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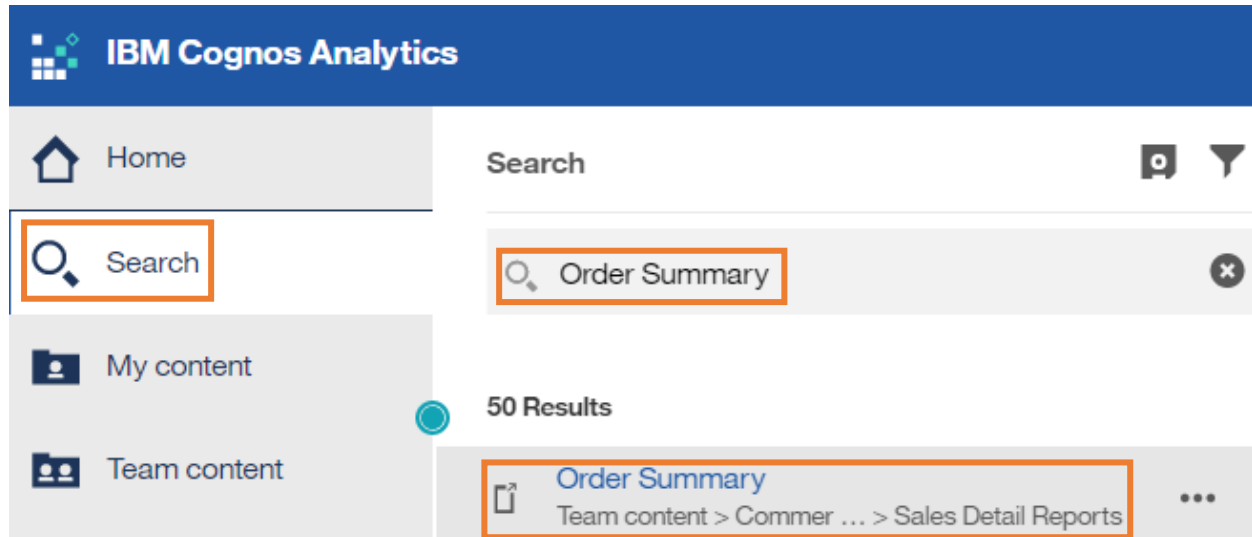
Cognos – Reporting Overview

Updated: December 2021

Running an Order Summary Report

Step 1: Locate Order Summary

Search for Order Summary in Cognos or use this [link](#).
When found, select report to run and prompt for options.



Step 2: Select Search Criteria

Customize your report via the default prompts and filters provided.
Run Orders, Shipments or Backlog report or all 3 in a single pull!
Other filters include product specific information, territory, date selection, and more.

Order Summary Prompts

Limit selections by selecting status, product or region filters, then click "Finish". The only required prompt is "Status", the rest are Optional.

Required:		Optional:	
Select Status: <input checked="" type="checkbox"/> Orders <input type="checkbox"/> Shipments <input type="checkbox"/> Backlog Due Select all Deselect all	Date Selection: <input checked="" type="radio"/> Relative Time <input type="radio"/> Specific Period Relative Time: Current Quarter	Document Category Group <input type="checkbox"/> Contract <input type="checkbox"/> Sales Order Select all Deselect all Service Contracts Renewal Service Contract Renewal	Territory: <input checked="" type="checkbox"/> Sales Territories Deselect all
Product: <input checked="" type="checkbox"/> All Products Deselect all	Product Class: <input checked="" type="checkbox"/> By Product Class Deselect all	UC Account Tier: <input type="checkbox"/> Tier 1 <input type="checkbox"/> Tier 2 <input type="checkbox"/> Tier 3 <input type="checkbox"/> Not Available Select all Deselect all	Distribution Channel <input type="radio"/> Direct Sales <input type="radio"/> Indirect Sales Deselect
UC L02 NGN Keywords: Search by UC NGN Number or click on advanced search and select contains to search by UC NGN Name <input type="text"/> <input type="button" value="Search"/> Options Results: <input type="text"/> <input type="button" value="Insert"/>		UC Number: Keywords: Search by UC Number or click on advanced search and select contains to search by UC Name <input type="text"/> <input type="button" value="Search"/> Options Results: <input type="text"/> <input type="button" value="Insert"/>	

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Step 3: Export

Once all filters have been selected, run report by clicking “Finish” on the top right-hand corner.

This will provide you with an excel export.

Order Summary Prompts

Limit selections by selecting status, product or region filters, then click "Finish". The only required prompt is "Status", the rest are Optional.

Required:		Optional:	
Select Status:	Date Selection:	Document Category Group	Territory:
<div><input checked="" type="checkbox"/> Orders <input type="checkbox"/> Shipments <input type="checkbox"/> Backlog Due</div> <div>Select all Deselect all</div>	<div><input checked="" type="radio"/> Relative Time <input type="radio"/> Specific Period</div> <div>Relative Time: <div>Current Quarter</div></div>	<div><input type="checkbox"/> Contract <input type="checkbox"/> Sales Order</div> <div>Select all Deselect all</div> <div>Service Contracts Renewal <div>Service Contract Renewal</div></div>	<div><input type="checkbox"/> Sales Territories</div> <div>Deselect all</div>

Reports for Territory Analysis

Customer 80/20 Analysis

Identifies and includes insights into the customers responsible for 80% of the business in an assigned territory.

Customer Trends

Quarter over quarter and year over year comparison by customer with variance analysis.

New Customer Hunt

Identifies and includes insights into the customers responsible for 80% of the business in an assigned territory.

RFM (Recency, Frequency, And Monetary)

Quarter over quarter and year over year comparison by customer with variance analysis.

Reports for Product Analysis

Product Trends

Product trends for Shipments, Orders and Backlog Due, grouped by Product Category and Product Group.

SQ Cons. Pull Through Analysis

SQ Consumable & Pull Through summary for current QTR and prior 5 QTRs with the ability to filter by platform.

Library Prep Ratio

Library Prep Ratio for Shipments and Orders, grouped by institution or lab.