virginia "VA" specific projects and is case sensitive.

I do not have access to this report. Can you please snag the screenshots and place them in this document?

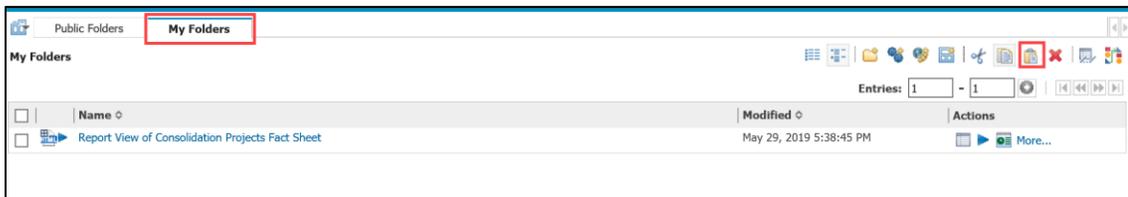
4. After reviewing the displayed report, select the Return icon <<insert Image>> in upper-right corner to return to the Public Folders page.

### E. COPY A PUBLIC REPORT TO MY FOLDERS & RENAMING

1. Select the Public folder and locate the report you want to copy.
2. Click the option box to the left of the report name and click the Copy action located on the toolbar in the right corner of the screen.



3. Browse to My Folders tab and click the Paste action icon.



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4. Select the Set Properties icon to change the report name.



5. Select OK after renaming Report.

**Important:** It is more advisable to create a “Report View” instance of the report rather than copying a Public Report. Report view reports are less strenuous on the server load because the option prompts are pre-filtered up front.

### F. CREATE/RUN A REPORT VIEW

Report Views are reports that have their own properties, such as prompt values, schedules, and results. Use Report Views to share a report specification instead of making copies of it. Also, it is less strenuous on the server usage and generally quicker to execute than running the actual report.

A Report View is typically created after you have defined the prompts and after you run the report. At that time, you realize that you need such a report with the selected parameters and/or needs to be scheduled to run at a specific frequency; daily, weekly, etc..

1. Select the Public folder
2. Run one of the reports in the list by clicking on the name
3. Select the desired prompt values
4. View results of the report by clicking on “Run Report”
5. In the menu toolbar, select the Keep this version dropdown. Select Save as Report View.



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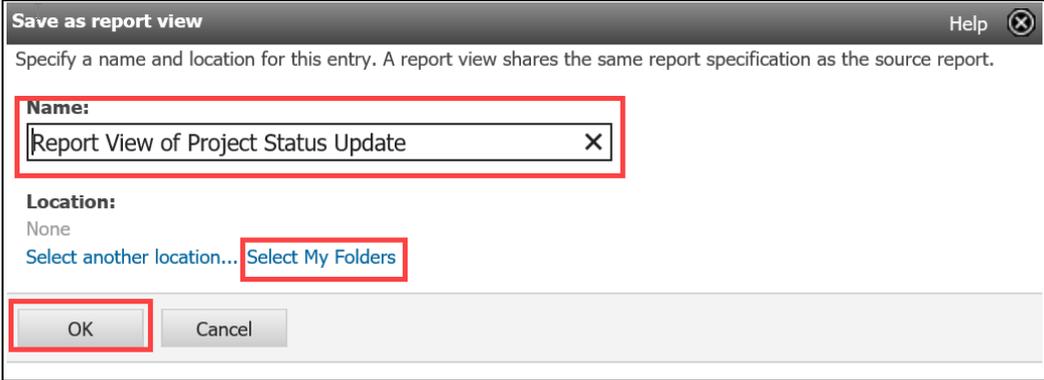
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- Rename the Report View. It is recommended that you name the report based on the option parameters used during execution similar to the discipline of naming ePM register views.

For example:

Public Folder Report Name	My Folder Report View Name
Status of Projects Report	BA51 - Status of Projects Report

- Change the location so the Report View is saved in your My Folders. Click on the Select My Folders link.



- Click OK. After reviewing the displayed report, select the Return icon <<Insert Image>> in upper-right corner to return to the Public Folders page.
- To run the report, browse to My Folders and click on the Report View report you just created. The report will run with the pre-defined prompts (or as scheduled). You will notice the Report View icon is different than of the copied My Folder or original Public Folder reports:

### G. SCHEDULE A REPORT - RUN WITH FREQUENCY OPTIONS

With this report example, you will set the frequency to run every Monday (Weekly) starting on December 1, 2013 through December 31, 2014 scheduled at 8AM. The Run option setting will have your report emailed to you automatically.

- Within the My Folders tab, select the Schedule icon <<Insert Image>> located to the right of the Report of your choice. The Schedule parameters settings appear.
- Modify the Start Date to Dec 1, 2013 .
- Modify the Start Time to 8:00 AM
- Modify the End Date to Dec 31, 2014



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5. Modify the End Time to 5:00 PM
6. Change the Frequency settings to <<Insert Image>>
7. Click the Options – Override the default values. Select PDF or Excel for Formats
8. In the Delivery section, select <<Insert Image>>
9. Click OK to complete the scheduled activity for this report.

**Important**

It is important to rename your report by the frequency settings applied. For example, “Weekly Status of Projects Report”.

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### REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#)

<<add QRG reference(s)>>