Reports - running and scheduling reports

This ROSS User Guide explains how to run Standard and User Community Reports available in ROSS Reports via the ROSS Reports Portal. Topics include:

- Getting started
- Working with Standard Reports
- Working with User Community Reports
- Saving report results in another output format
- Scheduling Report Views
- Troubleshooting.

The ROSS Reports Portal is the gateway to all available Standard and User Community Reports.[1]

Getting started

The section explains basic information you need to access ROSS Reports, including:

- Logging on
- Logging off
- Setting up your default time preference
- Viewing reports in List View or Details View.

Logging on

You have two options for logging on to ROSS Reports:

- From ROSS you will go directly to the ROSS Reports Portal.
- From the Internet you will bypass ROSS and go directly to the Public Folders Portal. From here, drill down to the ROSS Reports Portal.

To log on to ROSS Reports from the ROSS application

- Select **Reports** at the menu bar then click **Reports Portal**.

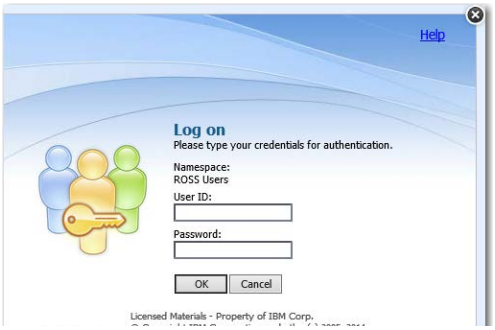
1.This document is based on information, concepts, and instructions available in, "IBM Cognos Connection Version 10.2.1.1: User Guide." © Copyright IBM Corp. 2005, 2013.

To log on to ROSS Reports from the Internet

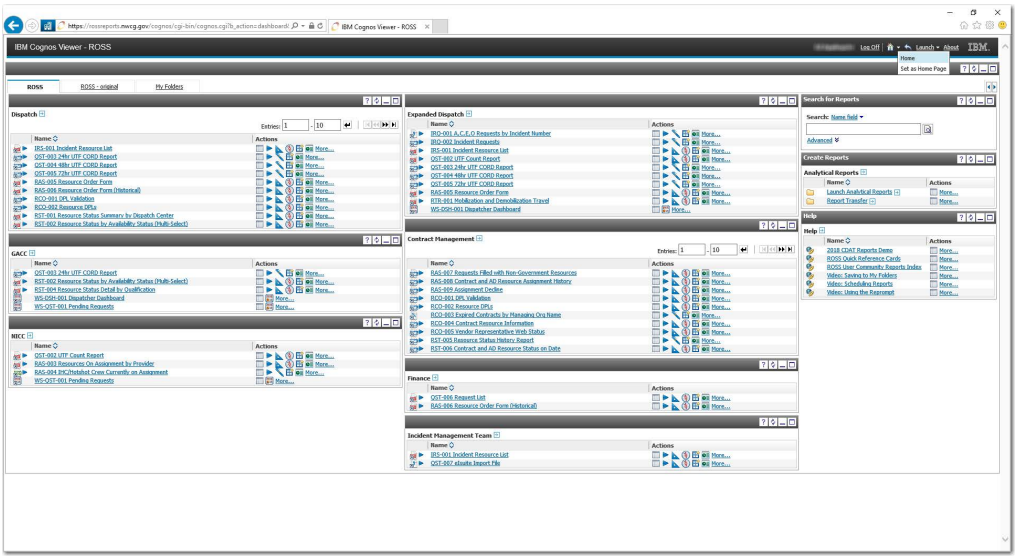
1. Start your Internet browser.
2. In the **Address** bar, type https://rossreports.nwcg.gov/.
3. In the **User ID** text box, type your **Standard NAP User Account Name**.
4. In the **Password** text box, type your **NAP Password**, and then click **OK**.
5. On the **Public Folders Portal**, click **ROSS**.
6. On the **Public Folders > ROSS Portal**, click **Portal Pages**.
7. On the **Public Folders > ROSS > Portal Pages Portal**, click **ROSS**.

Note: *To set Home page to a desired location while on that page click arrow next to the home Icon and select Set as Home Page.*

The following graphic shows the Log on dialog box.



ROSS Reports Portal page



Logging off

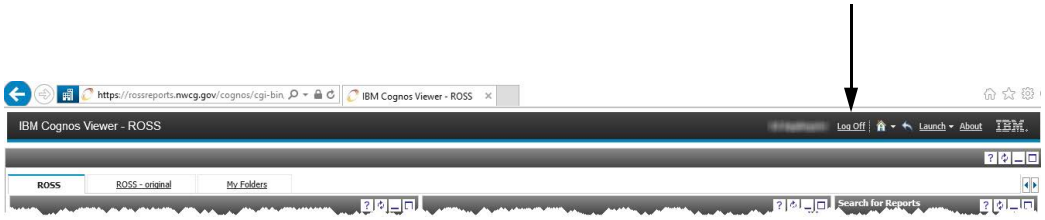
Logging off will end your session in ROSS Reports. Closing your Internet Explorer window will also end your session.

To log off ROSS Reports

1 On the **ROSS Reports Portal** page, click **Log Off**.

2 Close Internet Explorer.

The following graphic shows the ROSS Reports Portal page. The arrow points to Log Off.



Setting your default time zone preference

The time zone determines when any scheduled reports will run. Be sure to specify the correct time zone for your area and needs.

To set your default time zone preference

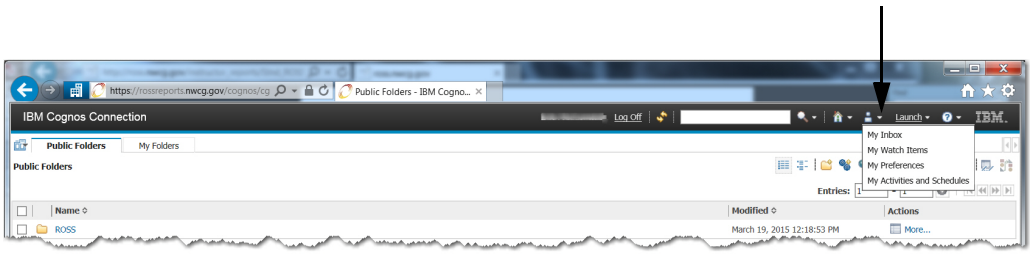
1 On the **ROSS Reports Portal** page, click the **Home** icon.

2 **IBM Cognos Connection** toolbar, click the **My Area Options** drop-down arrow, and then click **My Preferences**.

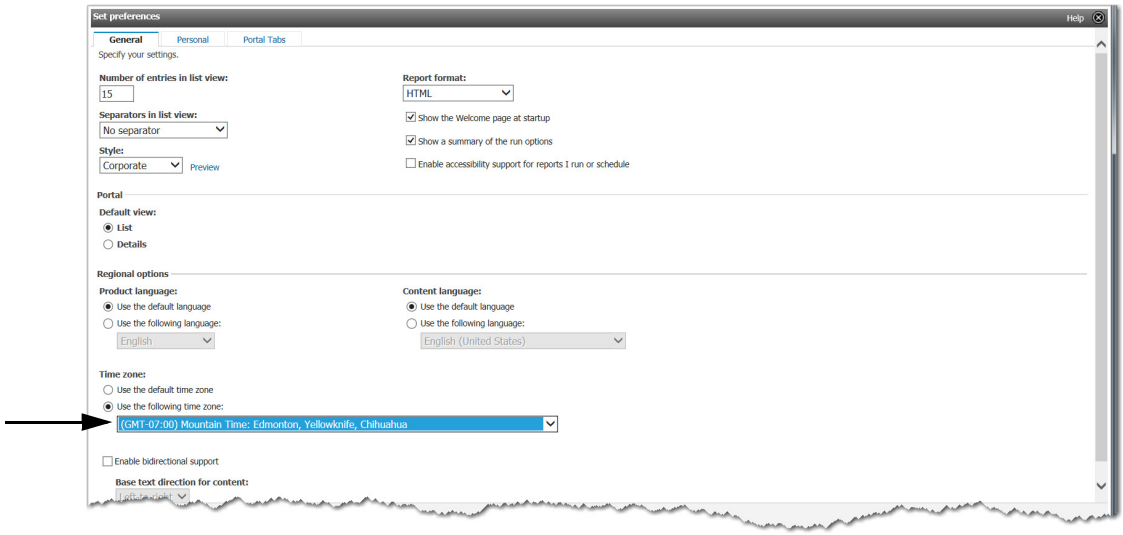
3 Under **Time zone**, perform the following

- click **Use the following time zone**
- click the **Time zone** drop-down arrow, and then click the **Time zone** of your choice then click **OK**.
- *If My Area Options is not visible click on any small blue arrow to expand a panel. The icon will appear next to the Home Icon.*

The following graphic show the IBM Cognos Connection toolbar. The arrow points to the My Area Options drop-down arrow.



The following graphic shows the Set preferences screen. The arrow points to the Time zone field.



Viewing reports in List View or Details View

The first two buttons on the toolbar allow you to customize the information displayed in ROSS Reports:

- List View, the first button on the toolbar, displays Folder Names and Report Names only. List View is useful when you are familiar with the reports that are available.
- Details View, the second button on the toolbar, displays Folder Names, Report Names, and descriptions. Details View is useful when you need more information before choosing which report to run. Details View also completes the Description box when you create a shortcut or Report View.

To view Folder Names and Report Names

- On the toolbar, click the **List View** button.

The following graphic shows the Public Folder > ROSS > User Community Reports Portal page in List View. The arrow points to the location of the List View button.

To view Folder Names, Report Names, and descriptions

- On the toolbar, click the **Details View** button.

Working with Standard Reports

Standard Reports provide quick and easy access to critical information in support of national management functions and decision-making. Topics in this section include:

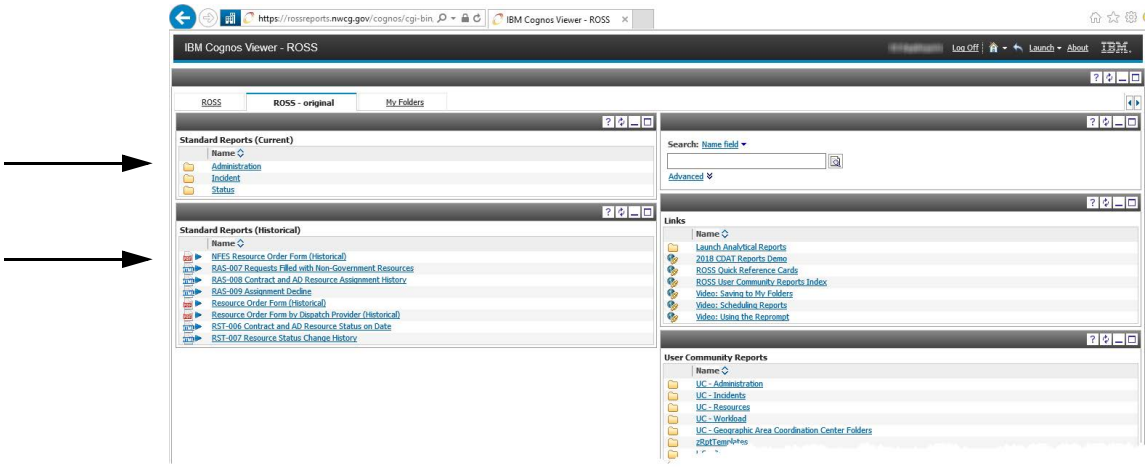
- Overview
- Completing Standard Report Criteria Blocks
- Creating a Report View
- Creating a shortcut to a report.

Overview

Some key points about Standard Reports include:

- Standard Reports are pre-defined and are fixed in format. You cannot change the layout.
- By default, all Standard Reports are generated in PDF format.
- To manipulate columns and rows of report results, change the output format of the report to CSV. Selecting this output format will download the file to your computer. The report results do not display on your screen.
- To quickly access a report you use often, create a shortcut in My Folders.
- To save a PDF of your report results, you can Keep this version, then save the report as a Report View in My Folders.
- To change filter criteria of a Report View, click the Run Report button.

The following graphic shows the location of Standard Reports on the ROSS Reports Portal. The arrows point to the locations of Standard Reports (Current) and Standard Reports (Historical).



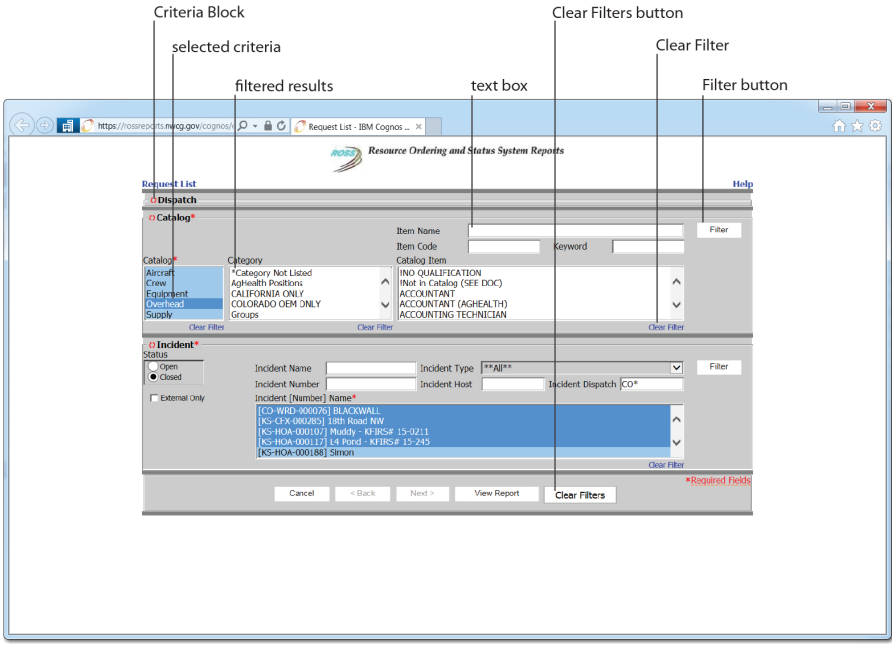
Completing Standard Report Criteria Blocks

Filter criteria for Standard Reports is organized and displayed into Criteria Blocks. Each Criteria Block lists related information in a top-down, left-to-right sequence. The more filter criteria you provide, the faster the report will run.

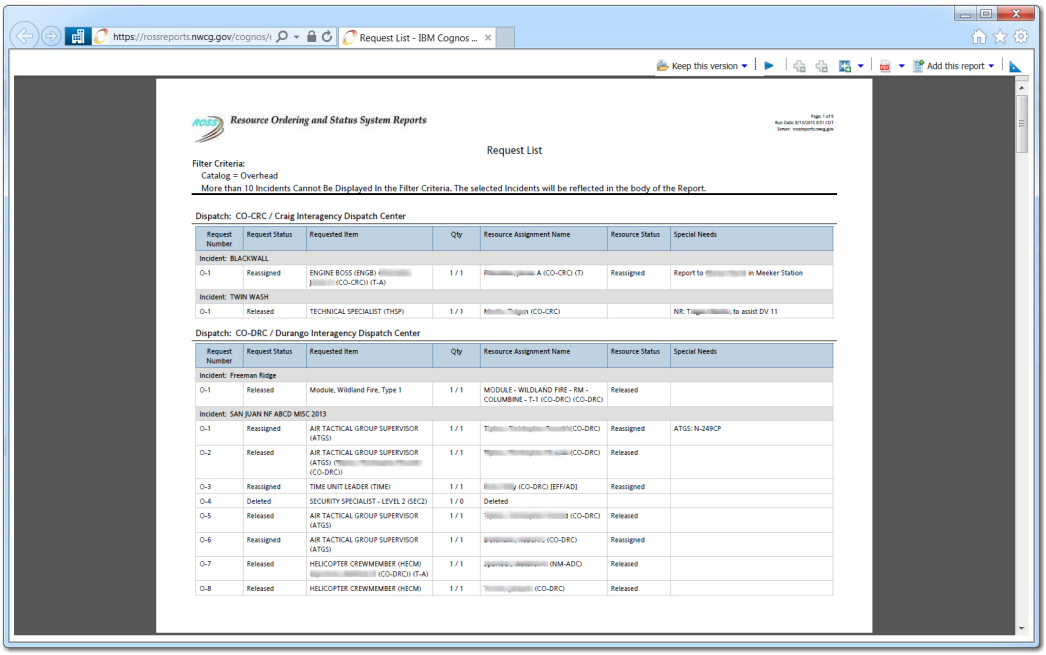
To specify the data for your report

1. Locate the **Standard Report** of your choice.
2. Click the first **( )** to open the first Criteria Block.
3. Complete the first field in the first Criteria Block.
4. Click the **Filter** button, then select one or more of the results.
5. Click the next **( )** to open the next Criteria Block.
6. Continue completing all required Criteria Blocks, selecting the results to further refine your report.
7. When finished selecting all filter criteria, click the **View Report** button.

The following graphic provides an overview of screen components for completing filter criteria for a Standard Report.



The following graphic shows the report results.



To clear Criteria Blocks

1 To clear all **Criteria Blocks**, click the **Clear Filters** button.

2 To clear an individual **Criteria Block**, click **Clear Filter** that corresponds to the Criteria Block you want to clear.

Creating a Report View

For Standard Reports, saving a Report View in My Folders allows you to save the report results as well as specifications of the original report, including queries, prompts, layouts and styles.

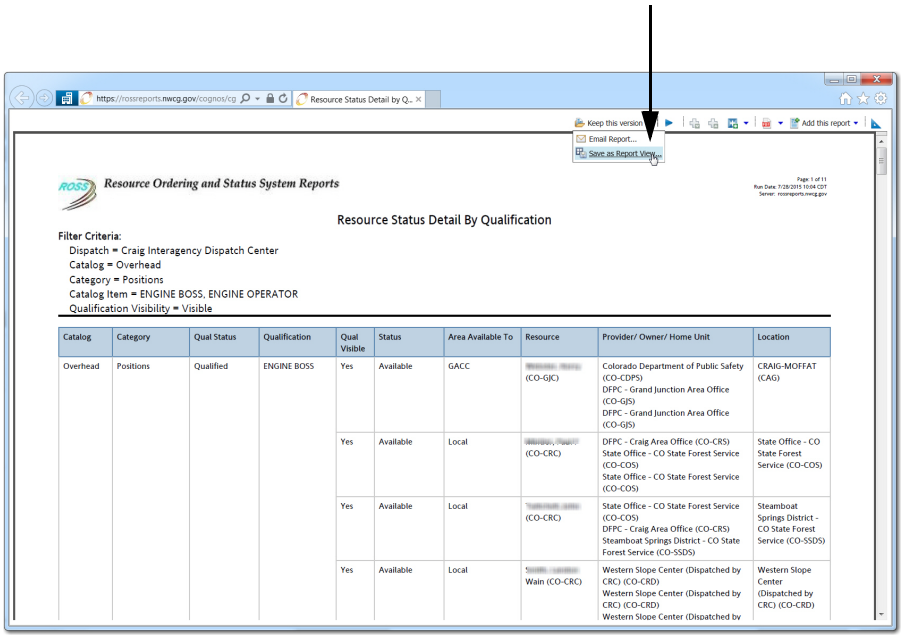
To change the filter criteria, you can the run properties of the Report View, including prompt values, schedules, delivery methods, and output formats.

You can also schedule Report Views to run on a regular basis. For more information see Scheduling Report Views.

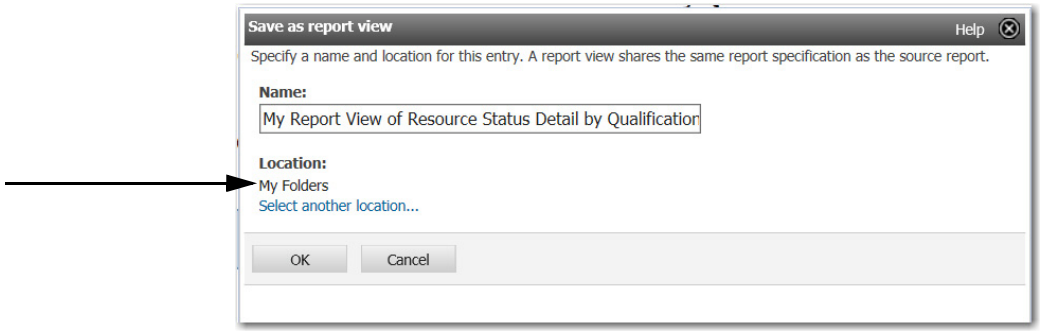
To create a Report View of your report

1. Run the **Standard Report** of your choice.
2. Click the **Keep this version** drop-down arrow, and then click **Save as Report View**.
3. On **Save as report view**, type the **Name of Your Report** in the **Name** text box.
4. Under **Location**, click **Select My Folders**, and then click **OK**.

The following graphic shows a sample Resource Status Detail By Qualification report. The arrow points to the Save as Report View option.



The following graphic shows a sample Save as report view for a Standard report. The arrow points to the My Folders location.



To change filter criteria for a Report View

1. In **My Folders**, click the **Report View** of your choice.
2. Click the **Run Report** button, complete the **Criteria Blocks** to suit your needs, and then click the **View Report** button.

The following graphic shows the My Folders tab with a listing of saved Report Views.

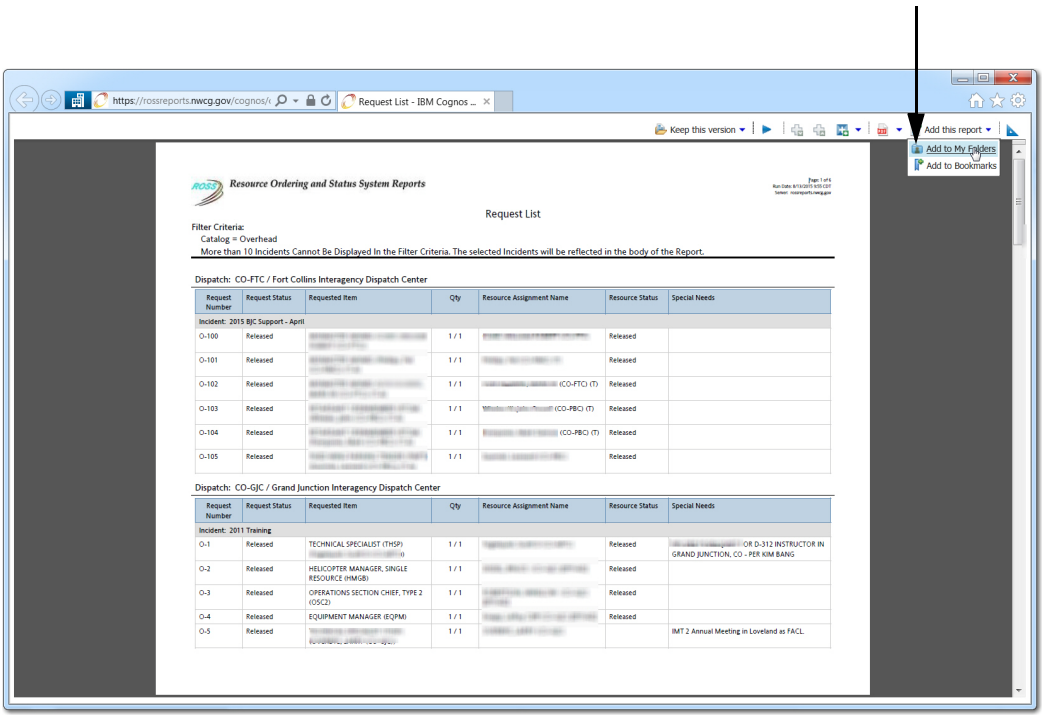
Creating a shortcut to a report

For Standard Reports, creating a shortcut in My Folders provides quick access to reports you need run on a regular basis. You'll need to complete the filter criteria each time you wish to run the report.

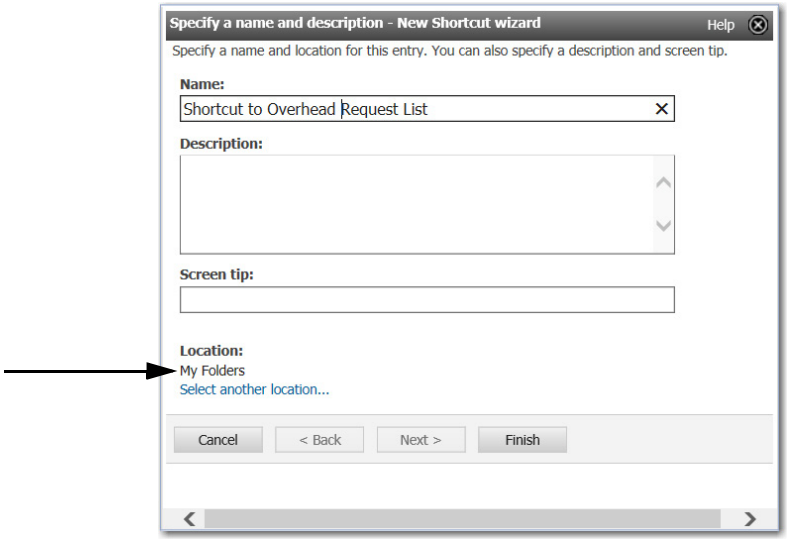
To create a shortcut to a report

1. Run the **Standard Report** of your choice.
2. Click the **Add this report** drop-down arrow, and then click **Add to My Folders**.
3. Complete/modify the **Name**, **Description**, and **Screen tip** boxes as needed.
4. Under **Location**, click **Select My Folders**.
5. Click the **Finish** button.

The following graphic shows a sample Request List. The arrow points to the Add to My Folders option under Add this report.



The following graphic shows the New Shortcut wizard. The arrow points to the My Folders under Location.



Working with User Community reports

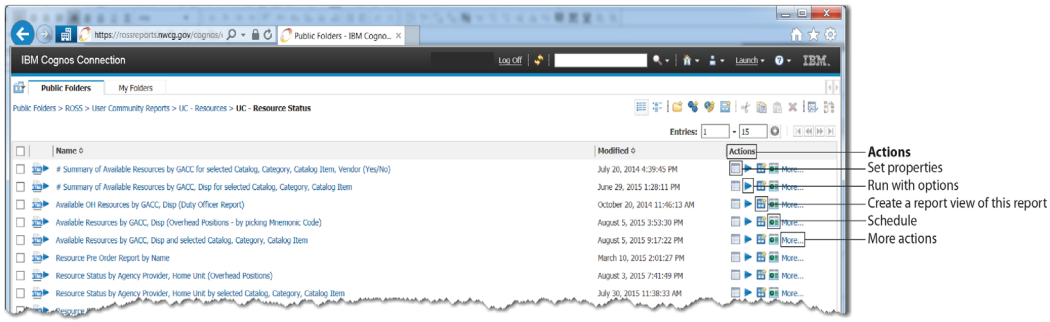
User Community Reports are developed and shared among the user community. Topics in this section include:

- Overview
- Completing the Prompt screen
- Creating a Report View
- Creating a shortcut to a report.

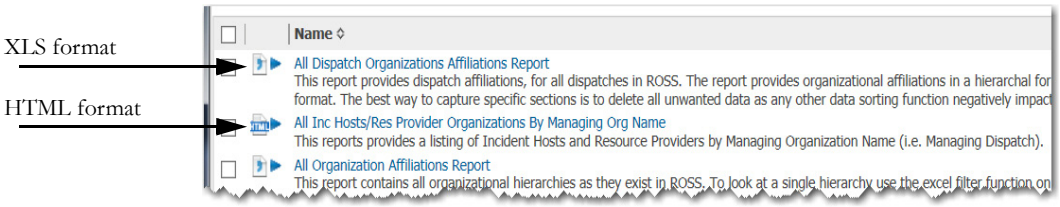
Overview

Key points about User Community Reports, located on the ROSS - Original tab, include:

- Actions list the available options when running the report. To perform an Action, click the button listed to the right of the report you want.



- Each User Community Report is run using a default format that is indicated by the icon to the left of the report name.



- Change the default format to suit your reporting needs. Available formats include HTML, PDF, XML, XLS, and CSV.
- Create a Report View of a source report to schedule, change the run options, and change the default output format of the source report.
- Schedule a Report View to run on a regular basis using the most current data.
- For reports generated in XLS and CSV formats, all the features in Excel are available to suit your reporting needs.
- To manipulate columns and rows of report results, change the output format of the report to CSV. Selecting this output format will download

the file to your computer. The report results do not display on your screen.

- To quickly access a report you use often, create a shortcut in My Folders.

Completing the Prompt screen

The Prompt screen allows you to filter for data to be included in your report. Prompts are organized and displayed in a top-down sequence. The more filter criteria you provide, the faster the report will run.

To select a range of values, press and hold [Shift], then click the top-most and the lowest listed values.

To select more than one value at a time, click and hold [Ctrl], then click the values you want.

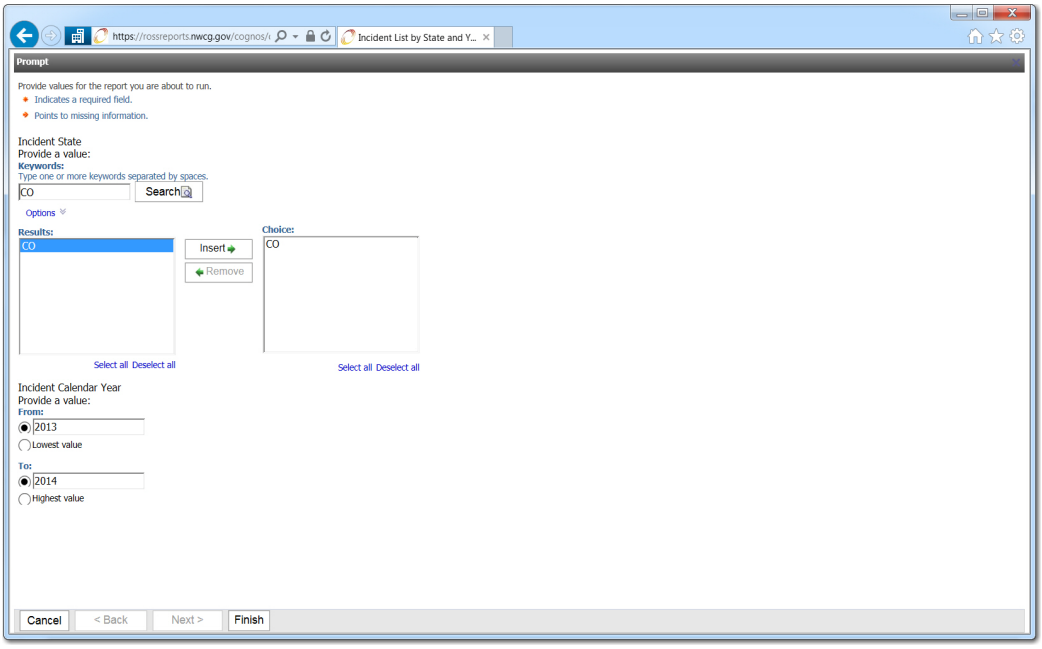
To complete the Prompt screen for a User Community report

Required values display a red asterisk (*) next to its name.

1. Click the **User Community Report** of your choice.
2. On the **Prompt** screen, complete all required **Prompt values**, clicking the **Reprompt** button after each selection.
3. Click **Finish** or **OK**.

   The Finish button or OK button appears dimmed until you complete all required Prompt values.

The following graphic shows a sample Prompt screen for the Incident List by State and Year.

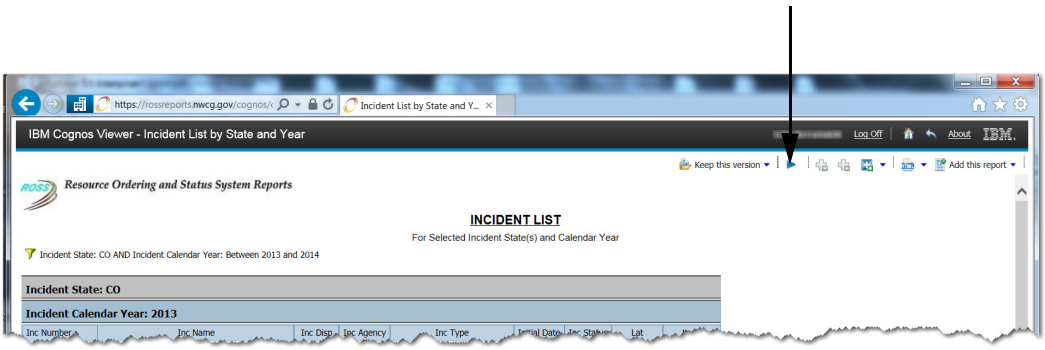


To change prompt values for your report

1 While viewing the report, click the **Run Report** button.

2 Complete the required **Prompt values** as appropriate, and then click **Finish** or **OK**.

The following graphic shows the Cognos Viewer toolbar. The arrow points to location of the Run button.



To download report results in its default output format

1 While viewing the report, click the **Keep this version** drop-down arrow, and then click **Download the report**.

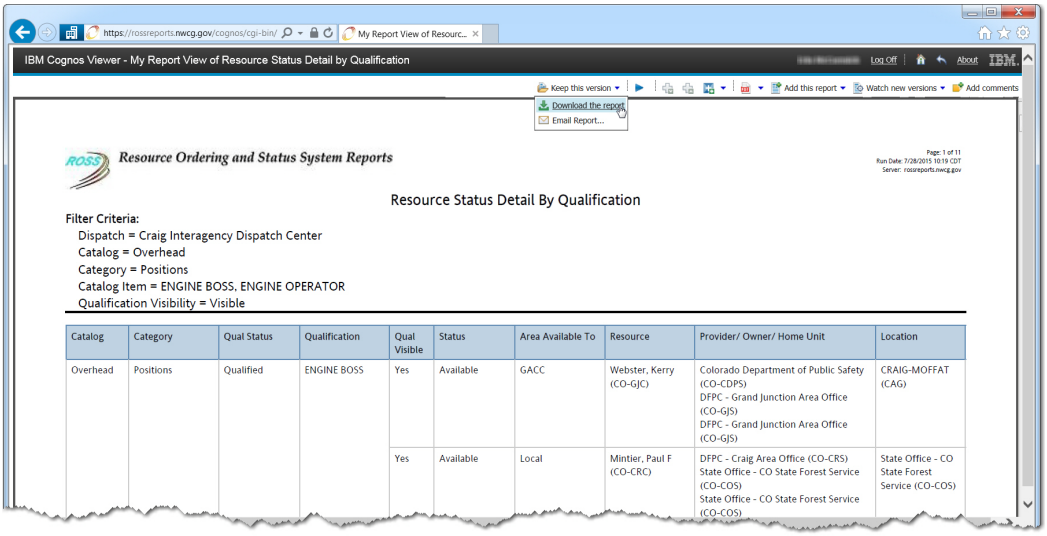
2 Save the report to a location of your choice.

3 Complete/modify the **Name**, **Description**, and **Screen tip** boxes as needed.

4 Under **Location**, click **Select My Folders**.

5 Click the **Finish** button.

The following graphic shows the Download the report option under the Keep this version drop-down arrow.



Catalog	Category	Qual Status	Qualification	Qual Visible	Status	Area Available To	Resource	Provider/ Owner/ Home Unit	Location
Overhead	Positions	Qualified	ENGINE BOSS	Yes	Available	GACC	Webster, Kerry (CO-GJC)	Colorado Department of Public Safety (CO-CDPS) DFPC - Grand Junction Area Office (CO-GJS) DFPC - Grand Junction Area Office (CO-GJS)	CRAIG-MOFFAT (CAG)
				Yes	Available	Local	Mintier, Paul F (CO-CRC)	DFPC - Craig Area Office (CO-CRS) State Office - CO State Forest Service (CO-COS) State Office - CO State Forest Service (CO-COS)	State Office - CO State Forest Service (CO-COS)

Creating a Report View

Create a Report View when you want to maintain a customized view of the source report, instead of creating a copy of that source. The Report View shares the same specifications of the original report, including queries, prompts, layouts and styles.

You can customize the run properties of the Report View, including prompt values, schedules, delivery methods, and output formats.

You can also schedule Report Views to run on a regular basis. For more information see Scheduling Report Views.

To create a Report View

1 Locate the **Report** you want.

2 Under **Actions**, click **Create a report view of this report**.

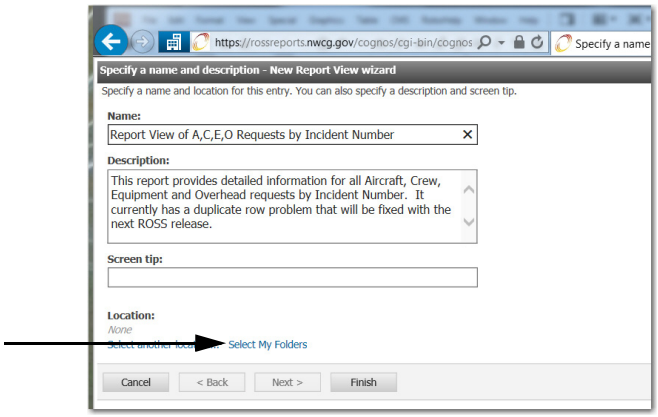
3 Complete/modify the **Name**, **Description**, and **Screen tip boxes** as needed.

4 Under **Location**, click **Select My Folders**.

5 Click the **Finish** button.

The following graphic shows the User Community Reports available under UC - Incident Requests. The arrow points to Create a report view of this report button.

The following graphic shows the New Report View wizard. The arrow points to the Select My Folders option under Location.



The Description of the report appears when you set your preference to Details View.

Creating a shortcut to your report

For reports you need to run frequently, you can create a shortcut and save it in My Folders.

Create new folders in My Folders to better organize your shortcuts and Report Views.

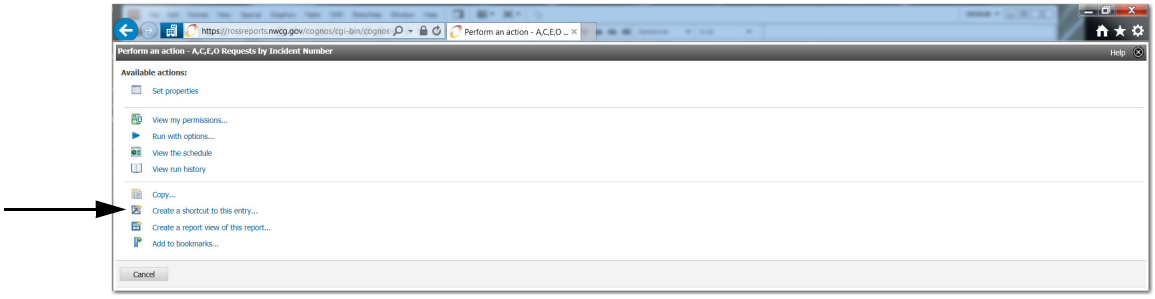
To create a shortcut to a report

1. Locate the **Report** you want.
2. Under **Actions**, click **More**, and then click **Create a shortcut to this entry**.
3. Complete/modify the **Name**, **Description**, and **Screen tip** boxes as needed.
4. Under **Location**, click **Select My Folders**.

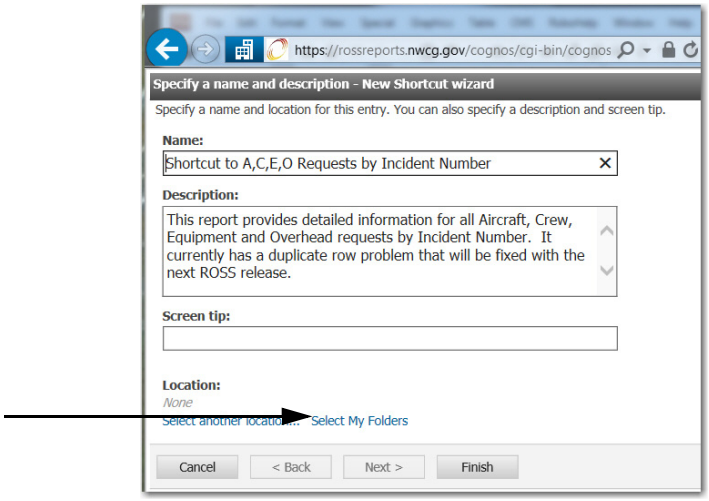
5 Click the **Finish** button.

The following graphic shows the User Community Reports available under UC - Incident Requests. The arrow points to More actions.

The following graphic shows the Perform an action screen. The arrow points to Create a shortcut to this entry.



The following graphic shows the New Shortcut wizard. The arrow points to the Select My Folders option under Location.



The Description of the report appears when you set your preference to Details View.

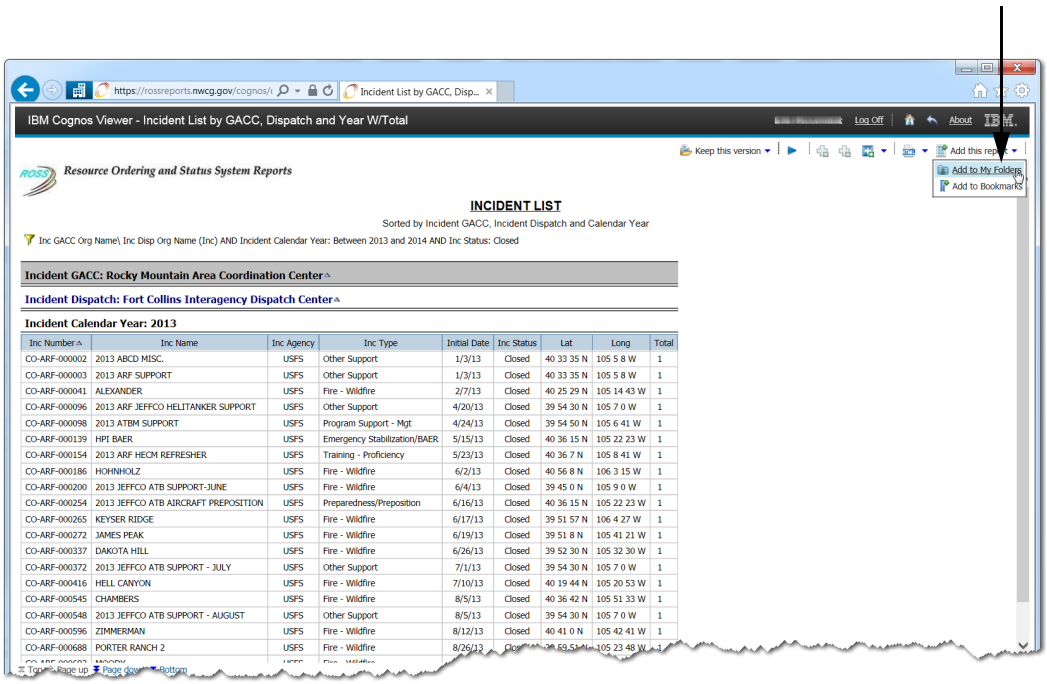
To create a shortcut to a report you are currently viewing

1 While viewing the User Community report, click **Add this report**, and then click **Add to My Folders**.

2 Complete/modify the **Name**, **Description**, and **Screen tip** boxes as needed.

3 Click the **Finish** button.

The following graphic shows a sample Incident List report. The arrow points to the Add to My Folders option under Add this report.



Inc Number	Inc Name	Inc Agency	Inc Type	Initial Date	Inc Status	Lat	Long	Total
CO-ARF-000002	2013 ABCD MISC.	USFS	Other Support	1/3/13	Closed	40 33 35 N	105 5 8 W	1
CO-ARF-000003	2013 ARF SUPPORT	USFS	Other Support	1/3/13	Closed	40 33 35 N	105 5 8 W	1
CO-ARF-000041	ALEXANDER	USFS	Fire - Wildfire	2/7/13	Closed	40 25 29 N	105 14 43 W	1
CO-ARF-000096	2013 ARF JEFFCO HELITANKER SUPPORT	USFS	Other Support	4/20/13	Closed	39 54 30 N	105 7 0 W	1
CO-ARF-000098	2013 ATBM SUPPORT	USFS	Program Support - Mgt	4/24/13	Closed	39 54 50 N	105 6 41 W	1
CO-ARF-000139	HPI BAER	USFS	Emergency Stabilization/BAER	5/15/13	Closed	40 36 15 N	105 22 23 W	1
CO-ARF-000154	2013 ARF HECM REFRESHER	USFS	Training - Proficiency	5/23/13	Closed	40 36 7 N	105 8 41 W	1
CO-ARF-000186	HOHNHOLZ	USFS	Fire - Wildfire	6/2/13	Closed	40 56 8 N	106 3 15 W	1
CO-ARF-000200	2013 JEFFCO ATB SUPPORT-JUNE	USFS	Fire - Wildfire	6/4/13	Closed	39 45 0 N	105 9 0 W	1
CO-ARF-000254	2013 JEFFCO ATB AIRCRAFT PREPOSITION	USFS	Preparedness/Preposition	6/16/13	Closed	40 36 15 N	105 22 23 W	1
CO-ARF-000265	KEYSER RIDGE	USFS	Fire - Wildfire	6/17/13	Closed	39 51 57 N	106 4 27 W	1
CO-ARF-000272	JAMES PEAK	USFS	Fire - Wildfire	6/19/13	Closed	39 51 8 N	105 41 21 W	1
CO-ARF-000337	DAKOTA HILL	USFS	Fire - Wildfire	6/26/13	Closed	39 52 30 N	105 32 30 W	1
CO-ARF-000372	2013 JEFFCO ATB SUPPORT - JULY	USFS	Other Support	7/1/13	Closed	39 54 30 N	105 7 0 W	1
CO-ARF-000416	HELL CANYON	USFS	Fire - Wildfire	7/10/13	Closed	40 19 44 N	105 20 53 W	1
CO-ARF-000545	CHAMBERS	USFS	Fire - Wildfire	8/5/13	Closed	40 36 42 N	105 51 33 W	1
CO-ARF-000548	2013 JEFFCO ATB SUPPORT - AUGUST	USFS	Other Support	8/5/13	Closed	39 54 30 N	105 7 0 W	1
CO-ARF-000596	ZIMMERMAN	USFS	Fire - Wildfire	8/12/13	Closed	40 41 0 N	105 42 41 W	1
CO-ARF-000688	PORTER RANCH 2	USFS	Fire - Wildfire	8/26/13	[illegible]	[illegible]	105 23 48 W	1

Saving report results in another output format

If you are planning to use MS Excel, the best option is to save the report results in the CSV output format, which saves the report values in plain text but eliminates any formatting that may be carried over from the original.

When you open the CSV report in Excel, you may elect to add any additional formatting as needed, save it in XLS or XLSX as needed, or keep it in CSV.

To save report results in another output format

To use Excel for your reporting needs, save the Report View in CSV format.

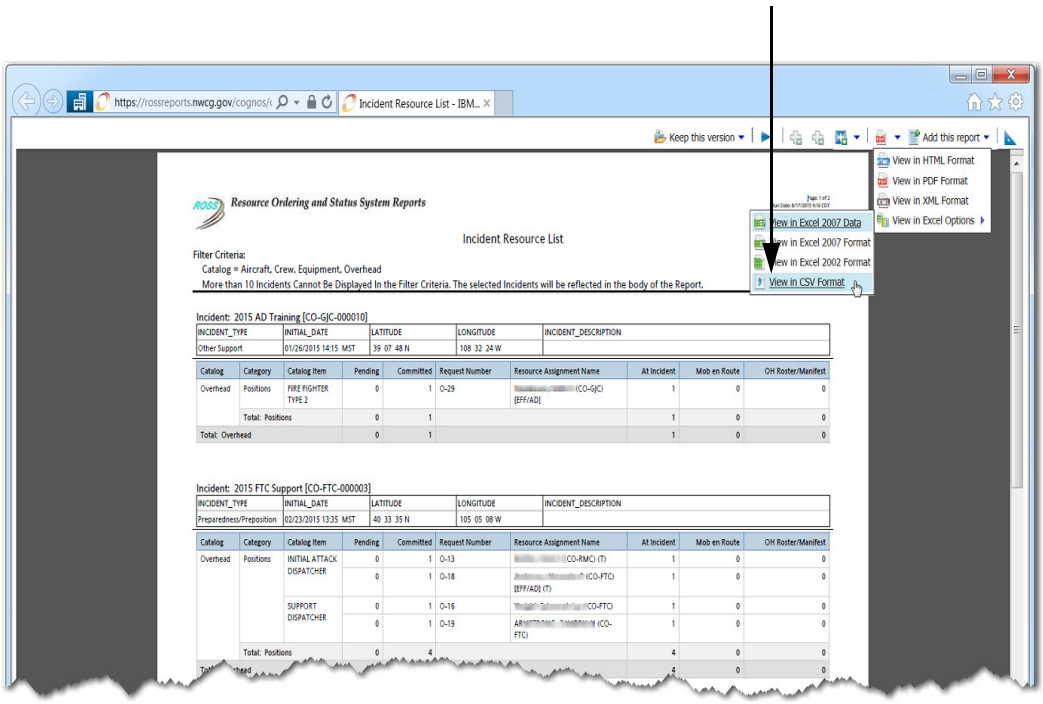
1 Run the **Report** of your choice.

2 Click the **Format** drop-down arrow, and then click the **View in** format option of your choice.

*To save in CSV, point to **View in Excel Options**, and then click **View in CSV Format**.*

3 Click **Save** or **Save As**, and then save the report to a **Folder** and **File Location** of your choice.

The following graphic shows a sample Incident Resource list. The arrow points to the View in CSV Format.



To run with options

1 On the **My Folders** tab, click the **Run with options** button that corresponds to the **Report** of your choice.

2 On the **Run with options** screen, click the **Format** drop-down arrow, and then click the **Format** of your choice.

3 Under **Delivery**, click the **Option** of your choice, and then click the **Run** button.

4 On the **Prompt** screen, complete the required **Prompt values** as appropriate, and then click **Finish** or **OK**.

Scheduling a Report View

This section explains how to schedule a Report View saved in My Folders.

You can schedule a single report or multiple reports to run at specific intervals. For example, you can schedule several reports to be run at the end of every month.

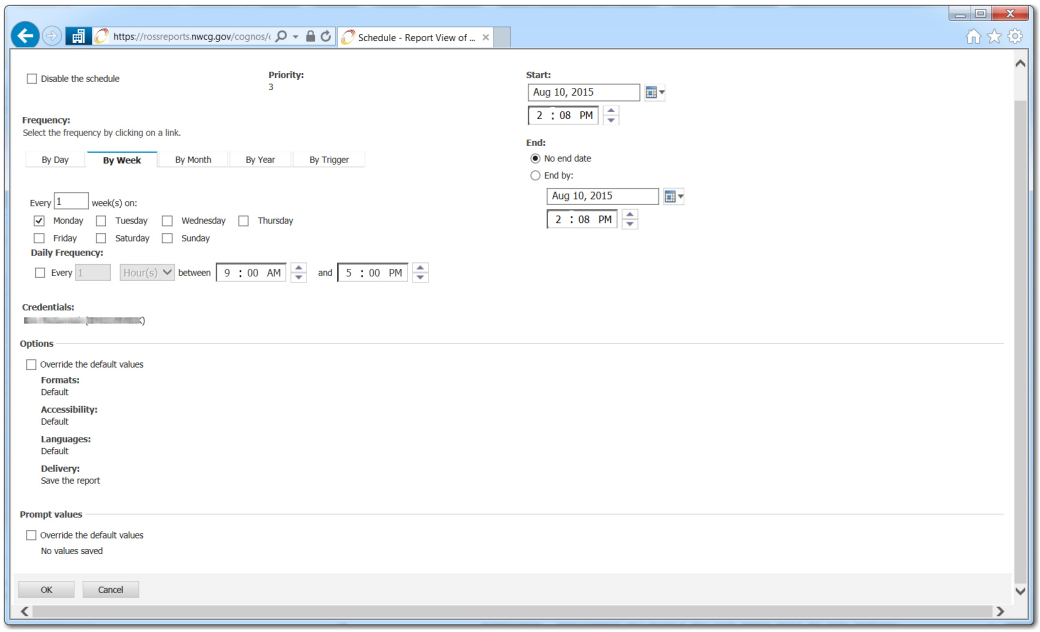
Determine how often you realistically need the report to run. Running the report as you need it may be more appropriate if you need the report frequently throughout the day.

To schedule a single report to run on a regular basis

1. Click the **My Folders** tab, and then click the **Schedule** button that corresponds to the **Report View** of your choice.
2. On the **Schedule** screen, click the **Frequency tab** of your choice, and then complete the information as appropriate.
3. To change **Options**, click the **Override the default values** check box, and then select the options you want.
4. Under **Prompt values**, click the **Override default values** check box, and then click the **Set** link.
5. On the **Prompt** screen, complete the **Report Values**, and then click the **Finish** button.
6. On the **Schedule** screen that displays for the **Frequency** tab you selected, complete the information as appropriate, and then click **OK**.

The following graphic shows the User Community Reports available under UC - Incident Requests. The arrow points to the Schedule button.

The following graphic shows a sample Schedule screen. In this example, the report is scheduled to run every Monday.



To edit a schedule

1. On the **My Folders** tab, click the **Schedule** link that corresponds to the **Report** of your choice.
2. On the **Schedule** screen, change the information as appropriate for that screen and your needs, and then click **OK**.

To disable a schedule

1. On the **My Folders** tab, click the **Schedule** link that corresponds to the **Report** of your choice.
2. On the **Schedule** screen, click the **Disable the schedule** check box, and then click **OK**.

To schedule multiple reports to run on a regular basis

Saved schedules appear on your My Folders tab.

1. On the **toolbar**, click the **New job** button.
2. On the **New job wizard**, complete the following information and then click the **Next** button
   - Name
   - Description
   - Screen tip.
3. On the **Select the steps** page, click the **Add** link.

4 On the **Select entries (Navigate)** page, click the **check boxes** that correspond to the **Report(s)** you want to schedule, and then click the **Add** arrow button.

*You can also click **Search** to locate reports you want to add.*

5 If appropriate, click the **Cognos** link, and then navigate to **Public Folders> ROSS** to add other reports to the schedule, and then click the **Add** arrow button.

6 When finished adding all reports to the schedule, click **OK**.

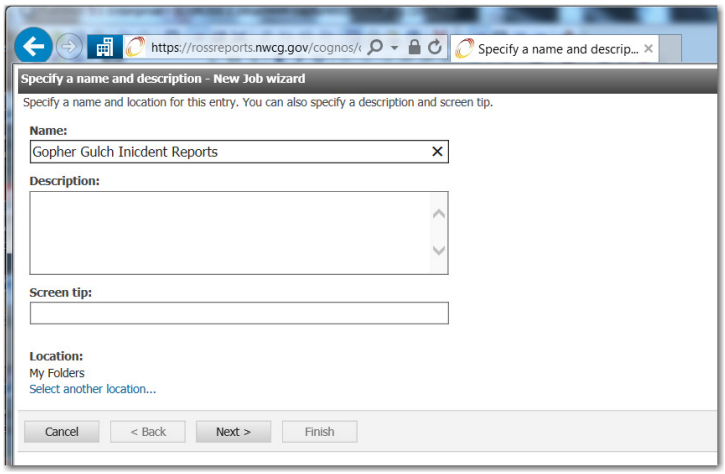
7 Under **Submission of steps**, click the **Option** of your choice, and then click the **Next** button.

8 On the **Select an action - job** screen, click **Save and schedule**, and then click the **Finish** button.

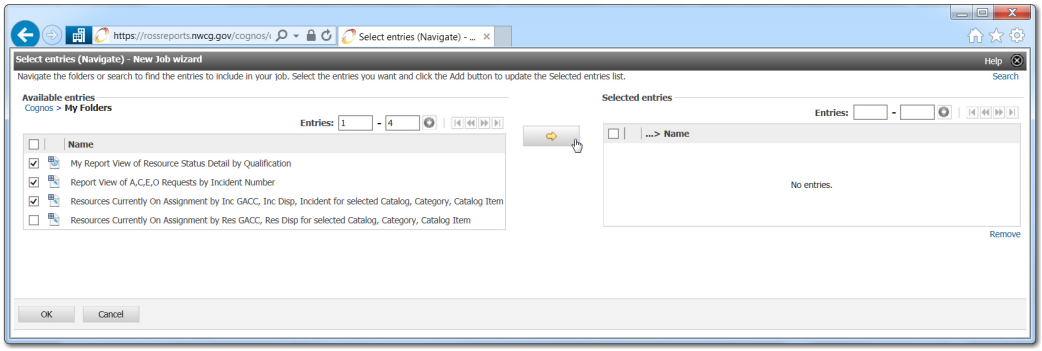
9 On the **Schedule** screen that displays for the **Frequency** tab you selected, complete the information as appropriate, and then click **OK**.

The following graphic shows a sample My Folders tab. The arrow points to the New job button on the toolbar.

The following graphic shows the New job wizard for naming the scheduled reports.



The following graphic shows the Select entries (Navigate) page and the reports to be added to the schedule from My Folders.



Troubleshooting

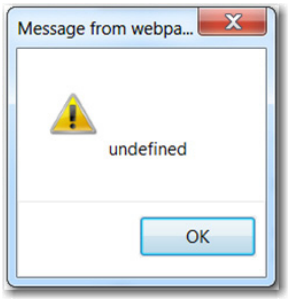
This section outlines some solutions to issues related to ROSS Reports. Topics include:

- Correcting the undefined error
- Modifying your Internet security settings.

Additional topics will be added as needed.

Correcting the undefined error

The undefined error is associated with using the Internet Explorer web browser.



To resolve this issue, you must add nwcg.gov to your Compatibility View settings.

To add nwcg.gov to your Compatibility View settings

1. From the R**OSS Reports Portal** page, click **Tools**, and then click **Compatibility View settings**.
2. On the **Compatibility View Settings** dialog box, ensure that **nwcg.gov** displays in the **Add this website** text box, click **Add**, and then click **Close.**

Modifying your Internet security settings

Perform this task to download and open an Excel ROSS report on your computer. You may need to contact your System Administrator to complete this task.

You will need to perform this task only once.

To modify your computer Internet security settings

1. Start **Internet Explorer**.
2. On the **Tools** menu, click **Internet options**.
3. On the **Internet Options** dialog box, click the **Privacy** tab, click to clear the **Tun on Pop-up Blocker** check box, and then click the **Apply** button.
4. **C**lick the **Security** tab.
5. On the **Security** tab, click **Trusted sites**, and then click the **Sites** button.
6. On the **Trusted sites** dialog box in the **Add this website to the zone** text box, type **http://*.nwcg.gov**, click and then click the **Add** button, and then click the **Close** button.

   Note: *On some computers an administrator will be needed to continue with the following steps if the options are grayed out.*
7. On the **Security** tab, click the **Internet** icon, and then click the **Custom level** button.
8. On the **Security Settings - Internet Zone** dialog box under **Settings**, click the scroll bar to display **Downloads**.
9. Under **Automatic prompting for file downloads**, click **Enable**.
10. Under **File download**, click **Enable**, and then click **OK** to close the **Security Settings - Internet Zone** dialog box.
11. Repeat steps #6 through #9 for **Intranet** icon and **Trusted Sites** icon.
12. On the **Internet Options** dialog box, click **OK**, and then close **Internet Explorer**.