

Using the Agency Encounter Details and Summary Report in COGNOS

March 2017

Connecting to COGNOS

<https://reports.finance360.org>

Internet Browser

You **MUST** use Windows **Internet Explorer**
To connect to COGNOS



COGNOS will not open/work properly using other browsers such as Google Chrome



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Navigating COGNOS

After Login,

Click on My Home



Navigating COGNOS



Click on the report folder
in the first tab called:
Public Folders

Click on **AGENCY
SUPERVISOR REPORTS**

Navigating COGNOS

Click on Encounter

Attendance Summary and Details

The screenshot shows the IBM Cognos Connection web interface. At the top, there is a dark header bar with the text "IBM Cognos Connection" in white. Below this, there are two tabs: "Public Folders" (which is selected and highlighted with a blue border) and "My Folders". Under the "Public Folders" tab, the breadcrumb path "Public Folders > AGENCY SUPERVISOR REPORTS" is displayed. Below the breadcrumb, there is a table-like structure with a header row and one data row. The header row has a checkbox on the left and the text "Name" with a small diamond icon. The data row has a checkbox on the left, a small green icon with a white document symbol, and the text "Encounter Attendance Summary and Details". A large red arrow points to the "Encounter Attendance Summary and Details" text in the data row.

☐	Name
☐	 Encounter Attendance Summary and Details

ENCOUNTER DATA - SUMMARY

Service Date Range: FROM: * Feb 10, 2017 TO: * Feb 10, 2017 *Required*
(You can type a date in format mm/dd/yyyy or select the date from the Calendar View by clicking on the calendar icon)

Service Type: * *Required*

- ☐ Adapted Physical Education
- ☐ Assistive Technology Services
- ☐ Audiology Services
- ☐ Counseling Services
- ☐ ESL
- ☐ Hearing Education Services
- ☐ Interpreting Services - Oral Transliterator
- ☐ Interpreting Services - Sign Language Interpreter
- ☐ Medical Services
- ☐ Occupational Therapy
- ☐ Orientation and Mobility Services
- ☐ Other
- ☐ Paraprofessional
- ☐ Physical Therapy
- ☐ Psychological Services
- ☐ School Health Services
- ☐ School Nurse Services
- ☐ School Social Work
- ☐ Special Education Teacher Support Services (SETSS)
- ☐ Speech-Language Therapy
- ☐ Travel Training
- ☐ Vision Education Services

[Select all](#) [Deselect all](#)

* Required: Service Date Range (You may type dates in mm/dd/yyyy format or use calendar)

* Required: You may click on one or more Service Type

You can Select All or Deselect All , but PLEASE NOTE: Selecting All will slow down the speed of the report

*Required Information

When using the report, only 2 of the 6 sections need to be completed to run the report. Those sections are the “**Service Date Range**” & “**Service type.**” You may select multiple “Service Types” - Although, **Please Note** that the time it takes for the report to run will increase with the number of criteria chosen.

Optional Areas

The other areas of the report are for further specifying the criteria you want the report to process. Each of the following areas are **optional**:

- Student ID (OSIS)
- Provider SESIS User ID
- District
- School DBN (6 digit DBN ##X###)

Student ID:		Optional			
Provider's SESIS User ID:		Optional			
District	☐ 00 ☐ 01 ☐ 02 ☐ 03 ☐ 04 ☐ 05 ☐ 06 ☐ 07 ☐ 08 ☐ 09	Optional Select all Deselect all			
School DBN Location:	Type school DBN code on left side, hit the insert button and then repeat for additional selections. <table border="1"> <tr> <td> Format: ##X### </td> <td> Insert </td> <td> Choices: Remove </td> </tr> </table> Select all Deselect all		Format: ##X###	Insert	Choices: Remove
Format: ##X###	Insert	Choices: Remove			

Additional Information

NOTE: Multiple selections made in the “Service Type” area will increase the wait time for your report to generate.

If you choose to Email the Report, **remove the default email address** that appears on the “TO” line **and type your own email address**.

The report returns two separate tabs within the same Excel worksheet. First tab will provide a summary of encounter record counts by provider/session types. Second tab will provide the encounter record details.

Excel Report – Summary_1 Tab

Summary 1 Tab Displays:

- Report Parameters
- Recap of Service Encounters per Service Type and Provider

2: Agency Encounter Details and Summary Report [Read-Only] - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW DEVELOPER

From Access From Web From Text From Other Sources * Get External Data Existing Connections Refresh All * Properties Edit Links Connections Sort & Filter Filter Clear Reapply Advanced Text to Columns Flash Fill Remove Duplicates Validation * Data Tools Consolidate What-If Analysis * Relationships Group Ungroup Subtotal Outline

A14

ENCOUNTER ID RECORD COUNTS BY SESSION TYPES - REPORT AS OF: Feb 14, 2017						
SOURCE: EA Files from Oracle 'Semantic' SESIS Database Tables						
Criteria Values Selected:						
Service Date Range: Dec 1, 2016 - Dec 31, 2017						
Service Type(s): Adapted Physical Education, Assistive Technology Services, Audiology Services, Counseling Services, ESL, Hearing Education Services, Interpreting Services - Oral Transliterator, Interpreting Services - Sign Language Interpreter, Medical Services, Occupational Therapy, Orientation and Mobility Services, Other, Paraprofessional, Physical Therapy, Psychological Services, School Health Services, School Nurse Services, School Social Work, Special Education Teacher Support Services (SETSS), Speech-Language Therapy, Travel Training, Vision Education Services						
District(s): 00, 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 75, 79, 84, Y9, Z9						
Location(s):						
Student: 123456789						
Service Type	FY of Service	Provider Last Name	Provider First Name	Service Provided	Total	
Occupational Therapy	2017	PIZZA		3	3	
Physical Therapy	2017	APPLE		3	3	
Total				6	6	

SUMMARY_1 DETAILS_2

READY

Excel Report – Details_2 Tab

Details 2 Tab Displays:

- Full Details For Each Encounter

1	DETAIL ENCOUNTER DATA									
2	SOURCE: EA Files from Oracle 'Semantic' SESIS Database Tables									
3	Row Number	Fiscal Year	SERVICE_TYPE_DESC	SESSION_TYPE_DESC	STUDENT_SCHOOL_DBN	STUDENT_ID	STUDENT_FIRST_NAME	STUDENT_LAST_NAME	SERVICE_DATE	PROVIDER'S SES
4	1	2017	Occupational Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/6/16	APPLE1
5	2	2017	Occupational Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/13/16	APPLE1
6	3	2017	Occupational Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/22/16	APPLE1
7	4	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/5/16	PIZZA2
8	5	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/9/16	PIZZA2
9	6	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/19/16	PIZZA2
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
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24										

Excel Report – Preparing for Filter

Details 2 Tab Has 2 Merged Rows at the top

- In order to be able to Filter this report, you must delete Rows 1 & 2

**Highlight
Rows #1&2
in the
Margin,
Right Click,
Delete**

Row Number	Fiscal Year	SERVICE_TYPE_DESC	SESSION_TYPE_DESC	STUDENT_SCHOOL_DBN	STUDENT_ID	STUDENT_FIRST_NAME	STUDENT_LAST_NAME	SERVICE_DATE	PROVIDER'S SES
1	2017	Occupational Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/6/16	APPLE1
2	2017	Occupational Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/13/16	APPLE1
3	2017	Occupational Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/22/16	APPLE1
4	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/5/16	PIZZA2
5	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/9/16	PIZZA2
6	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/19/16	PIZZA2

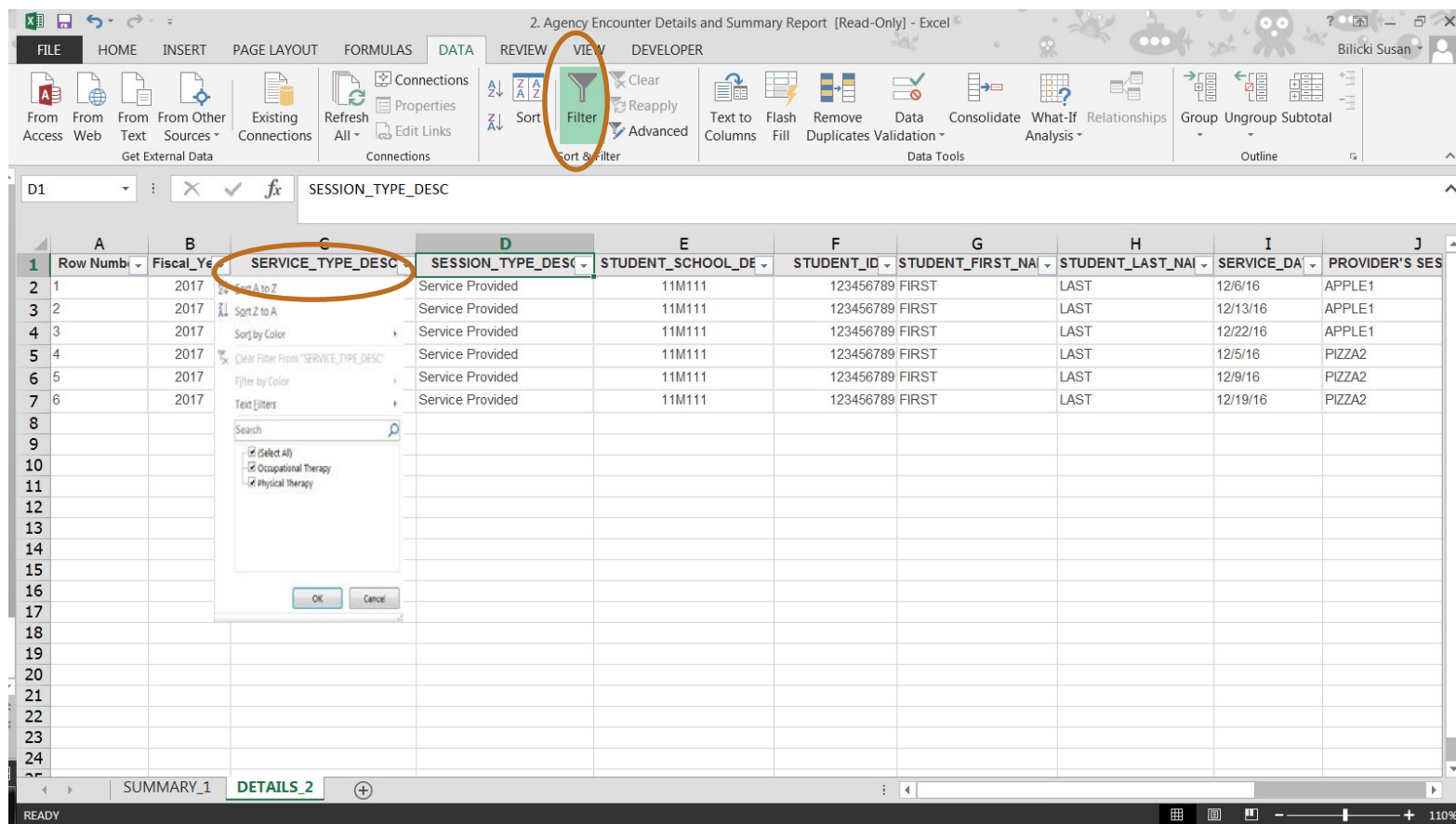
Excel Report – Preparing for Filter

With the first 2
rows gone,

Click on any
heading then

Click on Filter
to add filters
to all columns

Click the 
to the right of the
heading filter



The screenshot shows the Excel interface with the 'DATA' ribbon selected. The 'Filter' button, represented by a funnel icon, is circled in the ribbon. Below the ribbon, the 'SERVICE_TYPE_DESC' column header is also circled, and its dropdown filter menu is open, showing options like 'Sort A to Z', 'Sort Z to A', 'Filter by Color', and a list of service types: 'Physical Therapy', 'Occupational Therapy', and 'Speech Therapy'.

Row Number	Fiscal Year	SERVICE_TYPE_DESC	SESSION_TYPE_DESC	STUDENT_SCHOOL_DE	STUDENT_ID	STUDENT_FIRST_NA	STUDENT_LAST_NA	SERVICE_DA	PROVIDER'S SES
1	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/6/16	APPLE1
2	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/13/16	APPLE1
3	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/22/16	APPLE1
4	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/5/16	PIZZA2
5	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/9/16	PIZZA2
6	2017	Physical Therapy	Service Provided	11M111	123456789	FIRST	LAST	12/19/16	PIZZA2

Thank You

This concludes our presentation