

# ROSS DISPATCH

## STANDARD ROSS REPORTS

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### OBJECTIVES

Upon completion of this unit, the trainee will be able to:

1. View a standard report by applying the:
  - a. Dispatch.
  - b. Catalog.
  - c. Resource.
  - d. Dispatch and Provider.
  - e. Catalog Resource.
  - f. Incident.
  - g. Incident Requests.
  - h. Time Period.
  - i. Travel Plan.
  - j. External Supply Cache Request.
  - k. Incident Initial Year.
2. Utilize Cognos Viewer features.
3. Print and save report results.
4. Set personal preferences.
5. View a report using alternate run options.
6. Create a 'Report View'.
7. Set report properties.
8. Schedule a report run.
9. Manage report schedules.
10. Create a job.
11. Create a page.

## Table of Contents

	<u>Page</u>
I. REPORTS OVERVIEW .....	3
II. COGNOS BASICS.....	6
III. VIEWING A REPORT .....	9
Filter Panels:.....	10
IV. COGNOS VIEWER.....	15
V. PRINTING AND SAVING REPORT RESULTS .....	17
VI. SETTING PERSONAL PREFERENCES .....	17
VII. RUNNING WITH OPTIONS.....	20
VIII. CREATING A REPORT VIEW AND .....	23
SETTING REPORT PROPERTIES	
IX. SCHEDULING A REPORT RUN .....	29
Managing Report Run Activity and Schedules.....	29
X. ADDITIONAL FEATURES .....	32
New Folder .....	32
New Job.....	32
New Page .....	36
'More...' Action column link.....	38

## I. REPORTS OVERVIEW

Four degrees of ROSS reporting:

### A. Standard.

1. Pre-defined list of reports.
2. Viewed in web browser via Cognos Connection.
3. Can set filter criteria.
4. Cannot select query items.
5. Accessing:
  - a. From within ROSS via 'Reports Portal' item under ROSS Reports menu.
  - b. Directly via: <https://rossreports.nwcg.gov/>

## B. Print Button Reports

- a. Pre-defined report generated by Cognos when a Print button is clicked in ROSS (e.g., Resource Order Form).
- b. Different from Standard reports in that user cannot select filter criteria.
- c. Report content is dictated by specific record (e.g., request, resource) selected on ROSS screen.

## C. Ad Hoc (ROSS Analytical Reports and ROSS Analytical Reports Historical).

1. Create custom reports in web browser via Cognos Query Studio.
2. Drag and drop query subjects onto a report window.
3. Can create crosstab reports.

Example: Number of resources on incidents started between 08/01 and 08/15 2009, by date, by GACC, by Host, and by incident type.

D. Advanced.

1. Advanced features of Cognos Query Studio.
2. Cognos Report Studio.

## II. COGNOS BASICS

### A. Logging on.

1. Selecting 'Reports Portal' under the Reports menu in ROSS automatically logs you into Cognos.
2. Session times out after one hour of inactivity.
3. Logging back in:
  - a. Leave default namespace of ROSSLDAPSSL.
  - b. Cognos User ID and Password same as ROSS Username and Password.

### B. Logging off.

### C. Refresh button.

### D. Searching.

1. Enter search criteria and click Search button.

2. Advanced Search.

E. Home button.

1. Takes you to your Cognos Connection homepage.

2. To set homepage select 'Set View as Home'.

F. My Area.

1. My Inbox.

2. My Watch List.

3. My Preferences.

4. My Activities and Schedules.

G. Launch link – Provides access to Query (and other) Studios.

H. Help button.

1. Help – Cognos Connection User Guide.

2. Getting Started – Cognos Business Intelligence tool.
  3. IBM Cognos on the Web – Cognos homepage.
  4. Go to the Welcome Page.
  5. About IBM Cognos Connection.
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- I. Scroll Buttons.

### III. VIEWING A REPORT

A. Public Folders tab – Contains reports available to all users.

B. Groupings of ROSS reports:

1. Administration – Reports used to facilitate management of a dispatch's catalog and resource items.
2. Incident – Reports used to facilitate management of an incident and its assigned resources.
3. Status – Reports providing detailed and summary information on status of resources as maintained in ROSS.
4. Standard Reports Historical – Historical (i.e., multi-year) versions of the Resource Order Form, NFES Resource Order Form, and Resource Order Form by Dispatch Provider reports.

C. To view a report:

1. Open appropriate ROSS folder.
2. Click appropriate report link.

3. While waiting, 'Select delivery method' may display.
4. Applicable filter panels display.

#### D. Filter Panels.

1. To open a filter panel, click on its title.
2. Panels containing at least one required field are marked with an asterisk (\*).
3. Each individual required field within a filter panel:
  - a. Marked with an asterisk (\*).
  - b. Red dashed line below.
4. Buttons and links:
  - a. Filter button.
  - b. Clear Filter links – Clears only that specific filter.
  - c. Help link.

- d. Cancel button.
  - e. Back button.
  - f. Next button.
  - g. View Report button – Enabled only when all required values, on all required panels, have been selected/entered.
  - h. Clear Filters button – Clears all filters on all panels.
5. Settings in one filter panel do not affect other filter panels.
6. To close an open panel, click on its title again.
- E. Dispatch filter panel.
- a. Name and Unit ID – Enter text and click Filter button. Wildcard permitted.
  - b. Multiples of Unit ID Prefix – Select one or more prefixes and click Filter.

- c. Dispatch (required) – Select one or more dispatches.
- d. Selection fields turn blue once an entry has been selected.

F. Catalog filter panel.

1. Catalog (required).

- a. Select one or more catalogs.
- b. Click Filter only if you want to select Category(ies) and/or Catalog Item(s).

2. Category – Used to further filter Catalog Item field.

3. Catalog Item.

- a. Item Name, Item Code, and Keyword – Enter text and click Filter button.
- b. Select one or more catalog items.

G. Resource filter panel.

1. Qualifications.

2. Resource Status.

3. Resource Availability Area.

H. Dispatch and Provider filter panel – Select dispatches; click Filter only if selecting Providers.

I. Catalog Resource filter panel – Five fields along top of tab filter Resource field results.

J. Incident filter panel.

K. Incident Requests filter panel.

L. Time Period filter panel.

M. Travel Plan filter panel – Enter the travel plan number. Wildcard is permitted. Each travel plan number is composed of the following:

- 1<sup>st</sup> portion: Unit ID prefix of dispatch that created the plan.
- 2<sup>nd</sup> portion: Unit ID suffix of dispatch that created the plan.
- 3<sup>rd</sup> portion: Year in which plan was created.
- 4<sup>th</sup> portion: Sequential number automatically generated for each plan.

N. External Supply Cache Requests filter panel.

O. Incident Initial Year filter panel.

#### IV. COGNOS VIEWER

##### A. Keep this Version.

1. Email Report – ‘Set the email options’ screen.
2. Save Report – Do not select unless you wish to overwrite the specifications of the report.
3. Save as Report View.
  - a. A ‘Report View’ allows a user to maintain a customized view of another report, rather than creating a copy.
  - b. A Report View shares the same specifications (e.g., queries, prompts, layouts, styles) as its ‘source’ report.
  - c. The properties (e.g., prompt values, schedules, delivery methods, run options, output formats) of a Report View can be customized without affecting the properties of the source report.

##### B. Run – Returns you to filter panels for the report.

C. Drill Down – Not currently applicable.

D. Drill Up – Not currently applicable.

E. Go To – Related to drill down report - not currently applicable.

F. 'View in PDF/HTML/etc.' Format.

1. PDF – Best option for printing.

2. HTML – One benefit is can scroll through report, whereas PDF is page-to-page.

G. Add this Report.

1. Add to My Folders – Saves the report settings, not the report results. New Shortcut Wizard displays.

2. Add to My Bookmarks – Adds webpage to your browser favorites list.

## V. PRINTING AND SAVING REPORT RESULTS

- A. First view report in PDF format.
- B. Use Internet browser Save and Print options.

## VI. SETTING PERSONAL PREFERENCES

- A. Select My Preferences under My Area button drop-down.
- B. Set Preferences – General tab.

Fields of note:

1. Show hidden entries – Should entries (folders, reports, pages, etc.) you have hidden display to users as shaded out, or not show at all?
2. Show a summary of the run options – Applicable to scheduled runs.

3. Portal.

C. Set Preferences – Personal tab.

Fields of note:

1. Alerts – Can receive email when there is a new version of a report.

2. Credentials.

a. Scheduled runs execute using your login credentials.

b. Can authorize other users to use your credentials (for example their account is locked up).

c. If change login or password, must renew credentials or scheduled runs will fail.

D. Set Preferences – Portal Tabs tab – Can use a tab to group reports sharing common settings or attributes.

Links:

1. Add portal tabs.
2. Remove this portal tab.
3. Modify the sequence – Set order of tabs using Up, Down, To top, and To bottom links

## VII. RUNNING WITH OPTIONS

A. Run with Options button.

B. Format.

C. Delivery.

1. View the report now.

2. Save the report.

a. If just select 'Save the report' radio button, saves a new report in the same folder as the selected report.

b. If select 'Save the report' radio button and click 'Advanced Options' link, can save as a Report View.

3. Print the report – Cannot be used since impossible to identify all possible printers; instead must save the report and then print.

D. Prompt Values.

E. Advanced Options.

1. Time and Mode.

- a. 'View the report now' radio button.

- b. 'Run in the background' radio button.

2. Delivery – Save, print, and send report results.

- a. 'Save' check box.

- 'Save the report' radio button.

- 'Save the report as a report view' radio button.

- ‘Edit the options’ link > ‘Save as report view’ screen.
  - b. ‘Print the report’ check box – Not operational.
  - c. ‘Send the report and a link to the report by email’ check box.
    - ‘Edit the options’ link > ‘Set the email options’ screen.
3. Run and Cancel buttons.

## VIII. CREATING A REPORT VIEW AND SETTING REPORT PROPERTIES

A. 'Set properties – [report name]' button – Displays Set Properties screen.

1. General tab (of Set properties screen).

a. General information.

- 'Set the contact' link – Individual responsible for the Report View.
  - 'Select the contact' – Not operational.
  - 'Enter an email address' – Can enter an email address.
- 'Disable this entry' check box – Blocks users without write permission from accessing the report.
- 'Hide this entry' check box – Blocks all other users from accessing and making changes to the report.

- 'View the search path, ID, and URL' link.
- b. Name, Screen Tip, and Description.
- c. Run history – Can maintain a history of runs by either 'Number of occurrences' or 'Duration'.
- d. Report output versions.
- Each run can produce one or more saved outputs (PDF, HTML, etc.).
  - Each run is considered a 'version'.
  - Can maintain a history of output versions by either 'Number of occurrences' or 'Duration'.
- e. Source report section (on General tab of Set Properties screen).
- Report Properties link – Not operational.

- 'Link to a report...' link – Used to associate a report view to a different source report.

## 2. Report view tab (of Set properties screen).

### a. Default action.

- View most recent report – Report does not run. Most recent run results display.
- Run the report.

### b. Report options.

- If checked – Custom options applied.
- If unchecked – Default options applied (as set in Personal Preferences).
- PDF options.

c. Prompt values – If enter prompt values (i.e., filter criteria), will not be prompted to enter values when report runs.

- Scheduled Reports:
  - Run will fail if prompt values not entered beforehand.
  - Always ensure every report in a batch job has prompt values.
- Initially displays 'No values saved'.
- To set prompts:
  - Click 'Set...' link.
  - Applicable filter panels display.
  - Click View Report to save settings.
- 'View all' link – Displays filter settings in list format.
- 'Edit...' link – Displays filter panels for editing.

- 'Clear' link – Sets filter criteria back to defaults.
- 'Prompt for values' checkbox – Saved filter values are ignored; filter panels display when report is run and values must be selected.

d. Advanced options.

- 'Number of rows per Web page in HTML reports'.
  - 'Enable selection-based interactivity in HTML reports' – Leave checked; relates to advanced Cognos Viewer features.
  - 'Enable alerts about new versions' – Will receive an email each time report output is saved.
  - 'Enable enhanced user features in saved output versions' – N/A (relates to importing outputs into other Cognos applications).
  - 'Enable comments in saved output versions' – Allows report users to add comments to saved HTML, PDF, and XML output versions via Cognos Viewer.
- Report Cache.

3. Permissions tab (of Set properties screen).
  - a. Access permissions inherited from source report.
  - b. 'Override the access permissions acquired from the parent entry' check box – Check to set unique permissions.
  - c. 'Delete the access permissions of all child entries' check box – Replaces existing permissions of children with permissions you are setting for parent.

## IX. SCHEDULING A REPORT RUN

- A. Click 'Schedule' button in Action column.
- B. 'Disable the schedule' check box – Check to suspend execution of schedule.
- C. Frequency
  - 1. Tabs (By Day, By Week, etc.)
  - 2. Options.
  - 3. Prompt Values.
- D. Managing Report Run Activity and Schedules.
  - 1. Click My Area button and select My Activities and Schedules.
  - 2. Current Activities – Displays activities that are currently being processed by the system.

- a. Filter criteria.
  - Status – Pending, Executed, Waiting, Suspended.
  - Priority.
  - Advanced options.
    - Type.
    - Scope.
  - Reset to Default – Clears the filters.
- b. Apply button.
- c. Buttons (upper right of screen).
  - Show / Hide Details.
  - Cancel.
  - Suspend.

- Release.
  
  - Set Priority.
3. Past Activities – Displays activities that have finished processing.
- a. Period.
  
  - b. Status – Succeeded, Failed, Cancelled.
4. Upcoming Activities link – Displays activities that will be processed in the future.
- Status – Scheduled, Canceled.
5. Schedules link – Displays existing schedules.
- Status – Any, Enabled, Disabled.

## X. ADDITIONAL FEATURES

A. New Folder button.

B. New Job button.

1. Overview.

- a. Used to set a common schedule for multiple reports or report views.
- b. Job consists of 'steps'.
- c. Steps can run simultaneously or in sequence.
- d. Run options of individual step entries override run options set for job.
- e. Run options set for job serve as default for steps that do not have own run options.

- f. Jobs can be scheduled just like report runs.
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2. First screen (of New Job) – ‘Specify a name and description’.
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3. Second screen (of New Job) – ‘Select the steps’.
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- a. Add link.
  
  - b. Remove link – Removes selected ‘steps’.
  
  - c. Modify the sequence link.
  
  - d. Reset to default value link – Removes any options and prompt values set specifically for the job step.
  
  - e. Options and prompt values column – Set button (image of a downward pointing pencil).
    - Used to change run options for individual step when run as part of job.
  
    - Run the report to.

- Produce report outputs.
  - Refresh the report cache.
  
  - Report options and Prompt values –Previously discussed.
- f. Submission of steps.
- All at once – If step fails, others unaffected, but job ‘fails’.
  
  - In sequence – Can choose to continue job if step fails (‘Continue on error’).
- g. Default for all steps – Used to set default values for all steps in job.
- Set link.
  
  - Report options.
- h. Run history details level.
- Used to indicate whether to save complete history details when job executes successfully.

- If job run fails, complete history details are saved.

4. Third screen (of New Job) – ‘Select an action’.

- a. Save (the job) and run once – ‘Run with options’ screen displays.
- b. Save and schedule – ‘Schedule’ screen displays.
- c. Save only.

5. Cached Prompt Data.

- a. The report prompts are refreshed each time a scheduled run occurs (i.e., the latest set of prompts, which may have changed since the last run, are applied).
- b. For reports that do not run on a schedule, a job can be created to refresh the prompts at set intervals.
- c. Select ‘Refresh the report cache’ option under ‘Run the report to’ drop-down list.

C. New Page button – Used to create a custom view containing content of your choice.

1. 'Specify a name and description' screen.

2. 'Set columns and layout' screen.

a. Number of columns.

b. Content.

- Add and remove content from a column. Available portlets:
  - Dashboard, IBM Cognos Extended Applications, and IBM Cognos Utility – N/A.
  - IBM Cognos Content – Navigator, Search, Viewer.
- Move content from one column to another.
- Reorder column content.

- Set column width percentage.
- c. Layout options.
3. 'Set page style' screen.
4. 'Select an action' screen.
- a. Add this page to the portal tabs.
  - b. View the page.
- D. Toolbar buttons: Cut, Copy, Paste, and Delete.
- E. Order button.
- 1. Used to set order of folders or reports (i.e., entries).
  - 2. Entries not moved to 'Shown First' display in default order at end of list.

F. 'More...' Action column link.

1. For folders.

a. 'Set properties'.

b. Other Actions.

2. For reports.

a. 'View most recent report in HTML'.

b. 'Modify the schedule'.

c. 'Remove the schedule'.

- d. 'Alert me about new versions'.
  
- e. 'Do not alert me about new versions'.