BIC Cognos Reporting System

A Basic Guide to Accessing and Using the BIC Cognos Reporting System

A Workforce System Training Program
For all Partners and Staff

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BIC Cognos Overview

What is BIC Cognos?
The Business Intelligence Channel (BIC) Cognos is a reporting tool that is used to extract data from the Ohio Workforce Case Management System (OWCMS).

Who can access BIC Cognos?
Anyone who has a valid OWCMS logon and password has access to BIC Cognos. It is important to remember that the information contained within OWCMS is ‘Confidential and Personal Information’ (CPI) in nature and can only be viewed or shared as required to perform your official duties. Viewing or sharing of information for other purposes could result in a violation of agency rules and policy concerning the handling of CPI.

How does BIC Cognos work?
Every night an OWCMS batch is run to update the reporting database with all the newly added changes and/or deletions in OWCMS. The database is always one day behind the current date. When BIC Cognos searches for information from the reporting database, this is called a ‘QUERY’. A ‘QUERY’ is done by selecting data fields that are desired from the BIC Cognos ‘FOLDERS’. BIC Cognos accesses a system of OWCMS data tables that are connected by ‘JOINS’. When the ‘QUERIES’ are created and ran, BIC Cognos searches for the information and returns it in the form of a usable report.

What data can I extract utilizing BIC Cognos?
BIC Cognos can retrieve data items that have been added to OWCMS. There are some ‘QUERIES’ or ‘REPORTS’ that have been set up by Cognos Administrators for public use. These are called ‘CANNED REPORTS’. BIC Cognos can also be used to create new reports. This is known as ‘AD-HOC REPORTING’ (creating your own).

Is the information from BIC Cognos accurate?
BIC Cognos extracts the information that was input into OWCMS. As with any reporting system, the information is only as accurate as the information that was entered. If the data entered into OWCMS is accurate, then the reports from BIC Cognos will be reliable and accurate.

Is the information received from BIC Cognos real time?
All information extracted from BIC Cognos will always be from the previous business day. Every night an OWCMS batch is run to update the reporting database with all the newly added changes and/or deletions in OWCMS.

What is the direct link to access BIC Cognos
The following URL will directly link to the BIC Cognos reporting tool:

https://bic.jfs.ohio.gov/

This symbol will be used throughout this guide. This is a directive used during in-person training sessions to remind the user how a training scenario in this guide may apply in a real-life scenario.
Logging on to BIC Cognos (InnerWeb Option)

1) Open an Internet browser (BIC recommends Internet Explorer) and click on the “Business Intelligence Channel (BIC)” link listed under the Popular Links section on the InnerWeb.
Logging on to BIC Cognos (OWCMS Option)

1) Log-in to Ohio Workforce Case Management System (OWCMS). On the OWCMS Case Load View Screen, select Reports and click on BIC Cognos Reports.

2) The BIC Cognos log-in screen will display. Enter your Novell ID or Partner Username and password and click the Sign In button.
Logging on to BIC Cognos (Direct Link Option)

1) BIC Cognos can be accessed directly by using the URL:

   https://bic.jfs.ohio.gov/

2) Follow the log-on instructions as indicated by Fig 1.

Introduction to IBM Cognos Analytics

1) **Folders and Reports Section:** The Folders and Reports Section contains links to previously created public reports (canned reports). The reports links are organized in folders for ease of locating.

2) **Cognos Connection Toolbar:** This section contains the actions for the main application. For example, the login/logout menu, the IBM Cognos Help menu, and the Notifications menu.

3) **Modification Date:** The modification date displays the last date and time the report was updated.
Team Content Folder

The **Team content** folders contain reports that are relevant to many users. These reports are known as the “canned reports”. In **Team content**, data is grouped and organized in folders. When drilling down (or clicking through) in a folder, the user may see additional folders and/or additional reports contained within those folders.

Office of Workforce Development: OWCMS Folder

1) After clicking on **Team content**, users will see **Office of Workforce Development: OWCMS Folder**. There may be other data folders displayed, depending on the accesses the user holds. However, all OWCMS reporting is contained within this folder.
Run a Report with Default Options

*Scenario Description- In this scenario, we will imagine that we need to run a report that will show us participants who have exited their program. We would like a report that shows us Adults, Dislocated Workers, and CCMEP Youth on one report. This report is available as a canned report in the Team content folder.

1) The report is called Exit Report and is contained in the WIOA folder.

Exit Report

1) After opening the WIOA folder, click on the Exit Report (click on the blue text to run the report).
Prompt Page

1) The Exit Report prompt page displays. Required prompts are indicated by an orange asterisk. We can see that all of the fields on the Exit Report contain an orange asterisk, so all of the fields for this report are required. Prompts without an asterisk indicate that the field is optional.

2) Select the required/desired criteria for the report and click the Finish button.

3) A dialogue box will display asking the user to Open, Save, or Cancel. Click on the Open button on the dialogue box to view the Exit Report. This dialogue box may be different depending upon Internet browser.

4) The Exit Report opens in Microsoft Excel.
Run a Report with Options

*Scenario Description– In this scenario, we are going to use a report that we have previously generated and it appears in our **Recent** section on the **IBM Cognos Analytics** dashboard. We ran the **Exit Report** and as a canned report, this report is set up to automatically generate as an Excel report.

Let’s imagine that for this scenario, your administrator has requested to see this report as a **PDF**.

1) Locate the **Exit Report** in the **Recent** section of the **IBM Cognos Analytics** dashboard.

2) Click on the **three dot icon** in the bottom right hand corner of the **Exit Report** and a list will display.

3) Click on **Run As**.

*Refer to this scenario when you want to run a canned report but need to make a change to the way the report is delivered, like if you would rather have a PDF than an Excel sheet.*
4) A menu will display on the right-hand side of the screen with report format options.

5) Select **PDF** from the menu options.

6) Make sure that the **Prompt me** checkbox is selected, so that the **Prompt** page will display.

7) Click the **Run** button.

8) Complete the desired/required information on the **Prompt** page (as demonstrated on page 10) and click **Finish**.

9) The **Exit Report** will display as a **PDF**.
Run a Report with Options

*Scenario Description– In this scenario, we are going to use a report that we have NOT previously generated. So, this report does not appear in our Recent section of the IBM Cognos Analytics dashboard.

We have been asked to run the canned Enrollment Report with Demographics.

Let’s imagine that for this scenario, your administrator has requested to see this report as a PDF.

1) Click on the Team content folder and click on the Office of Workforce Development: OWCMS folder. When that folder opens, click on the WIOA folder.

2) Locate the Enrollment Report with Demographics and click on the blue text to Run the report.
3) Select the required/desired criteria for the report and click the **Finish** button.

4) When the next screen displays, **DO NOT** click **Open** to open the report. If you do so, the report will open in the default option of Microsoft Excel.

5) Click on the third button on the left side of the blue **Cognos Connection Toolbar**, the button resembles a “play” button. This button will display a menu of options to run the report.
6) The list of run options displays. Click on Run PDF.

The report will display within Cognos as a PDF. The user can now Save or Print the report.
My Content Folder

The My content folders contain reports that are personalized to the user. These reports allow you to customize, create, organize, and save reports that are specific to your needs. You can also add new folders to create a hierarchy for more levels of organization.

Create a New Folder

1) Navigate to the My content folder. Click on the Plus sign on the right side of the menu to add a new folder.
2) A folder will appear in your list of My content folders with a blinking dash allowing the user to name the new folder.

3) Name this new folder “Training Folder” and press Enter. Training Folder will display in the My content folders.

Copy an Entry to My Content

*Scenario Description– In this scenario, we are going to copy a canned report from the Team content folders into our personal My content folder. When you create a copy of an entry, you create a replica of that report in another location. If you make changes to that report in your My content folder, those changes are not reflected in the Team content folder.

You have no access to make changes to reports in the Team content folder.

For this scenario, we will imagine that we need to make changes to the Exit Report, so we will need to first copy it into our My content folder.

*Refer to this scenario when you want to save canned reports to your My content folders. You may do this for reports you use often or if you want to be able to make a change to a canned report.
Copy an Entry to My Content

1) Click on the WIOA folder link in the Team content section of the Office of Workforce Development: OWCMS folder.

2) In the WIOA folder, locate the Exit Report.

3) Click on the three dot icon on the right-hand side of the Exit Report to open the menu that contains Copy or move and click on Copy or move.

4) Click on the My content folder and select the folder that you want to place the report in.

5) For our scenario, select your Training Folder.

6) Click the Copy to button.

The report will now display in the Training Folder.
Delete a Report from My Content

1) Click on the **Training** folder in the **My content** section.

2) In the **Training** folder, locate the **Exit Report**.

3) Click on the **three dot icon** on the right-hand side of the **Exit Report** to open the menu that contains **Delete** and click on **Delete**.

4) A pop-up box will display prompting the user to confirm the deletion.

If **OK** is selected, the **Exit Report** will be deleted from the **My content** folder. However, the **Exit Report** still exists in the **WIOA** folder in the **Team content** folder.
Create a Report View

A Report View is a reference to another report that has its own properties, prompt values, schedules and results. Report views can be created to share a report specification, instead of making multiple copies of the same report.

From Recent

1) Click on the three dot icon of the WIA Exit Report on your Recent section of the IBM Cognos Analytics Dashboard.

2) When the drop-down menu displays, click on Create report view.
2) A pop-up box displays prompting the user to save the Report View in the My content section. Select the My content folder and click on Training Folder.

3) Name the file “Report view of WIA Exit Report” and click Save.

The Report View of the WIA Exit Report will display in the Training Folder.
Create a Report View

From My content

1) Click on the My content folder and click on the Training Folder.

2) The copied version of the Exit Report should be displayed in the Training Folder.

3) Click on the blue text of the Exit Report.
4) When the report opens, click the **Pencil** icon to edit in **Authoring mode**.

5) Complete the required information on the **Prompt** page to validate the report and click **Finish**.

6) The report update/validate box displays. Click **OK**.

7) The **Save** icon is now available. Click on the drop-down arrow next to the **Save** icon to display **Save as**.

8) Click **Save as**.
9) Save the report into the **My content > Training Folder**.
10) Click **Save**.

1) Click the **Home** button to navigate back to the **IBM Cognos Analytics Dashboard**.
2) Click on the **My content > Training Folder**. Locate the **WIA Exit Report**.

3) Click on the **three-dot icon** and click **Create report view**.
4) **Save as** the report into the **My content > Training Folder**. Click **Save**.

5) A **Report View** of the **WIA Exit Report** has been created.
Schedule a Report

Reports can be scheduled to run at a time that is most convenient for the user. For example, you can schedule a report to run during off hours or when demand in the system is low. When scheduling a report, the user can have it printed, e-mailed, or saved.

The user can schedule a report to run by minute, hourly, daily, weekly, monthly, or yearly. There can only be one schedule for each report, so if multiple schedules for a specific report are required then the user could create report views and a schedule for each report.

After the schedule has been created, the report will run at the time and date specified.

1) Click on **My content** folder

2) Click on the **three dot icon** of the report you would like to **schedule**. A list will display on the right-hand side of the screen.

3) Select **Properties**.
4) A pop-up box will display. Select **Schedule** and click on the **plus** sign **New** button on the right side of the menu to schedule a report.
Prompts in Scheduled Report

The user can schedule the report to run weekly, daily, monthly, etc.

The time period that the user would like the report run can be populated.

The user can select which day of the week they would like the report to be delivered.

The user has the option to choose the delivery format of their report (PDF, Excel, etc.) as well as, choose between delivery options like Save or Email. The user can also choose to set the values for the report prompts in this section.

5) After selecting the desired report criteria, click Create.

6) The report has been scheduled.
Log-Off

1) To log-off, click on the person icon on the right-hand side of the Cognos Connection Toolbar. A drop-down will display. Click on Sign out.

My Account Information Icon

- **My schedules and subscriptions:** The user can view the reports that they have scheduled.

- **My preferences:** The user can set time zone and language preferences.
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tr>
<td>Cognos Connection</td>
<td>The portal interface of Cognos</td>
</tr>
<tr>
<td>CSV</td>
<td>Comma Separated Values (CSV), a file format that contains text data, where the fields in each record are separated by a character, such as a comma or a tab. In Cognos, each record is separated by a tab.</td>
</tr>
<tr>
<td>HTML</td>
<td>Hypertext Markup Language (HTML), a markup language used to structure text and multimedia documents, as well as to set up hypertext links between documents. HTML is used extensively on the World Wide Web.</td>
</tr>
<tr>
<td>PDF</td>
<td>Portable Document Format (PDF), a file format that maintains the formatting of the original document without the program and fonts that were used to create it. In Cognos, you can view and print reports using this format.</td>
</tr>
<tr>
<td>Portal</td>
<td>A website or page that provides a single presentation and a single starting point for a set of information—for example, IBM Cognos Connection.</td>
</tr>
<tr>
<td>Prompt</td>
<td>A report element that asks for parameter values before the report is run.</td>
</tr>
<tr>
<td>Query</td>
<td>A specification for a set of data retrieved from a data source. A report specification can contain one or more queries.</td>
</tr>
<tr>
<td>Query Item</td>
<td>A representation of a column of data in a data source. It contains a reference to a database column, a reference to another query item, or a calculation.</td>
</tr>
<tr>
<td>Report</td>
<td>Report is a generic term for the objects created or edited in Authoring Mode.</td>
</tr>
<tr>
<td>Report Item</td>
<td>A query item added to a report is known as a report item. Report items appear as columns in list reports and as rows and columns in crosstab reports. In charts, report items appear as data markers and axis labels.</td>
</tr>
<tr>
<td>Report Output</td>
<td>Report output combines data at the point in time when the report was run with a report specification. It is a document that can be displayed or printed. IBM Cognos can produce report outputs in HTML, PDF, Excel or CSV formats.</td>
</tr>
<tr>
<td>Report View</td>
<td>A reference to another report that has its own properties, such as prompt values, schedules, and results. You use report views to share a report specification instead of making copies of it.</td>
</tr>
<tr>
<td>Schedule</td>
<td>A specification for a time and date for a report to be ran.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
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</tr>
<tr>
<td>Session</td>
<td>The time during which an authenticated user is logged onto BIC Cognos.</td>
</tr>
<tr>
<td>Sort</td>
<td>Organizing data in a sequential order.</td>
</tr>
<tr>
<td>Summary</td>
<td>In reporting, summaries are aggregate values that are calculated for all the values of a particular level or dimension. Examples of summary types are: total, minimum, maximum, average, and count.</td>
</tr>
<tr>
<td>Tables</td>
<td>Structures in a database that contain data organized into rows and columns. In a model, query subjects represent tables.</td>
</tr>
<tr>
<td>Template</td>
<td>A reusable report layout or style that can be used to set the presentation of a report or query.</td>
</tr>
<tr>
<td>XML</td>
<td>A language that uses markup symbols or tags to create descriptions of the structure of data. Unlike HTML, XML is extensible because the tags aren't predefined or limited.</td>
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For additional information on BIC Cognos reports or to request training, please contact:

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