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Query Studio Ad Hoc ROSS Reports

Instructor Guide

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For ROSS Steady State
Operations & Maintenance

14.0

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1 COURSE OVERVIEW

This Instructor Guide is used to facilitate conduct of the Query Studio Ad Hoc ROSS Reports training course.

1.1 Course Purpose

The course is designed to instruct students in generating current year ad hoc ROSS Analytical Reports (AR) using the Cognos Query Studio application.

The course focuses on understanding and using the ROSS AR data package, as well as Cognos Query Studio functionality.

1.2 Target Audience

The course is intended for individuals that have the need to generate ad-hoc ROSS reports in Cognos Query Studio using the ROSS AR (Current Year) data package (e.g., GACC Business Leads).

1.3 Course Description

The course combines instructor-led lecture and demonstration with individual and group student practice using the Cognos Query Studio application. The course is divided into units that address related topics, and the units are intended to be taught sequentially. The time required to conduct the course is three (3) days. The first and second days consist of instructor lecture and demonstration, and instructors and students building reports together. The third day involves students working in small groups to 'table-top' report scenarios, and then each student independently building the reports.

1.4 Course Objectives

The following table identifies the course objectives by Unit:

Unit #	Unit Name	Objectives
1	Class Administration	None.
2	Course Overview	None.
3	Report Types	None.
4	Data	1. Identify the ROSS-AR data package elements. 2. Explain the importance of correctly understanding, interpreting, and selecting data. 3. Add data to a report.
5	Creating a List Report	4. Create an ad hoc list report. 5. Save a report.
6	Running a Report	6. Run a report. 7. Modify the appearance of a report. 8. Print and save report results.
7	Manipulating Data in a Report	9. Format report values. 10. Sort report values. 11. Group report values. 12. Calculate report values. 13. Summarize report values.
8	Filtering Report Values	14. Filter report values.

Unit #	Unit Name	Objectives
9	Crosstab Reports	15. Create a crosstab report. 16. Summarize report values. 17. Sort report values. 18. Swap rows and columns. 19. Convert a crosstab report back to a list report. 20. Collapse and expand a group. 21. Create a custom group. 22. Create a report section.
10	Charts	23. Create a chart.
11	Integrated Practice Session	None.
12	Wrap Up	None.

1.5 Presentation Methods

The course consists of lecture, class discussion, and hands-on practice. The focus of classroom activities is on the creation of reports in Query Studio using the ROSS AR data package. A test or practice environment of the ROSS application is used to conduct the course.

Instructors:
- Present course material.
- Demonstrate use of the ROSS AR data package.
- Facilitate class discussions and practice sessions.

The recommended class size is 10 students or less. A single instructor can conduct the course, however at least one additional instructor is recommended.

The Day 1 and 2 practice sessions are designed to facilitate practicing specific ROSS AR concepts and data and Query Studio functionality. The Day 3 Integrated Practice Session focuses on answering more complex reporting questions. The Lead Instructor selects practice session scenarios pertinent to the students.

Important elements in conducting a practice session are the validation and interpretation of report results:
- Validation – The student evaluates whether the results appear reasonable, and match what was expected.
- Interpretation – The student evaluates whether the reporting question was answered, and what other questions could be answered from the report results.

The following training sequence is used for the Day 3 Integrated Practice Session:
- Students work in small groups to 'table-top' the scenario by laying out on paper the steps necessary to complete the scenario, including identifying the following. Instructors assist students as appropriate.
  - The query items, filters, and/or calculations needed on the report.
  - The order in which items are to be added to the report.
  - The expected results of adding each item to the report.
  - How the results will answer the reporting question, and other questions that could be answered from the report results.
- Each student works independently in Query Studio to complete the scenario.

1.6 Student Prerequisites and Responsibilities

The only student prerequisite is a strong knowledge of Standard ROSS Reports.

Students are responsible for performing the following prior to class:
- Reviewing the Quick Reference Card.
- Reviewing the User's Guide.
- Reviewing the Data Dictionary.
- Bringing examples of the reports they typically run.

During class students have the responsibility to:
- Actively participate in class discussions and scenarios.
- Ask for clarification and guidance as appropriate from instructors.
- Maintain an open minded and flexible outlook.
- Take notes on course material as appropriate.
- Complete a Course Evaluation form.

1.7 Instructor Prerequisites and Responsibilities

Instructors shall have:
- Proficiency in the Cognos Query Studio application.
- A solid understanding of the ROSS AR (Current Year) data elements and their relationships.
- Successfully completed the Query Studio Ad Hoc ROSS Reports course.

The lead instructor for the course shall additionally have the following qualifications and skills:
- Taught one Query Studio Ad Hoc ROSS Reports course session under the guidance of a lead instructor.
- Ability to multi-task (working with several students at a time).
- Patience.
- Strong team member.
- Able to accept and adapt to constructive criticism.
- Ability to travel to training locations.

Instructors have the responsibility to:
- Review all instruction materials prior to teaching the course.
- Present course material as assigned by the lead instructor.
- Facilitate class discussions and scenarios.
- Provide clarification and guidance to students as appropriate.
- Communicate problem areas to the lead instructor.
- Know which students they are responsible for, and stay with those students throughout the course.
- Provide feedback to the lead instructor on the progress of their assigned students and on course logistics (e.g., if a particular topic requires clarification; if more time is needed for a particular scenario).
- Ask the lead instructor for clarification on Analytical Reports and Query Studio functionality as appropriate.
- Evaluate student performance during scenarios.
- Ensure all course objectives are covered.

The lead instructor for the course shall additionally have the responsibility to:
- Add students to the AR Package Security for the environment in which training will be conducted (e.g., PRACTICE).
- Assign the material to be presented by each instructor.

- Resolve problems as identified by instructors.
- Select student practice scenarios pertinent to the students.
- Receive feedback from instructors on the progress of their assigned students and on course logistics (e.g., if a particular topic requires clarification; if more time is needed for a particular scenario).
- Provide clarification on Analytical Reports and Query Studio functionality as requested by instructors.

1.8 Classroom and Equipment Requirements

The classroom shall allow a workspace large enough for the lead instructor to spread out the Instructor Guide and students to spread out their Student Workbooks.

The following equipment is required to conduct the course:

- Instructor Guide.
- PowerPoint slides.
- Projector and projection screen for displaying computer screen and PowerPoint slides.
- Computer for the lead instructor and each student, with Internet access, and access to the ROSS AR data package.
- Student Workbook for each student.
- Copy of course slides for each student.

1.9 Student Evaluation

This is not a pass/fail course; however students are evaluated on their ability to correctly generate reports using ROSS AR and Query Studio. Instructors assess student competency during practice sessions. This assessment involves observing students as they:

- Plan the steps necessary to answer the scenario's reporting question(s).
- Develop the report.
- Validate and interpret report results.

At the end of the course, instructors provide students feedback on their abilities and recommend to the lead instructor whether the student should be granted ROSS AR access, or if the student requires additional practice and guidance.

1.10 Course Schedule

The course takes a combined total of approximately 27 hours (including breaks and practice sessions) to conduct. Assuming a nine hour day, with two 15 minute breaks and a one hour lunch, there are 7.5 hours of actual class time per day (22.5 total hours of course class time).

Unit #	Unit Name	Topic #	Topic	Lecture & Demo	Student Practice	Total For Day
Day 1						
1	Class Administration	1–1	Class Administration	0:30	n/a	0:30
2	Course Overview	2–1	Course Overview			
3	Report Types	3–1	Types of ROSS Reports	0:15	n/a	0:45
		3–2	Types of Query Studio Reports			
4	Data	4–1	Data Package Elements	1:00	n/a	1:45
		4–2	Understanding, Interpreting, and Selecting Data			
5	Creating a List Report	5–1	Adding Data to a Report	0:45	n/a	2:30
		5–2	Ordering of Report Items			
		5–3	Missing Data			
		5–4	Saving a Report			
		5–5	Modifying the Appearance of a Report			
6	Running a Report	6–1	Run Report Options	0:30	n/a	3:00
		6–2	View Report Options			
		6–3	Printing and Saving Report Results			
		6–4	Practice Session – List Reports 1	n/a	4:30	7:30
Day 2						
7	Manipulating Data in a Report	7–1	Formatting Report Values	0:45	n/a	0:45
		7–2	Sorting Report Values			
		7–3	Grouping Report Values			
		7–4	Calculating Report Values			
		7–5	Summarizing Report Values			

Unit #	Unit Name	Topic #	Topic	Lecture & Demo	Student Practice	Total For Day
Day 2 (cont.)						
8	Filtering Report Values	8–1	Filter Methods	0:45	n/a	1:30
		8–2	Filter Screens			
		8–3	Combine Filters Screen			
		8–4	Editing a Filter			
		8–5	Resource Assignment Filtering			
		8–6	Filtering Resource Status			
		8–7	Practice Session – List Reports 2	n/a	1:15	2:45
9	Crosstab Reports	9–1	Creating a Crosstab Report	1:30	n/a	4:15
		9–2	Summarizing a Crosstab Report			
		9–3	Sorting a Crosstab Report			
		9–4	Swapping Rows and Columns			
		9–5	Converting a Crosstab Report Back to a List Report			
		9–6	Collapsing and Expanding Groups			
		9–7	Creating a Custom Group			
		9–8	Creating Report Sections			
		9–9	Practice Session – Crosstab Reports	n/a	1:30	5:45
10	Charts	10–1	Using Charts	0:45	n/a	6:30
		10–2	Chart Types			
		10–3	Chart Configurations			
		10–4	Creating a Chart			
		10–5	Practice Session – Charts	n/a	1:00	7:30
Day 3						
11	Integrated Practice Session	11–1	Integrated Practice Session	n/a	7:00	7:00
12	Wrap Up	12–1	Wrap Up	0:30	n/a	7:30

2 COURSE OUTLINE

The following outline identifies the actions, in sequential order, to be performed by the instructor.

2.1 Unit 1 – Class Administration

☑	Instructor Information and Actions
☐	1. Display **Slide QS-01-ROSS-SL** (Query Studio Ad Hoc ROSS Reports).
☐	2. Perform the following: a. Welcome students. b. Introduce instructors. c. Have students introduce themselves. d. Pass around student sign-in sheet.

☑	Instructor Information and Actions
☐	3. Briefly discuss the following: a. Transportation needs (e.g., who needs rides to lunch, hotel, etc.) b. Facilities, including restrooms, drink and snack locations, and emergency exits. c. Class timing: Daily start and stop, breaks, and lunch. d. Telephone number where emergency messages can be left. e. Remind students to clean up their area at the end of class.

2.2 Unit 2 – Course Overview

☑	Instructor Information and Actions
☐	1. Display and discuss **Slide QS-02-ROSS-SL** (Course Purpose).
☐	2. Display and discuss **Slides QS-03-ROSS-SL**, **QS-04-ROSS-SL**, and **QS-05-ROSS-SL** (Objectives).
☐	3. Briefly discuss the **Course Description** (section 1.3 of this document).
☐	4. Briefly discuss the **Presentation Methods** (section 1.5 of this document). Key points: a. Course consists of lecture, class discussion, and hands-on practice. b. Focus of classroom activities is on creation of reports in Query Studio using the ROSS AR data package. c. Days 1 & 2: Instructor and students build reports together.

☑	Instructor Information and Actions
☐	d. Day 3: Students work in small groups to ‘table-top’ report scenarios, and then each student independently builds the report.
☐	5. Briefly discuss the **Student Responsibilities** (section 1.6 of this document). Key points: a. Actively participate in class discussions and scenarios. b. Ask for clarification and guidance as appropriate from instructors. c. Maintain an open minded and flexible outlook. d. Take notes on course material as appropriate. e. Complete a Course Evaluation form.
☐	6. Briefly discuss the **Student Evaluation** (section 1.9 of this document). Key points: a. Instructors assess student competency during practice sessions by observing students as they:

☑	Instructor Information and Actions
☐	• Plan the steps necessary to answer the scenario's reporting question(s). • Develop the report. • Validate and interpret report results. b. At end of the course, instructors recommend whether the student should be granted ROSS AR access.
☐	7. Briefly discuss the **Course Schedule** (section 1.10 of this document).
☐	8. Briefly discuss the **Student Workbook**.

☑	Instructor Information and Actions
☐	9. Elicit and record **student expectations**, and ensure each expectation is met during the course (if within the course scope).

2.3 Unit 3 – Report Types

☑	Instructor Information and Actions
2.3.1 Types of ROSS Reports	
☐	1. Standard. • Accessed via 'Reports Portal' option under ROSS Reports menu. • Pre-defined list of reports. • Viewed in web browser via Cognos Connection. • Can set filter criteria. • Cannot select query items. • Example: List of resources on incidents, by incident, by catalog, by category, by catalog item.

☑	Instructor Information and Actions
☐	• Point out the following: – Standard reports meet as much as 90% of the user community's reporting needs. – Standard reports are addressed in a different course.
☐	2. Current Year Ad Hoc (Analytical Reports). • Create custom reports in web browser via Cognos Query Studio. • Drag and drop query subjects onto a report window. • Can create crosstab reports. • Example: Number of resources on incidents started between 08/01and 08/15 of the current year, by date, by GACC, by Host, and by incident type.
☐	3. Historical Ad Hoc (Analytical Reports Historical). • Current Year Data vs. Prior Year Data (AR Historical). Point out this course addresses ad hoc reports using current year data.

☑	Instructor Information and Actions
☐	• Currently AR (Historical) data includes 2009 to present. Data prior to 2009 must be accessed via DDS. • Comprehensive, up-to-date Data Dictionary is available at: http://ross.nwcg.gov/analytical_reports/ROSS_AR_Data_Dictionary.pdf • Point out the data dictionary will be discussed in detail shortly.
☐	4. User Community Reports folder. • Shared reports stored in 'User Community Reports' folder. – **<u>Open Cognos Connection</u>**. – Before creating report, see if already exists in User Community Reports. – Do not create a new report if there is an existing report that meets your reporting needs. – Emphasize the importance of using existing reports from the User Community Reports folder. Creating a custom report that duplicates a user community report is a waste of time and resources.

☑	Instructor Information and Actions
☐	– Briefly discuss the primary sub-folders in the User Community Reports folder. • Inform students to consider, when developing a custom report, whether the report community could benefit from the report being: – Converted into a standard ROSS report, or – Added to the User Community Reports ROSS-AR folder.

☑	Instructor Information and Actions
2.3.2	**Types of Query Studio Reports**
☐	1. List Report. • Refer students to **QS-01-ROSSR-HO** (List Reports). • Displays data in rows and columns. • All new reports start as list reports. • Can filter, group, summarize, and calculate data.
☐	2. Crosstab Report. • Refer students to **QS-02-ROSSR-HO** (Crosstab Reports). • Displays summary of quantitative information at intersections of rows and columns.

☑	Instructor Information and Actions
☐	3. Chart. • Displays information in graphical form. • Point out list reports will be discussed first. Crosstab reports and charts will be discussed later in the course.

2.4 Unit 4 – Data

☑	Instructor Information and Actions
2.4.1	**Data Package Elements**
☐	1. Opening Query Studio. • **Click 'Launch AR Current' link on the ROSS Reports Portal to open Query Studio**. • Point out there is a ROSS Users Guide section dedicated to using Query Studio, available via the Analytical Reports link on the ROSS home page.
☐	2. Data Package. • ROSS-AR data package. • Open the ROSS-AR data dictionary at: http://ross.nwcg.gov/analytical_reports/ROSS_AR_Data_Dictionary.pdf • Scroll through the Table of Contents and point out how the dictionary is laid out to match the structure of elements in the ROSS-AR data package.

☑	Instructor Information and Actions
☐	3. Subject Areas. • Refer students to **QS-03-ROSSR-HO** (Subject Areas). • Subject Area – Collection of related query subjects (e.g., Incidents). • Point out the icons used in Cognos to represent the data elements. • Independent Subject Areas. – Expand the Independent Subject Areas. – Built to be stand-alone. – Query items may not be combined with those from other subject areas. – Briefly discuss each independent subject area. Point out an example of a subject area description in the data dictionary.

☑	Instructor Information and Actions
☐	– Point out the 'Information' double-arrow button (below the 'Insert' button) can be used to view information about the selected element. – Click Information double-arrow button (below the Insert button). • Integrated Subject Areas. – Expand the Integrated Subject Areas. – Query items from different subject areas can be combined in a single report. – 'Integrated' because relationships exist between the underlying data structures. – Briefly discuss each Integrated Subject Area.
☐	4. Query Subjects. • Refer students to **QS-04-ROSSR-HO** (Query Subjects).

☑	Instructor Information and Actions

☐	• Query Subject – Collection of related query items.
	  – Represents a table in the database.
	
	  – Query Subjects are grouped into Query Areas.
	
	• Expand each query area, one by one, to display its query subjects.
	
	• Identify and briefly discuss the query subjects under each query area.

☐	5. Query Items. • Refer students to **QS-05-ROSSR-HO** (Query Items). • Query Item – Individual item within a Query Subject. – Represents a column of data in a database table.

☑	Instructor Information and Actions
☐	• Expand each query subject, one by one, to display its query items. • Identify and briefly discuss the general types of query items under each query subject.
☐	6. Pre-Configured Filters. • Refer students to **QS-06-ROSSR-HO** (Pre-Configured Filters). • Point out an example of a pre-configured filter. • Point out filters are discussed in detail later.
	2.4.2 Understanding, Interpreting, and Selecting Data
☐	1. Selecting Data. • To correctly answer your reporting question, you must select the right data.

☑	Instructor Information and Actions
☐	• To select the right data, you must understand the data package elements and their relationships. • Emphasize to students that correctly using the data is vital to achieving accurate report results.
☐	2. Interpreting Data. • Your interpretation of the data can also affect your report results. • For example: Do you consider a ‘Reserved’ resource to be ‘Available’, ‘Committed’, and/or ‘Assigned’? This can affect calculation of Days on Assignment (i.e., should ‘Reserved’ resources be excluded, even though they are ‘Assigned’?)
☐	3. Query Items in Multiple Subject Areas. • Some query items exist in multiple subject areas. For example (navigate to each query item): – Inc GACC Org Name in Incidents subject area, and Res GACC Org Name in Resources Subject area. – Inc Name in Incidents subject area, and Inc Name in Resources subject area (Assignment History query subject).

☑	Instructor Information and Actions
☐	• To ensure most robust joins, best to stay within the same subject area. For example: – If building an Incident report, select query items within the Incidents subject area as much as possible (e.g., Inc GACC Org Name). – If building an Assignment History report, select query items within the Resources subject area as much as possible (e.g., select Res GACC Org Name). • Using filters and query items from the ‘other’ subject areas could generate different report results. – For example, if looking for resources that have been assigned to an incident, using Resources > Resources > Res Name would not return the same results as using Requests > Assignment > Res Name. • Continue to emphasize the importance of correctly using data throughout the remainder of the course.

2.5 Unit 5 – Creating a List Report

☑	Instructor Information and Actions
	2.5.1 Adding Data to a Report
☐	1. General Rules. • Want to minimize the data as soon as possible, otherwise putting unnecessary performance strain on system. • Filter query items prior to adding them to the report by right-clicking and selecting 'Filter for report…' – Right-click on a query item & select 'Filter for report…' – **Emphasize the importance of filtering query items before adding them to the report**. This allows the system, when the query item is subsequently added to the report, to retrieve only data that matches the filter criteria, rather than having to retrieve all data associated with the query item. – Point out that the filter screen is discussed later. Click Cancel. • Use a pre-configured filter if possible, allowing drill down towards desired data prior to bringing data to the report. • Insert and filter query items in a 'general to specific' order to limit the amount of data that must be retrieved.

☑	Instructor Information and Actions
☐	For example: – Filter on Inc GACC Org Name prior to inserting Inc Disp Org Name. – Filter on Inc Disp Org Name prior to inserting Inc Name. – **<u>Emphasize that the order in which you insert and filter query items is very important</u>**. Inserting 'Inc Name' and related data without having first reduced the number of dispatches can negatively impact Cognos server performance. This can affect not just Cognos users but all users running applications from that server. This is one of the reasons query studio will only be available to those who have received training. • Always anticipate the effects of adding the next query item, and filter the existing data first if appropriate.
☐	2. Methods of Adding a Query Item – Double-Clicking. • INSTRUCTOR NOTE: This document uses two primary scenarios – the first incident based, the latter resource based – to facilitate demonstrating Cognos Query Studio functionality. However, an experienced instructor can tailor these scenarios, or substitute real-world scenarios, to better match the specific interests, needs, and experience level of students. • Perform the following steps: – Under Integrated Subject Areas > Incidents > Incidents > Organizations, double-click **Inc GACC Org Name**.

☑	Instructor Information and Actions
☐	– Explain that we will filter our results prior to adding more items. Though Filters are discussed in detail later in the course, this opportunity will be used to demonstrate the benefit of a pre-configured filter. ▪ Click in Inc GACC Org Name header. Click toolbar <u>Filter button</u>. ▪ Select two GACCs, preferably with a limited number of incidents relative to other GACCs. Click OK. – Under Integrated Subject Areas > Incidents > Incidents > Organizations, double-click **Inc Disp Org Name**. ▪ Click in Inc Disp Org Name header. Click <u>toolbar Filter button</u>. ▪ Scroll down the list of check boxes. ▪ Point out that the values available for selection in the second filter are unaffected by the values selected in the first filter. ▪ <u>**Click Cancel**</u>. • Explain that it would be easier to use a pre-configured filter, where values available in the second filter are constrained by the first filter. – Pre-Configured Filter – Pre-defined filter within a subject area that allows multiple query item level filters to be set at the same time. – Perform the following steps: ▪ Delete the filter applied to the Inc GACC Org Name column by right-clicking the <u>**filter link**</u> directly above the column and selecting Delete. ▪ Under Incidents Subject Area, double-click **'Inc GACC Org Name / Inc Disp Org Name (Inc)'** <u>pre-configured filter</u>. ▪ Refer students to **QS-07-ROSSR-HO** (Pre-Configured Filter Prompt Screen).

☑	Instructor Information and Actions
☐	▪ In the top field, select the same GACCs as before. Click the Reprompt button. ▪ In the bottom field, select a few Dispatches, preferably with a limited number of incidents relative to other dispatches. Click OK.
☐	3. Methods of Adding a Query Item – Clicking the Insert button. • Under Incidents > Incidents, select **Inc Name** query item. Click Insert button (below menu).
☐	4. Methods of Adding a Query Item – Drag and Drop. • Under Incidents > Incidents, drag and drop the **Initial Date** query item onto the report.
☐	5. Report Items. • Query items added to a report become 'report items'. • In a List Report each report item appears as a column.

☑	Instructor Information and Actions
☐	• To view list of your report items, and their expressions, click Report Definition under Manage File menu link. – Click Manage File link from Menu. Click 'Report Definition…' link. Click OK. • To remove a report item, select heading and click Delete button.
2.5.2 Ordering of Report Items	
☐	1. Ordering of Report Items. • Return to Insert Data menu option. • By default each new item added as next column. – Under Incidents > Incidents, double-click **Inc Type** query item. • Can cut and paste columns; when pasting select column you want the pasted column to go before. – Right-click in Inc Type header and select Cut. – Right-click in Initial Date header and select Paste. • Report Context and Accuracy – Sometimes context or accuracy of report is not realized until certain query items are added.

☑	Instructor Information and Actions
☐	Examples: – Inserting items from Request Documentation query subject, without inserting items such as Incident Name and Request Number, results in display of all documentation, not just that for requests. – Inserting Request Transactions and Documentation. Documentation will not necessarily line up with action it applies to until Request Number is inserted (since documentation is by request, not by transaction).
2.5.3 Missing Data	
☐	1. Missing Data. • Due to Cognos performing an auto summarize on items added to report, may appear there are blank records. • Inserting additional items will allow records to display. • For example: Incident Name, Resource Name, and Assignment Date are inserted. Some incident rows may contain no values.

☑	Instructor Information and Actions
☐	• It is not until Request Number is inserted that you can see some incidents have pending requests that didn't display initially when the query was looking for assignments.
	2.5.4 Saving a Report
☐	1. Saving a Report. • Refer students to **QS-08-ROSSR-HO** (Toolbar Buttons). • 'Saving' a report in Query Studio: – Retains specific set of instructions for extracting particular data. – Does not save results of a particular run. • *Perform only if necessary:* Explain that before saving the report, we want to filter the Initial Date column: – Click in Initial Date header. Click toolbar <u>Filter button</u>. – Set the From Date to the first day of last year. Set the To Date to the last day of this year. Click OK. Click OK on Combine filters screen.

☑	Instructor Information and Actions
☐	• Save and Save As Toolbar buttons. – **Click the Save button**. – **Name the document: ‘<previous year> and <current year> Incidents’**. For example: ‘2012 and 2013 Incidents’. – Set My Folders as location. Click OK.
	2.5.5 Modifying the Appearance of a Report
☐	1. Modifying the Appearance of a Report. • Click on Change Layout menu link. • Refer students to **QS-09-ROSSR-HO** (Change Layout Menu Link). • Click Edit Title Area link. • Changing the appearance of a report does not change its data. • Edit Title Area. – Report title and subtitle.

☑	Instructor Information and Actions
☐	– Show filters check box – Controls whether applied filters display as subtitle. – Show sorts checkbox – Controls whether applied sorts display as subtitle. – Show suppression checkbox – Controls whether applied suppression displays as subtitle. – **Change title to: ‘<previous year> and <current year> Incidents by GACC, Type, and Year’**. Click OK. • Changing Report Item Headings. – Double-click on a column header. Click OK. • Setting Number of Rows per Page. – Click Set Web Page Size link (from Change Layout menu). – Display Number of Rows drop-down list. Click OK.

2.6 Unit 6 – Running a Report

☑	Instructor Information and Actions
	2.6.1 Run Report Options
☐	• Refer students to **QS-10-ROSSR-HO** (Run Report Menu Link). 1. Preview with Limited Data. • Click Run Report menu link. • Click Preview with Limited Data link. • Preview with Limited Data: – Shorter run time. – Good for checking if results are ‘in the ballpark’. – Summarized numbers not correct. – Limited Data page displays with ‘torn-looking’ borders at top and bottom.

☑	Instructor Information and Actions
☐	2. Preview with No Data. • Click Preview with No Data link. • Preview with No Data: – Shortest run time. – Quick view of report - no actual data. – Good when designing or editing report format. – Torn borders indicate results are not complete.
☐	3. Run with All Data. • Click Run with All Data link. • Run with All Data: – Runs report items against entire database.

☑	Instructor Information and Actions
☐	– Longer run time. • On Prompt screen, click OK.
☐	4. Suppression of Duplicate Records. • Query Studio, by default, suppresses duplicate records. • With Documentation query items, for example, this can result in missing rows of documentation. • To ensure all data is returned, uncheck 'Automatically summarize detail values, suppressing duplicates' under 'Advanced Options…'. – Click 'Advanced Options' link. – Click Cancel.

☑	Instructor Information and Actions
2.6.2 View Report Options	
☐	1. View in PDF Format. • TO MINIMIZE AFFECTS ON SYSTEM PERFORMANCE, **<u>ONLY THE INSTRUCTOR</u>** SHOULD PERFORM THE 'VIEW IN PDF FORMAT' ACTION. • PDF – Portable Document Format that is independent of application software, hardware, and operating system. • Like taking a photocopy of each page. • Best method for: – Saving a copy of report results. – Printing the report. – Opens in Cognos Viewer.

☑	Instructor Information and Actions
☐	• Click <u>View in PDF Format link</u>.
☐	2. View in Other Formats. • In Cognos Viewer, click the <u>View button</u> (farthest right button in the toolbar) and display drop-down list. • HTML (HyperText Markup Language) – Best for web pages. – Select <u>View in HTML Format</u>. • XML (Extensible Markup Language) – For transporting structured data to other systems, not for viewing. • Excel – Data displays directly in Excel, in same format as on screen. – Select View in Excel Options and display drop-down list. • CSV (Comma Separated Values) – Data displays in a grid on a webpage, unformatted.

☑	Instructor Information and Actions
2.6.3	**Printing and Saving Report Results**
☐	1. Printing and Saving Report Results. • First view report in PDF format. – Select View in PDF Format. • Use browser Print and Save As buttons. • Close Cognos Viewer. • In Query Studio, click the Save button.
2.6.4	**Practice Session – List Reports 1**
☐	1. Practice Session – List Reports 1. Facilitate the first practice session for list reports.

2.7 Unit 7 – Manipulating Data in a Report

☑	Instructor Information and Actions
	2.7.1 Formatting Report Values
☐	1. Formatting Report Values. • Refer students to **QS-11-ROSSR-HO** (Edit Data Menu Link). • Point out many functions can be accessed in three ways – clicking a toolbar button, right-clicking, and selecting from the menu. • Click in Inc GACC Org Name column header. Click <u>Edit Data link in Menu</u>. Select <u>Format Data</u>. • Text – Can truncate strings by setting number of visible characters. – Display Category drop-down list. Select Text. Click Cancel. • Date and Time. – Right-click Initial Date column header. Select Format Data. – Display Category drop-down list. Select each item in the drop-down one by one. – When done, click Cancel.

☑	Instructor Information and Actions
☐	• Other formatting: Number, Currency, Percentage, and Scientific.
	2.7.2 Sorting Report Values
☐	1. Sorting Report Values. • Refer students to **QS-12-ROSSR-HO** (Sort Screen). • Right-click Inc GACC Org Name column header. – Select Sort. Select Ascending. Click OK. – Point out the sort criteria has been added to the report subtitle. • Right-click Initial Date header. – Select Sort. Select Descending. Click OK. – Point out that the incidents within each GACC now display in order by date. • Sorting Letters – When Cognos sorts letters, it groups values containing all capital letters first, then values containing upper and lower case letters second. This can result in, for example, ‘AIRTANKER 101’ displaying before ‘Aerial Task Force 101’.

☑	Instructor Information and Actions
☐	2. Sorting Request Number. • Refer students to **QS-13-ROSSR-HO** (Sorting Request Number Column). • Must apply 'Req Number Sort Key' item, otherwise for example, A-10 will display before A-2. • Explain we will set up a report on which the Req Number Sort Key would be used. – Click on <u>Insert Data menu link</u>. – Insert **Req Number** from Integrated Subject Areas > Requests > Requests. – Point out an example of request number 10 displaying before request number 2. – Point out that a report can be sorted by a query item, without adding the query item to the report, by right-clicking the query item and selecting 'Sort for report'. – Right-click on **Req Number Sort Key** (also in Requests > Requests) and select <u>'Sort for report…'</u> to add as a sort without adding the query item to the report).

☑	Instructor Information and Actions
☐	– Select Ascending. Click OK. – Point out an example of request number 10 displaying after request number 9. • **Right-click on 'Req Number' sort link in report sub-title and select Delete**. • **Right-click on 'Req Number' column header and select Delete**.
	2.7.3 Grouping Report Values
☐	1. Grouping Report Values. • Used to hide duplicate values. • Cannot group measures. • Click Inc GACC Org Name header. Click Group toolbar button . • Click Inc Disp Org Name header. Click Group toolbar button.

☑	Instructor Information and Actions
☐	• Click Inc Type. Click Group toolbar button. • Point out the Inc Type column has moved to the left. • **Click Save button in Cognos toolbar**.
	2.7.4 Calculating Report Values
☐	1. Calculating Report Values. • Refer students to **QS-14-ROSSR-HO** (Calculate Screen). • Creates new report item for calculation results. • Re-calculates with each report run. • Explain we will perform a calculation on the Initial Date column to create a new column that displays only the year. – Click Initial Date column. Click Edit Data menu link. Click Calculate link.

☑	Instructor Information and Actions
☐	– Display the Operation drop-down list. Select Year. – Click 'New item name' radio button and enter 'Year'. – Click Insert button. • Explain the Initial Date column is no longer needed and can be removed. – **Click in Initial Date column header**. **Click Delete button**. – Point out that we have the option of retaining the column's sort. – **Un-check** the 'Delete the following' check box (i.e., **we want to keep the sort**). Click OK. • **Click Save button in Cognos toolbar**.
	2.7.5 Summarizing Report Values
☐	1. Summarizing Report Values. • Refer students to **QS-15-ROSSR-HO** (Summarize Screen). • Form of calculation that condenses data. • Available summary functions depend on type of data selected.

☑	Instructor Information and Actions
☐	• Does not add a new report item. • Explain we will now summarize the Inc Name column so it will display counts instead of individual incident names – first without a footer and then with. • To demonstrate <u>without footers</u> (Summary for cells): – Click Inc Name. – Click <u>Summarize link (under Edit Data menu)</u>. – Click <u>Advanced link</u>. – Display Summary for Cells drop-down list. ▪ Count – Returns total number of records. ▪ Count Distinct – Returns total number of unique non-null records. – Set Summary for <u>Cells = Count</u>. – Set Summary for <u>Footers = None</u>. Click OK. • Summary for footers. – If you want to apply a summary function to your report, such as totaling numbers, select function from drop-down list. – Adds new ‘footer’ rows to report.

☑	Instructor Information and Actions
☐	• To summarize with footers: – Click Inc Name. – Click Summarize link. – Set Summary for Footers = Total. Click OK. – Click the Bottom button to scroll to the end of the report. • **Rename Inc Name column**: – Double-click Inc Name column header. – **Change to 'Inc Counts'**. Click OK. • **Click Save button in Cognos toolbar**. Explain the final 'Manipulating Data in a Report' topic, 'Filtering Report Values', is fairly large and therefore will be discussed next in its own course unit.

2.8 Unit 8 – Filtering Report Values

☑	Instructor Information and Actions
2.8.1	**Filter Methods**
☐	1. Prefilters. • Explain text, numeric, and date and time data can be filtered. • Many query items are prefiltered views of a database table. • For example, Res Disp Org Name is a view of the Organization table prefiltered to remove all organization types that cannot be the home dispatch of a resource. • When filtering Res Disp Org Name, filter is applied only to dispatches, not to all organizations.
☐	2. Pre-Configured Filters. • Explain that if you intend to select a large percentage of the items in the filter fields, using the pre-configured filter may not be the best option. Due to query differences, the query is significantly faster if you apply custom filters before and/or after adding the items to the report, rather than using the pre-configured filter.

☑	Instructor Information and Actions
☐	3. Right-Click Filtering. • Explain that to demonstrate filter functionality we will begin a new, resource-based report. – Click New Report toolbar button. – Expand the Integrated Subject Areas folder. From Integrated Subject Areas > Resources, insert **‘Res GACC Org Name \ Res Disp Org Name (Res)’** pre-configured filter. • A report can be filtered by a query item, without adding the query item to the report, by right-clicking the query item and selecting ‘Filter for report’. – Open the Resources > Qualifications query subject. – Right-click on **Catalog Name** query item and select ‘Filter for report…’
2.8.2 Filter Screens	
☐	1. ‘Pick values from a list’ Filter Screen. • Three filter screens: ‘Pick values from a list’, ‘Search for values’, and ‘Type in values’. • Filter screen most appropriate for the selected report item automatically launches. • Refer students to **QS-16-ROSSR-HO** (Pick Values from a List Filter Screen).

☑	Instructor Information and Actions

☐	• Ensure <u>‘Pick values from a list’</u> screen is displayed.
	
	• ‘Prompt every time the report runs’ checkbox – Allows filter to be changed with each run.
	
	• ‘Missing values’ link.
	  – Click ‘Missing values’ link and display drop-down list. <u>Leave Default selected</u>.
	
	• ‘Apply the filter to individual values in the data source’ checkbox – Determines whether filter is applied at detail or summary level.
	
	  – Detail filter – Is applied to every record in the database.
	
	  – Summary filter – Is applied only after all detail filters have been applied, so only runs against data in the report.
	
	  – Summary filters are typically used for totals or counts.
	
	  – Explain that the special case of using a summary filter on a non-numeric attribute, resource status, will be demonstrated later.

☑	Instructor Information and Actions
☐	2. 'Search for values' Filter Screen. • Click <u>'Search for values' link</u> (upper right corner). • Refer students to **QS-17-ROSSR-HO** (Search for Values Filter Screen). • Demonstrate how to use each field.
☐	3. 'Type in values' Filter Screen. • Click <u>'Type in values' link</u>. • Refer students to **QS-18-ROSSR-HO** (Type in Values Filter Screen). • Demonstrate how to use each field. • <u>Return to 'Pick values from a list' filter screen</u>. • **<u>Check the Equipment check box</u>**. Click OK.

☑	Instructor Information and Actions
2.8.3	**Combine Filters Screen**
☐	1. ‘Combine filters’ Screen. • Refer students to **QS-19-ROSSR-HO** (Combine Filters Screen). • Used to manage the filters applied to the report. • Point out the screen displays because there is already another filter applied to the report (Res GACC Org Name \ Res Disp Org Name (Res)’ pre-configured filter). • Detail tab – Displays the report filters that are applied to every record in the database – On Combine filters screen, click the ‘AND’ drop-down list and display options (AND, OR). • Summary tab – Displays the report filters that are applied to just the data in the report. – Select Summary tab. – Return to Detail tab.

☑	Instructor Information and Actions
☐	• 'Group' / 'Ungroup' links (bottom right of 'Combine filters' screen). – <u>Multi-select the filters on Detail tab, and click Group link</u> (bottom of screen). – Can group filters to cause them to be applied at the same time. – Necessary if don't want all filters applied to all data. – Example with following filters: Dispatch A, Dispatch B, Aircraft, and Overhead. ▪ For all aircraft and overhead from both dispatches, leave filters ungrouped. ▪ But if want Dispatch A's aircraft and Dispatch B's overhead, must: • Group 'Dispatch A' and 'Aircraft' filters. • Group 'Dispatch B' and 'Overhead' filters. – **<u>Select the grouped filter and click Ungroup link</u>**.

☑	Instructor Information and Actions
☐	• 'Apply NOT' / 'Remove NOT' links. – Select the Catalog Name filter in the grid and click <u>'Apply NOT' link</u>. – Point out how the filter name has changed to include a 'NOT'. • 'Delete' / 'Delete All' links. • 'Add a filter line' link. – Click 'Add a filter line' link (below grid). Click OK. – Explain we cannot add a filter from 'Combine Filters' screen at this time because we do not yet have any report items. • <u>On Combine Filters screen, click OK.</u>
2.8.4	**Editing a Filter**
☐	1. Editing a Filter. • Perform the following actions: – Back on <u>main report screen</u>, click on the <u>'NOT Catalog Name…' filter link in the report sub-title</u>. – On 'Filter (Pick values from a list)' screen, <u>**switch the Condition to 'Show only the following'**</u>. Click OK.

☑	Instructor Information and Actions
☐	– From Resources > Qualifications, right-click on **Category Name** and select 'Filter for report…' – Check the Dozer check box. Click OK. – Click OK on 'Combine filters' screen. – From Resources > Qualifications, select **Catalog Item Name** and click the Insert button. – On the Prompt screen, select **one GACC** & click Reprompt button. Select **one dispatch** & click OK. – Right-click the Catalog Item Name column header and select 'Filter'. – Point out that the catalog item filter is not constrained by either the Catalog Name or Category Name filters, and therefore displays all catalog items, rather than just Dozers. ▪ Explain that if we had intended to filter by catalog item name we would have used the Resources > Catalog Name\Category Name\Catalog Item Name pre-configured filter. – Click Cancel.

☑	Instructor Information and Actions
☐	• Explain that we will save our report before continuing. – **Click Save button in Cognos toolbar**. – **Name the document: 'Resource Status'**. Set My Folders as location. Click OK.
	2.8.5 Resource Assignment Filtering
☐	1. 'Assignment History' Filter. • Refer students to **QS-20-ROSSR-HO** (Resource Assignment Filtering). • Resource assignment information can include either a resource's assignment history (all requests to which resource has been assigned) or current assignment. • When creating an assignment history report involving query items from Resources subject area, a blank row (no assignment information) is displayed for each resource not currently assigned, including those that have never been assigned. • Perform the following actions: – From Resources > Resources, insert **Res Name**. – From Resources > Assignment History, insert **Inc Name**. – From Resources > Assignment History, insert **Req Number**.

☑	Instructor Information and Actions
☐	– Click in Catalog Item Name column header, and click toolbar Group button. – Click in Res Name column header, and click toolbar Sort button . • ‘Assignment History’ Filter. – Apply to suppress the blank row for resources that have been previously assigned. – Predefined filter that does not prompt for filter criteria. – Select the **Assignment History Filter** (Integrated Subject Areas > Resources). – Click the double-arrow icon below the ‘Insert’ button to display description. – Read the description of the Assignment History filter. – Add the Assignment History Filter to the report. – On Combine filters screen click OK. – Point out the effects of applying the filter.

☑	Instructor Information and Actions
☐	2. ‘Exclude Non-Existing Requests’ Filter. • Continue to display **QS-20-ROSSR-HO** (Resource Assignment Filtering). • A ‘Non-Existing’ request occurs when a resource is diverted from an assignment while Mob en Route. • By default, non-existing requests are included in report results when Assignment History filter applied. • ‘Exclude Non-Existing Requests’ filter can be applied to eliminate non-existing request data. • Select the **Exclude Non-Existing Requests filter**. – Click the double-arrow icon below the ‘Insert’ button to display description. – Read the description of the Exclude Non-Existing Requests filter. • **<u>Right-click the Assignment History Filter in the report sub-title, and select Delete</u>**.

☑	Instructor Information and Actions
☐	3. 'Current Status' Filter. • Continue to display **QS-20-ROSSR-HO** (Resource Assignment Filtering). • 'Current Status' filter can be applied to display only current assignment of each resource. • 'Current Status' is a predefined filter that does <u>not</u> prompt for filter criteria. • Previous assignment information is excluded. • Blank row for resources that have never been on an assignment continues to display. • Perform the following actions: – Select the **Current Status Filter** (Integrated Subject Areas > Resources). – Click the double-arrow icon below the 'Insert' button to display description. – Read the description of the Current Status filter. – <u>Add the Current Status Filter to the report</u>.

☑	Instructor Information and Actions
☐	– On Combine filters screen click OK. – Point out the effects of applying the filter. • To suppress resources that have never been assigned, create a 'Not Equal to Null' filter on a report column containing null values for unassigned resources (e.g., Incident Name Not Equal to Null). Perform the following actions: – Filter the Inc Name column. – On the 'Filter (Search for values)' screen click 'Type in values' link. – On the 'Filter (Type in values)' screen, in the large field just to left of Insert button, type following text: NULL. – Click Insert button. – From the 'Condition' drop-down list select 'Do not show the following (NOT)'. Click OK. – On Combine filters screen click OK. – Point out the results of the 'Do Not Show Null' filter. • **Right-click the Current Status Filter in the report sub-title, and select Delete**.

☑	Instructor Information and Actions
☐	4. Non-Inventory Resources. • Once a non-inventory resource's demobilization ETA has passed, resource can no longer be viewed via Resources subject area. • Assignment query items from Requests subject area must be used to obtain data for non-inventory resources no longer on assignment.
2.8.6 Filtering Resource Status	
☐	1. Filtering Resource Status. • Refer students to **QS-21-ROSSR-HO** (Filtering Resource Status). • Remind students that previously we had mentioned a special case in which a summary filter is applied to a non-numeric attribute, Resource Status. • Resource Status is not a single field in the database, rather it is a derived value based on multiple queries. • For performance reasons, 'Res Status' must be filtered at the summary level (i.e., filter only the results returned from detail filters).

☑	Instructor Information and Actions
☐	• From Resources > Resource Status, insert **Res Status**. • Right-click Res Status column header and select Filter. – Set filter criteria to show only At Incident. – **Un-check 'Apply the filter to individual values in the data source' check box**. – Point out that by un-checking the 'Apply the filter to individual values in the data source' check box, the filter was added at the summary level. Click OK. • On Combine Filters screen: – Point out the filter displays on the 'summary' tab. Click OK. • **Click Save button in Cognos toolbar**.
	2.8.7 Practice Session – List Reports 2
☐	1. Practice Session – List Reports 2. Facilitate the second practice session for list reports.

2.9 Unit 9 – Crosstab Reports

☑	Instructor Information and Actions
	2.9.1 Creating a Crosstab Report
☐	1. Creating a Crosstab Report. • Benefits of a crosstab report: – Useful when same rows are displayed for multiple report items. – Swings common rows up to become columns. – Shows measure at intersection of each row and column. – Example: ▪ Our report is currently a List Report: Contains rows for each of the two years, over and over for each GACC, and each incident type within each GACC. ▪ Our report as a Crosstab Report: The rows for either Incident Type or Year will swing up to become columns, greatly reducing number of rows by eliminating redundancy, and providing summaries by year. • Explain we will <u>return to our Incident report to discuss crosstab reports</u>.

☑	Instructor Information and Actions
☐	– Click the Home ('IBM Cognos Connection) button in Cognos toolbar. – Select My Folders tab. – For the '<previous year> and <current year> Incidents by GACC, Type, and Year' report (created and saved earlier in class), click the 'Open with Query Studio' button in the Actions column. – **When prompted, select 2 GACCs and a couple dispatches from each of the selected GACCs**. • 'Pivot (creates a crosstab)' button. – Click Inc Type header. – Click 'Pivot (creates a crosstab)' toolbar button . – Point out that the incident types have now become columns. – Click UNDO toolbar button. – Click Year header. – Click 'Pivot (creates a crosstab)' toolbar button. – Point out that the years and summary have now become columns. – **Double-click Inc Counts column, Rename to 'Incidents'. Click OK**. • **Click Save button in Cognos toolbar.**

☑	Instructor Information and Actions
2.9.2	**Summarizing a Crosstab Report**
☐	1. Summarizing a Crosstab Report. • Cannot summarize non-numerical data. – Click header of one of the year columns. – Click Summarize link (under Edit Data menu). Click OK. Cannot be summarized. – Click the Summary column header. Click Summarize link. Click OK. Cannot be summarized. • Can summarize numerical data. – Click in first cell of one of the Year columns. Click Summarize link. – Explain that in our report incident name has already been summarized into counts. – Click Cancel.
2.9.3	**Sorting a Crosstab Report**
☐	1. Sorting a Crosstab Report. • Sorting non-numerical data – Same as with list reports. – Click in first cell of third Incidents column (incident type). – Click Sort link (under Edit Data menu). – Select Ascending radio button. Click OK. – Point out the incident types now display in ascending order within each dispatch.

☑	Instructor Information and Actions
☐	– Click header of one of the year columns. Click Sort link. Select Ascending. Click OK. – Point out year columns now display in ascending order. • Sorting numerical data (summaries). – Click in the first cell below one of the year column headers. Click Sort link. – Refer students to **QS-22-ROSSR-HO** (Sorting a Summary). – Click Descending radio button. – Display the 'Based on group summaries' drop-down list. – Select Inc Disp Org Name from drop-down. Click OK. – Point out an example of where the entries in the dispatch column have changed order such that they are now descending. • **<u>Click Undo toolbar button</u>**.
2.9.4 Swapping Rows and Columns	
☐	1. Swapping Rows and Columns. • Typically used when there are many more columns than rows.

☑	Instructor Information and Actions
☐	• Click <u>Swap Rows and Columns toolbar button</u> . • Click Swap Rows and Columns toolbar button <u>again</u>.
	2.9.5 Converting a Crosstab Report Back to a List Report
☐	1. Converting a Crosstab Report Back to a List Report. • Clicking the Ungroup button converts a cross-tab report back to a list report. • Select header of one of the year columns. Click <u>Ungroup toolbar button</u> . • Click year column header <u>again</u>. <u>**Click Pivot toolbar button to restore crosstab**</u>.

☑	Instructor Information and Actions
2.9.6	**Collapsing and Expanding Groups**
☐	1. Collapsing and Expanding Groups. • Temporarily removes/restores progressive levels of detail. • Not applicable if report: – Has no numerical data. – Contains a custom group. • No visible indication that report is collapsed. • Click the Collapse Group toolbar button . Click the Collapse Group toolbar button again. • Click the Expand Group toolbar button . Click the Expand Group toolbar button again.

☑	Instructor Information and Actions
2.9.7 Creating a Custom Group	
☐	1. Creating a Custom Group – Individual Values. • Creates a new report item. • Explain that for demonstration purposes <u>we will create two custom groups for incident type – one for wildfires, and one for ‘other’</u>. • Click in first cell of the third Incidents column (incident type). • Click <u>Define Custom Groups link (Edit Data menu link)</u>. • Refer students to **QS-23-ROSSR-HO** (Custom Groups – Individual Values). • Display Customization Type drop-down list. • Individual values. – Select Individual Values.

☑	Instructor Information and Actions
☐	– New group name: ▪ Enter ‘WF’ as New Group Name. Click down arrow. ▪ In ‘Available Values’ field select ‘Fire – Wildfire’. Click left pointing arrow. ▪ Enter ‘Non-WF’ as New Group Name. Click down arrow. ▪ In ‘Available Values’ field click ‘Select All’ link. Click left pointing arrow. – New item name – Enter name for new report item: ▪ Enter ‘WF / Non-WF’. – ‘All remaining values (including future values)’ link – What to do with values not assigned to any of the custom groups. ▪ Click <u>‘All remaining values (including future values)’ link</u>. ▪ Use the individual values as range names (default) – Uses value as header name. Leave default selected. ▪ Do not show range names – No header names display. ▪ New range name – Can specify group name.

☑	Instructor Information and Actions
☐	▪ Click OK. • **<u>Multi-select WF and Non-WF column headers. Click Delete toolbar button</u>**.
☐	2. Creating a Custom Group – Ranges. • Point out that the process for creating ranges is essentially the same as for individual values. • Click in first cell of first year column. Click <u>Define Custom Groups link</u>. • Refer students to **QS-24-ROSSR-HO** (Custom Groups – Ranges). • Ensure <u>Ranges</u> customization type is selected. • Briefly discuss the screen. • Click <u>Cancel</u>.
2.9.8 Creating Report Sections	
☐	1. Creating Report Sections. • Value of selected report item becomes heading of a section.

☑	Instructor Information and Actions
☐	• Click in first cell of first Incidents column (GACC name). • Click Create Sections toolbar button  . • Click Undo button. • Click in first cell of third Incidents column (Inc Type). Click Create Sections toolbar button. Click Undo button. • Click Save button in Cognos toolbar.
2.9.9 Practice Session – Crosstab Reports	
☐	1. Practice Session – Crosstab Reports. Facilitate the practice session for crosstab reports.

2.10 Unit 10 – Charts

☑	Instructor Information and Actions
	2.10.1 Using Charts
☐	1. Using Charts. • Example: If our report was displayed as a column chart, it would be easy to see the years in which the most incidents occurred, as well as which GACCs had the most incidents. • Must have numerical (measures) and non-numerical (non-measures) data. • Can have maximum of two non-measures and unlimited measures. • Charts are created using the most-summarized report data, so consider first: – Removing measures that are not meaningful for chart. – Reordering non-measure columns.

☑	Instructor Information and Actions
☐	– Collapsing groups.
	2.10.2 Chart Types
☐	1. Chart Types. • Click <u>Change Layout menu link</u>. • Click <u>Chart link</u>. • Refer students to **QS-25-ROSSR-HO** (Chart Types and Configurations). • On Chart screen, display Chart Type drop-down list: – Column. – Bar. – Pie. – Line.

☑	Instructor Information and Actions
☐	– Column Line. – Area. – Radar – Combines multiple axes into a radial figure.
	2.10.3 Chart Configurations
☐	1. Chart Configurations. • Continue to display **QS-25-ROSSR-HO** (Chart Types and Configurations). • Chart Configuration radio buttons. – Standard. – Stacked. – 100% – Shows relation of each measure to total

☑	Instructor Information and Actions
☐	– 3D. • Point out that not all configurations are applicable to each type. • Select each Chart Type one-by-one from the drop-down list, and point out the Chart Configurations available for each type.
2.10.4 Creating a Chart	
☐	1. Creating a Chart. • Create a Standard Column chart: – Select the chart Type of ‘Column’. – Select the chart Configuration of ‘Standard’. – ‘Show the values on the chart’ checkbox – Leave unchecked. – Show the following in the report: ▪ Chart and table – Leave selected.

☑	Instructor Information and Actions
☐	▪ Chart only. – Click OK. • Create a Standard Pie chart: – Click Chart link. – Select <u>Pie</u> chart type. – Leave Standard chart configuration selected. – Click 'Show Values on Chart' checkbox. – Click OK. • Remove the chart: – Click Chart link. – <u>Select 'None' as chart type</u>. – Click OK. • Click <u>Save button</u> in Cognos toolbar.

☑	Instructor Information and Actions
	2.10.5 Practice Session – Charts
☐	1. Practice Session – Charts. Facilitate the practice session for charts.

2.11 Unit 11 – Integrated Practice Session

☑	Instructor Information and Actions
☐	1. Integrated Practice Session. Facilitate the integrated practice session.

2.12 Unit 12 – Wrap Up

☑	Instructor Information and Actions
☐	1. Objectives Review. • Congratulate students on finishing the class. • Display **Slides QS-06-ROSS-SL**, **QS-07-ROSS-SL**, and **QS-08-ROSS-SL** (Objectives Review). • Ensure each objective has been met. • Elicit and answer remaining student questions.

☑	Instructor Information and Actions
☐	2. Student Expectations. Review student expectations, and ensure each has been met.
☐	3. Practice. • Explain that to deepen their understanding of ROSS, and refine their user skills, students must keep practicing when they return home. • Point out practice should be performed in the appropriate practice or test environment.
☐	4. Course Evaluation. Request students fill out the course evaluation.

☑	Instructor Information and Actions
☐	5. Workspace Cleanup. Requests students clean up their workspace.

REVISION LOG

Rev #	Date	Revision(s)	Author
14.0	10/09/2018	2.16.12: No updates.	M. Apicella
13.0	01/22/2018	2.16.11 No updates	M. Apicella
12.0	10/06/2017	2.16.10: No updates	M. Apicella
11.0	03/29/2017	2.16.9: No updates	M. Apicella
10.0	01/23/2017	2.16.8: No updates	M. Apicella
9.0	01/17/2017	2.16.7: No updates	M. Apicella
8.0	5/10/16	2.16.6: Updated access to Reports Portal menu item	J. Olson
7.0	02/16/2016	2.16.5: No updates.	C. Dingman
6.0	07/14/2015	2.16.4: No updates.	C. Dingman
5.0	04/23/2015	2.16.3: No updates.	C. Dingman
4.0	09/30/2015	2.16.2: Minor edits for readability throughout	J. Vahl
3.0	12/31/2013	• Updated for Cognos version 10.2. • Added snapshots of buttons. • Updated screen captures in the Handouts document.	J. Vahl
2.0	04/05/2013	• Converted document to new design used with ROSS Analytical Reports Historical Instructor Guide. • Added an objective: "Convert a crosstab report back to a list report." • Moved 'Modifying the Appearance of a Report' topic to 'Creating a List Report' unit. • Moved text regarding User Community Reports folder from 'Creating a List Report' unit to 'Types of ROSS Reports' topic in 'Report Types' unit • Propagated updates to the Student Workbook, Slides, and Handouts. • Added a 'Course Purpose' slide.	J. Vahl
1.0	02/03/2012	• Removed text regarding DDS. • Added text regarding data currently in AR (Historical). • Added text emphasizing importance of not creating reports that already exist. • Added Instructor Note to briefly discuss the primary sub-folders in the User Community Reports folder. • Added example of how using filters and query items from the 'other' subject areas could generate different report results. • Added text regarding emphasizing importance of filtering query items prior to adding them to the report. • Removed all references to 'dragging-and-dropping' report items since it cannot be performed on Federal computer systems. • Added text regarding 'Show suppression' check box on Edit Title Area screen. • Added text regarding formatting report values. • Added text regarding 'Combine filters' screen. • Updated definition of a 'non-existing' request. • Enhanced Instructor Notes and Aids & Cues throughout.	J. Vahl
0.4	09/01/2011	D003.	J. Vahl
0.3	02/19/2011	D002.	J. Vahl
0.2	08/26/2010	D001.	J. Vahl
0.1	05/11/2010	Initial draft.	J. Vahl