Center Folders

Administration Guide

Introduction

With the Cognos upgrade, a folder structure was added to give each dispatch center, GACC and NICC their own folder in which to save reports that are frequently used at the center.

- Easier to find reports

- Everyone in the center can use the same reports

- Reports can be set up with pre-configured prompts

- A standard location for managing scheduled reports for the center

Terminology

Center Folder: A folder designated for saving report content for a specific center (e.g., Dispatch Center or Geographic Area Coordination Center)

Center Folder Administrator: A person who has been granted permissions to manage the content of *Center Folders*. Center Folder Administrator is granted at a Geographic Area level, so a Center Folder Administrator can add/remove content for any Center Folder in the Geographic Area.

GA Administrator: A person who has been granted permissions to manage the *Center Folder Administrator* groups. GA Administrators will also have permissions to add/remove content for any Center Folder, regardless of Geographic Area.

Standard Report: A report that is developed and maintained as part of the ROSS application. These reports are saved under the "Standard Reports (Current)" and "Standard Reports (Historical)" folders.

User-developed Report: A report that has been developed by a user, rather than the application team, using Analytical Reports. *User-developed Reports* include User Community Reports.

Report View: A Report View is a pointer to a report, similar to a shortcut, except that the properties of a Report View can be modified to create a schedule, save default prompt values, and/or set a specific default output type. If the source report for the Report View is modified or moved, the Report View automatically reflects those changes.

Report Shortcut (or Shortcut): A Report Shortcut is a pointer to a report's location. Properties of a Shortcut cannot be modified and Shortcuts cannot be used for scheduling a report. Additionally, if the source report is moved, the shortcut will break. In general, a Report View is a better choice than a Shortcut.

Report Copy (or Copy): A Report Copy creates a new Report object. A Copy is useful if you are intending to make changes to the report or if you want to protect your usage of the report from changes that the report author may make in the future. For Standard Reports, a Report View is generally a better choice than a Copy.

Accessing the Center Folders

Folders are accessible via the "Center Folders" link on the navigation bar
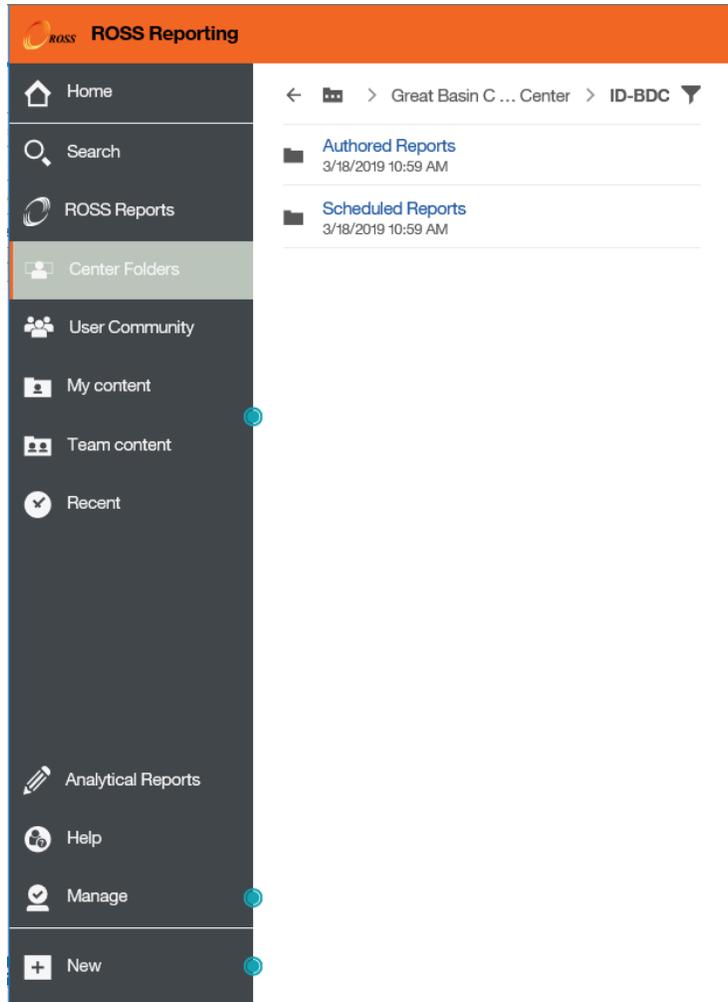
The folders are organized by Geographic Area, plus a folder for the NICC.

Click on a folder name to drill into the next level.

Within each Geographic Area folder, there is a folder for each Dispatch Center, plus a folder for the Coordination Center

Center Folder Contents

The contents of each center's folder will vary. This is a place for each center to set up their own file system for commonly-used reports.
- All Center Folders are created with two standard subfolders
    - Authored Reports
    - Scheduled Reports
- Center Administrators can create additional folders to organize content in a meaningful way

All users will have access to see the contents of all Center Folders
- The Center Administrator does have the ability to 'hide' folders. Hidden folders can only be viewed by other Center Administrators, GACC Administrators or System Administrators.

Only Center Folder Administrators will be able to add/remove content in the Center Folders

'Center Folder Administrator' is applied at the Geographic Area level. This means that a Center Folder Administrator would have access to add/remove content in any Center Folder within the Geographic Area. This allows for a Center Administrator to help other centers with getting their folders set up.

Each center is responsible for ensuring that these folders are maintained by removing items that are no longer used. For example, if you've saved Report Views that are configured for a specific incident, remove those Report Views when the incident is over.

Authored Reports Folder
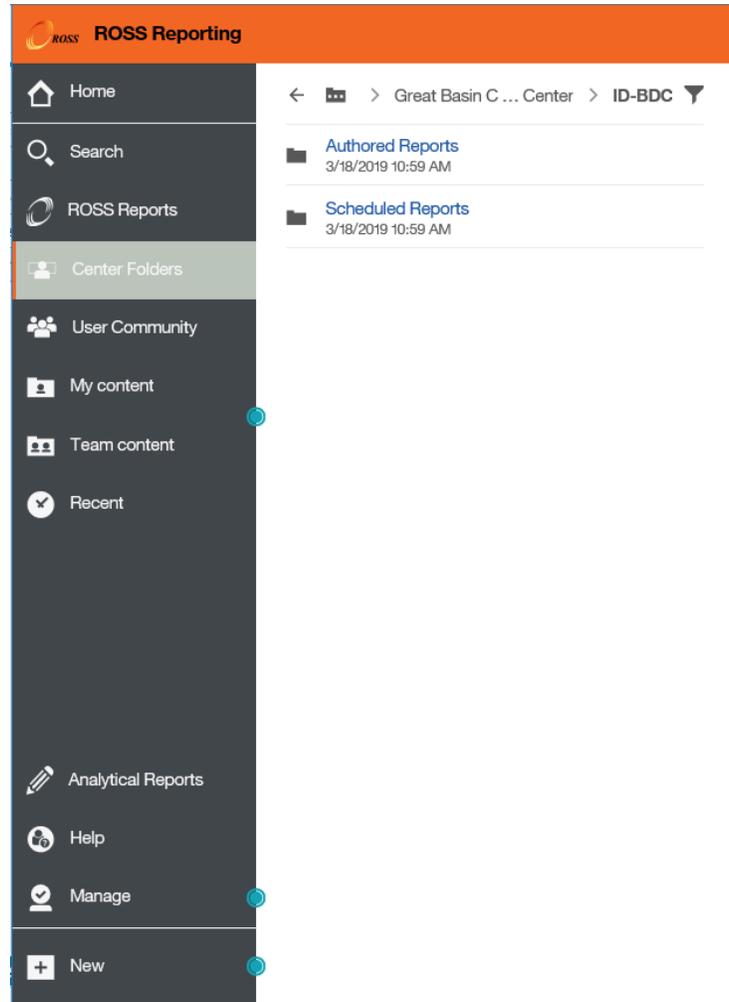
The Authored Reports folder is intended to be a place to save custom reports that have been written using Analytical Reports.

Ideally, reports saved in this folder are 'production-ready', meaning that they are complete and have been validated for correctness of the results. Adhering to this practice makes it easy for other users to know that a report is ready to be used.

Centers may want to create a separate 'Reports in Progress' folder, so that something that is in the process of being developed and tested can be shared with other users during the development phase. However, once the report is ready for general use, it should be moved to the Authored Reports folder so that the status of the report is apparent to all.

Recommendations:
- Hide the 'Authored Reports' folder to keep general users from running reports from this location.
- Create a Report View of the report and save that in the location in the Center Folder where you want users to access the report.
    - Note: You may choose to create multiple report views of your report, each pre-configured with a different set of prompt values.

Scheduled Reports Folder
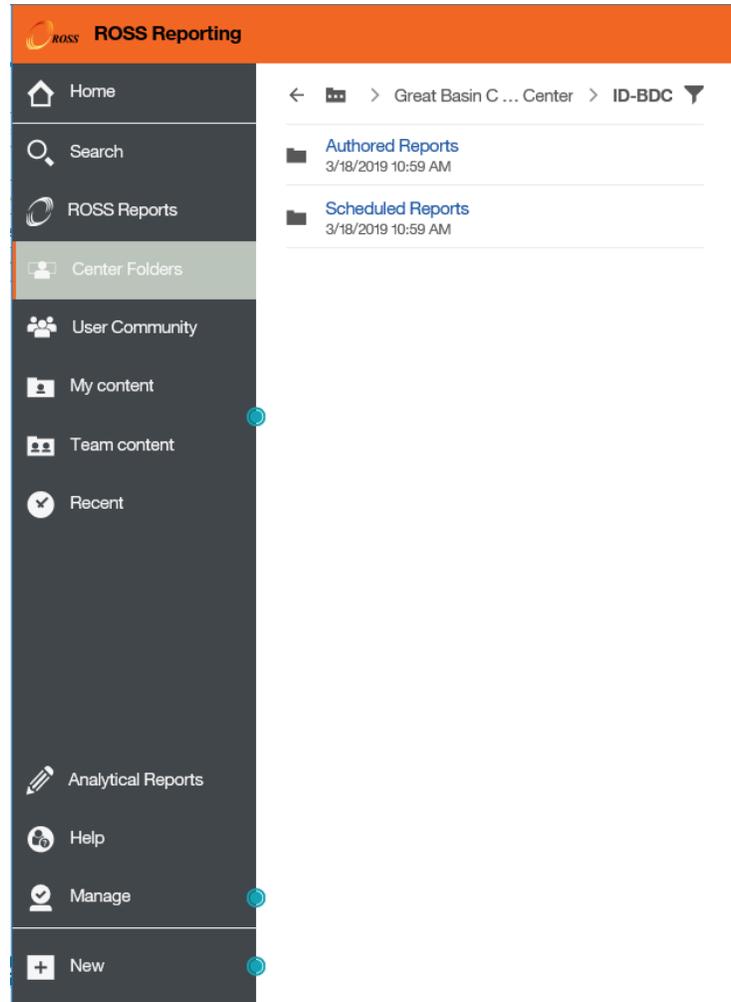
The Scheduled Reports folder is intended to be a place to save Report Views that are configured to run on a schedule. Having a common location for all reports with a schedule will make it easier to find and manage the schedules.

# Creating a Report View with Default Prompts – The Easy Way
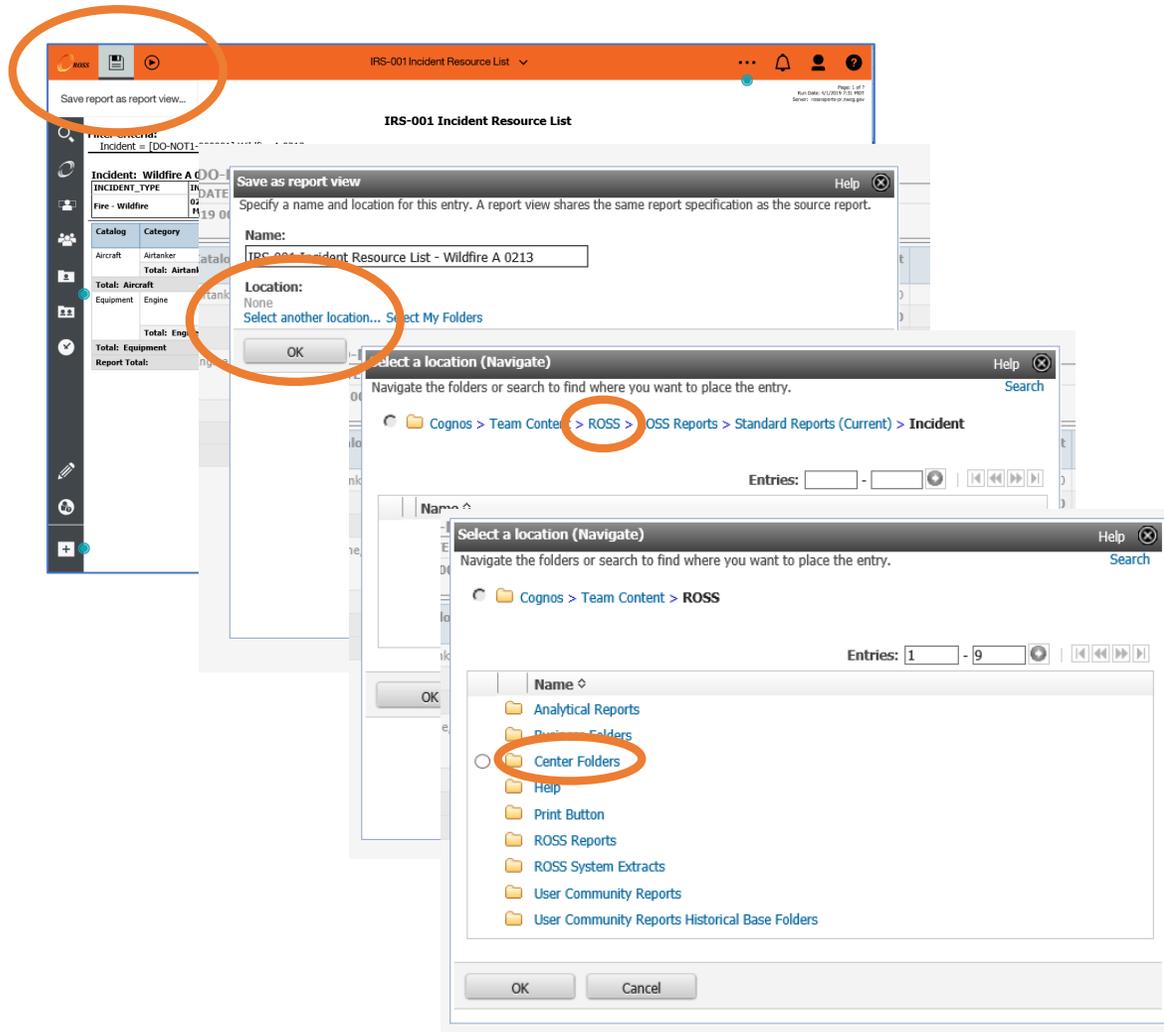
The easiest way to create a Report View with default prompt values customized for your center is to run the report, click the 'Save' icon and select "Save As Report View", then navigate to the location in your Center Folder where you want to save the report.

Example: You want to create a Report View of the IRS-001 Incident Resource List report to always run for the 'Wildfire A 0213" incident.

1. Run the report IRS-001 Incident Resource List. Select the incident name in the prompt.
2. When the results come up, click the Save icon and select "Save report as report view"
3. Update the name to something meaningful. Some suggestions:
    1. Create a naming convention for report names so that things are consistent.
    2. Keep the original report code and name in your Report View name, so that you know what the original report is. Example: "IRS-001 Incident Resource List – Wildfire A 0213" or "Wildfire A 0213 - IRS-001 Incident Resource List"
4. Under 'Location' choose "Select another location…"
    • The Center Folders are under Team Content > ROSS > Center Folders
    • Click on "ROSS" in the breadcrumbs, then navigate to your Center Folder and the folder within that where you want to save the Report View by clicking on folder names
5. Click "OK', then "OK" again.

You should now be able to access your Report View in your Center Folder.

Setting Properties of a Report or Report View
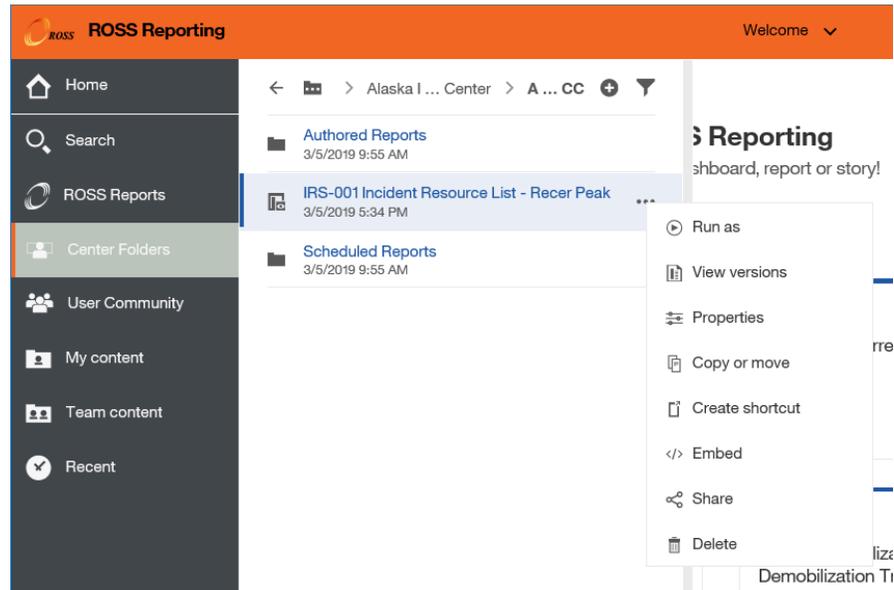
The properties for a Report View, or any Cognos object, can be accessed by clicking on the ellipses (…) that are visible when you hover your mouse over the report name.

When you click on the ellipses, a menu with various options will display, including 'Properties'.

'Copy or move' will be another useful option from this menu.

The ellipses menu options are also accessible from the 'Recent' items displayed on the home page.

Note: Those who are used to working in Cognos 10 probably expected to see "Schedule" in this list. "Schedule" is now a component of "Properties"

Setting Properties of a Report or Report View

The 'Report' tab of the properties has several settings that determine how the report will function when users click on it.

Settings that you may want to use include:

Formats: This will set the default output format for the report. By default, reports will run in HTML. Other options are PDF, Excel, Excel Data, CSV and XML
- **Tip:** The difference between Excel and Excel Data is that Excel will include any formatting of the report such as headers and groupings. Excel Data will produce unformatted output and is most useful when you want to be able to do further work with the data in Excel. (Very similar to CSV output except it produces a .xls Excel file rather than a .csv file.)

PDF Options: These can be used to set the orientation of the output to Portrait (default) or Landscape.

Current Values: This is where you can set/modify the default prompt values that the report will use when users run it.

Default Portal Action: This should be changed to 'Run the Report' if you want the user to see the prompt page (even if they don't change anything) and then run the report.
- If this is set to 'View the report' the report will open up with no prompts. If there are saved output versions, the user will see the last saved version and not the current results.
- Query Studio reports will also have the option to 'Open with Query Studio'. This means that the report will open in a new tab in edit mode when clicked on by a user with Query Studio access.

Rows per page in HTML Reports: If your report is set to generate in HTML, you may want to increase this number to display more results per page. The default value is 20.
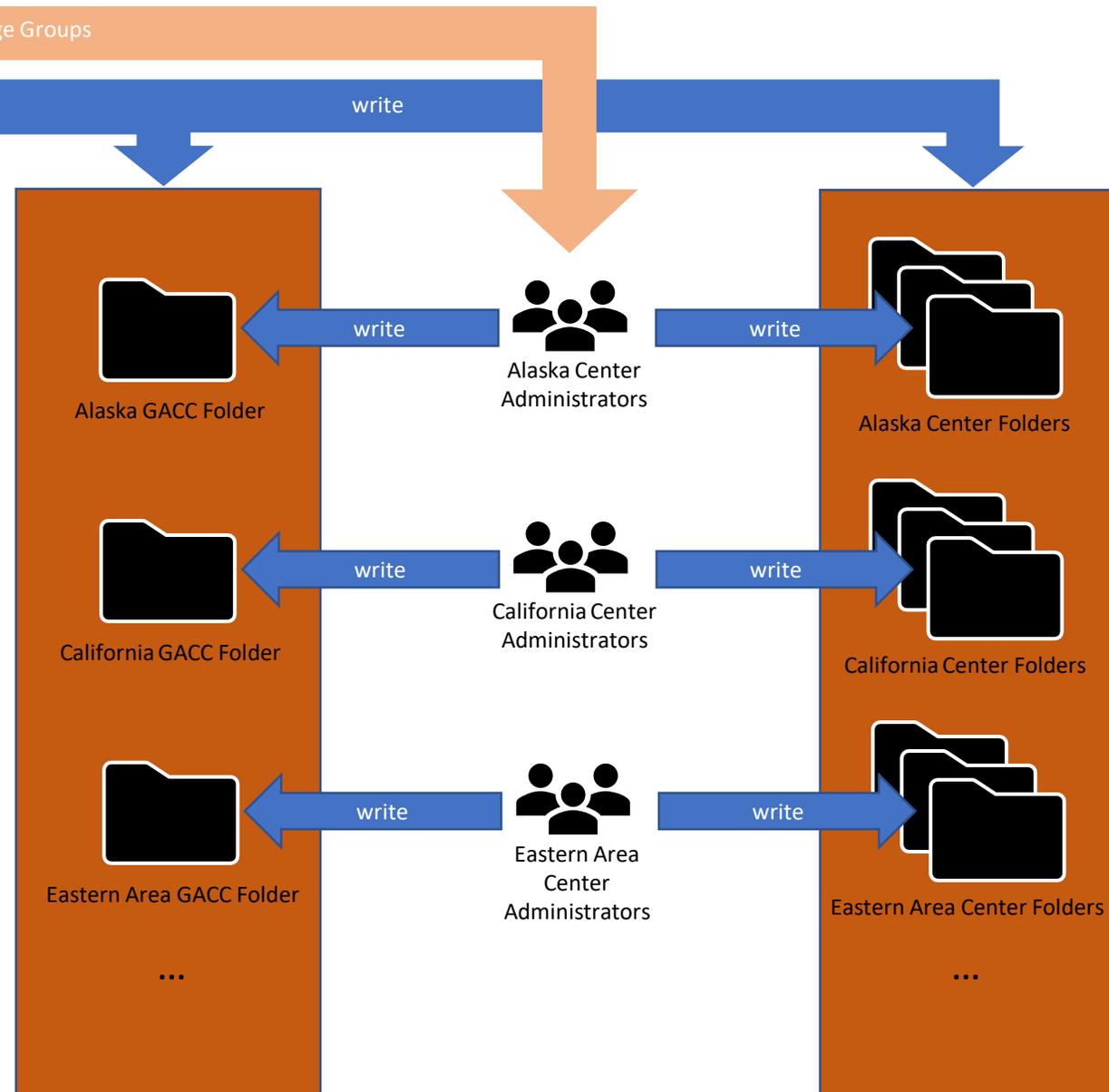
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Geographic Area Administrators

Manage Groups

write

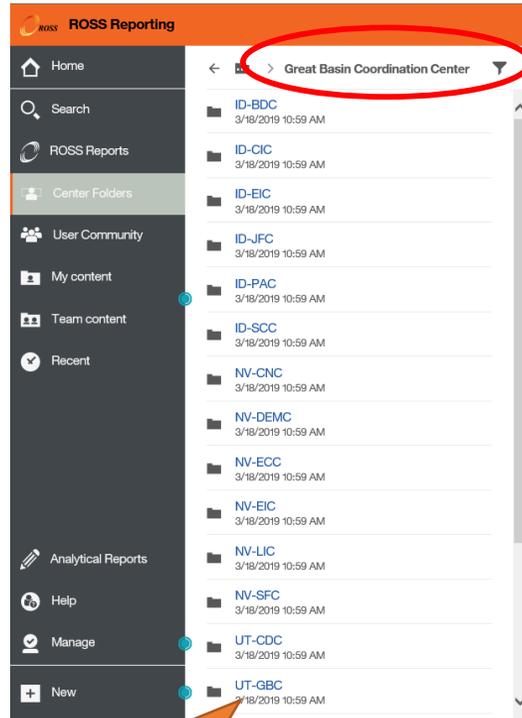**Users with 'Manage Groups' access can do the following:**
- Add users to any Center Administrators Group
- Remove users from any Center Administrators Group

Users with 'write' access can do the following:
- Save to the indicated folders
- Delete from the indicated folders
- Create new subfolders in the indicated folders

Alaska GACC Folder

write

Alaska Center Administrators

write

Alaska Center Folders

California GACC Folder

write

California Center Administrators

write

California Center Folders

Eastern Area GACC Folder

write

Eastern Area Center Administrators

write

Eastern Area Center Folders

...

...

Folder Management

Geographic Area Folders

The designated Geographic Area Administrator is responsible for ensuring that the top-level contents of the Geographic Area folder are kept organized and up to date

- Add a new folder (and standard subfolders) when a new dispatch center is created
- Consolidate center folders when dispatch centers are combined
- Remove a center folder when a center is decommissioned
- Ensure that miscellaneous files are not getting saved to the top-level folder

The GACC will have its own Center Folder within the Geographic Area Folder
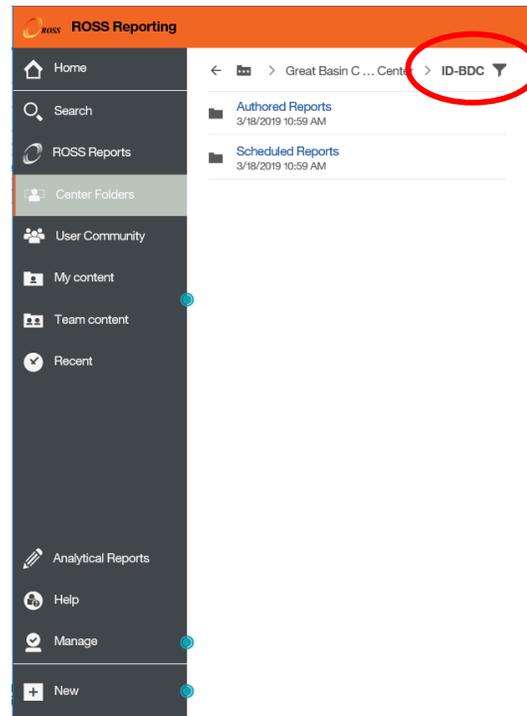
Center Folders

The designated Center Administrator is responsible for ensuring that the contents of their Center Folder are kept organized and up to date

- Remove reports/report views that are no longer used
- Organize content in a way that makes it easy for your users to find the report that they need quickly
- Set up report views with prompts pre-configured so users don't need to select prompt values
- Only save content that you want to make available to other users for regular use (remember that you can temporarily share items with other users via the Reports Transfer folder)

Managing Permissions
Applies only to Geographic Area Administrators

Geographic Area Administrators will have a "Manage" option in the navigation bar.
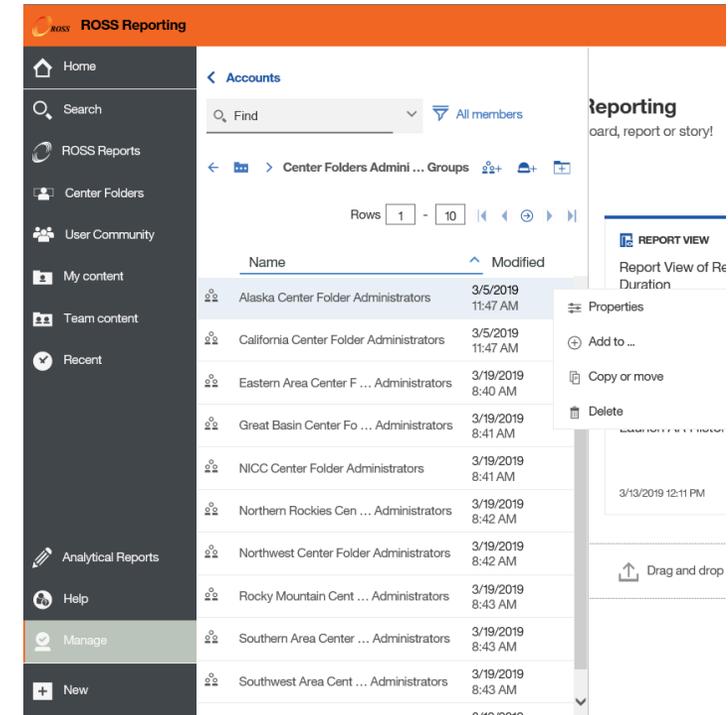To grant/revoke Center Folder Administrator permissions, click on "Manage" then select "Accounts"
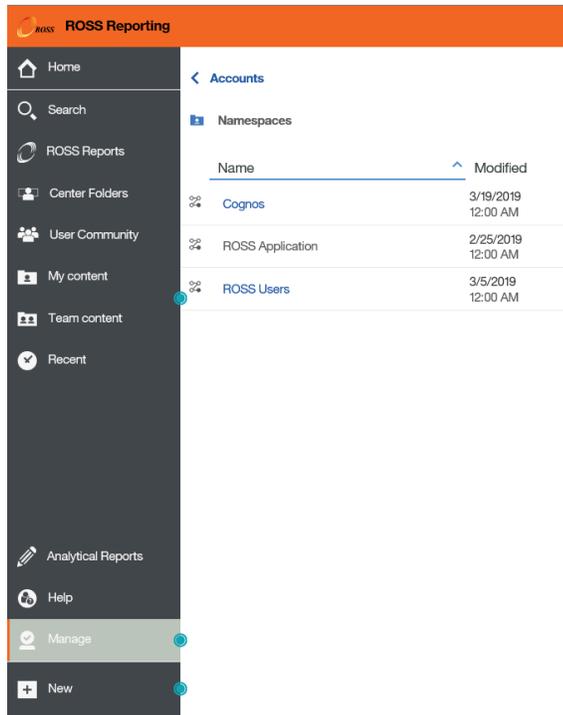
Click on "Cognos", then "Custom Groups", then "ROSS Groups"

At this point, you should see the folder "Center Folders Administration Groups"
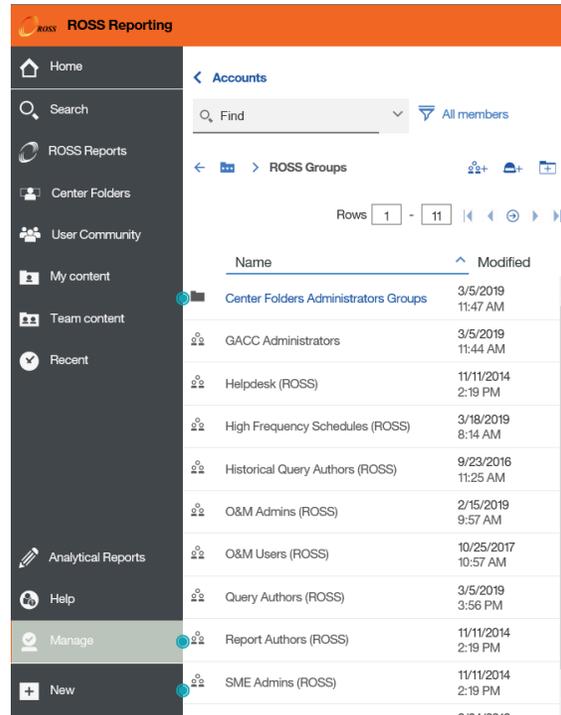
Mouse over or click on the group that you want to add a member to and click on the ellipses (…)

Click on "Properties"

Managing Permissions (cont'd)
Applies only to Geographic Area Administrators

On the "Members" tab of the properties pane, click on the "+" sign to add a member to the group.

On the "Add members" pane, click on "ROSS Users"

Managing Permissions (cont'd)
Applies only to Geographic Area Administrators

In the search box, type the name or user id of the user you want to add, then press 'enter'. Select the correct user from the list of results and click the "Add" button.

You will get a confirmation message and the user will appear in the list of members

The default search type is "Contains the exact string". Other search types can be selected by clicking on the pointer next to the search box.

Click to select

When the user's name appears in this list, they have been successfully added to the group.