NYC Department of Education

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

Using the Agency Encounter Details and Summary Report in COGNOS

Navigating COGNOS

After Login,

Click on **My Home**

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Navigating COGNOS

IBM Cognos Connection

Public Folders   My Folders

Public Folders

	Name ◇
☐	📁 AGENCY SUPERVISOR REPORTS
☐	📁 CATALOGS / PACKAGES

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

Click on **AGENCY SUPERVISOR REPORTS**

Using the Agency Encounter Details and Summary Report in COGNOS

Navigating COGNOS

Click on Encounter Attendance Summary and Details

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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 t

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.

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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###)

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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.

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Excel Report – Summary_1 Tab

Summary 1 Tab Displays:

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

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Excel Report – Details_2 Tab

Details 2 Tab Displays:

- Full Details For Each Encounter

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

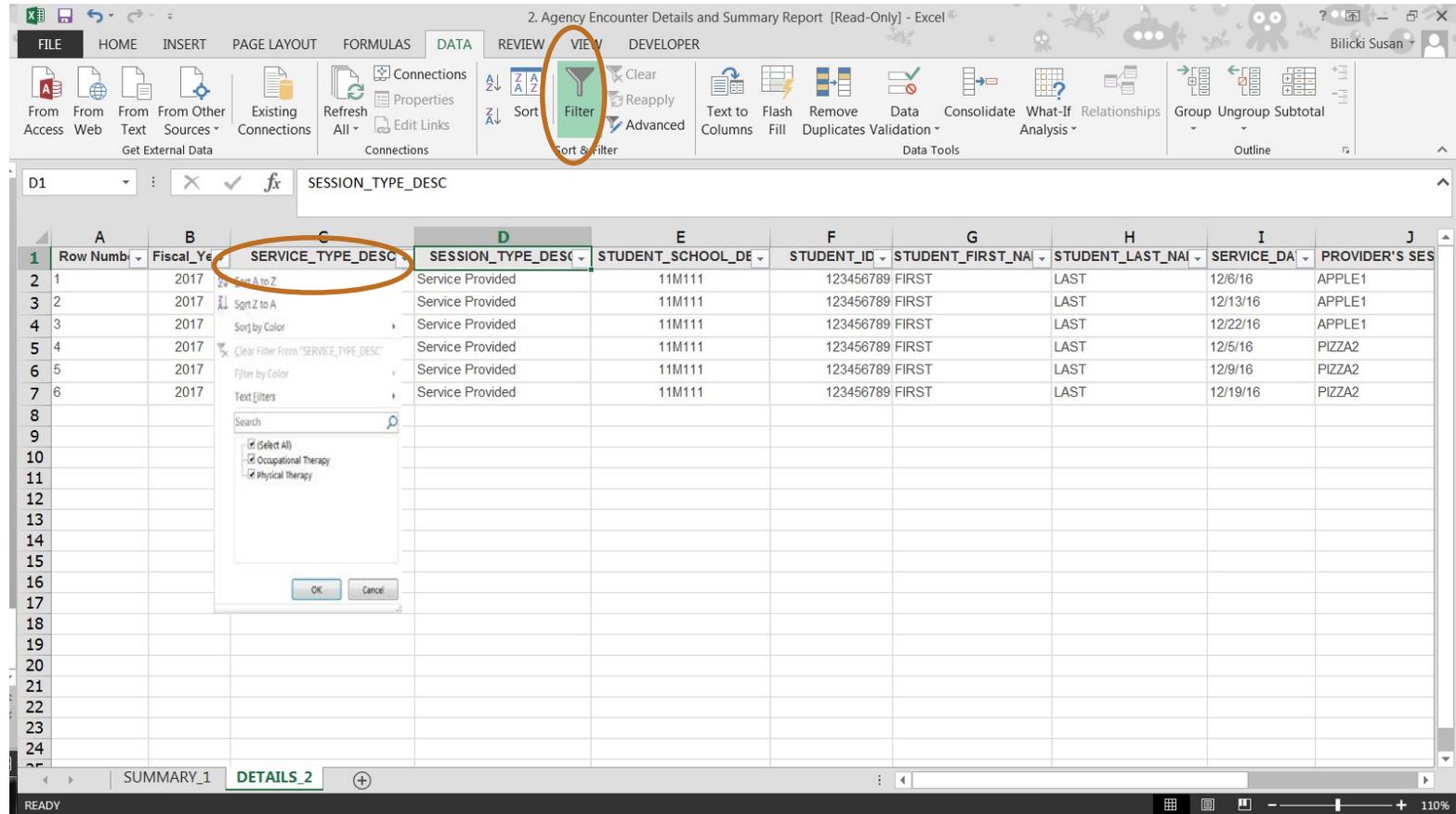*Highlight Rows #1&2 in the Margin, Right Click, Delete*

Using the Agency Encounter Details and Summary Report in COGNOS
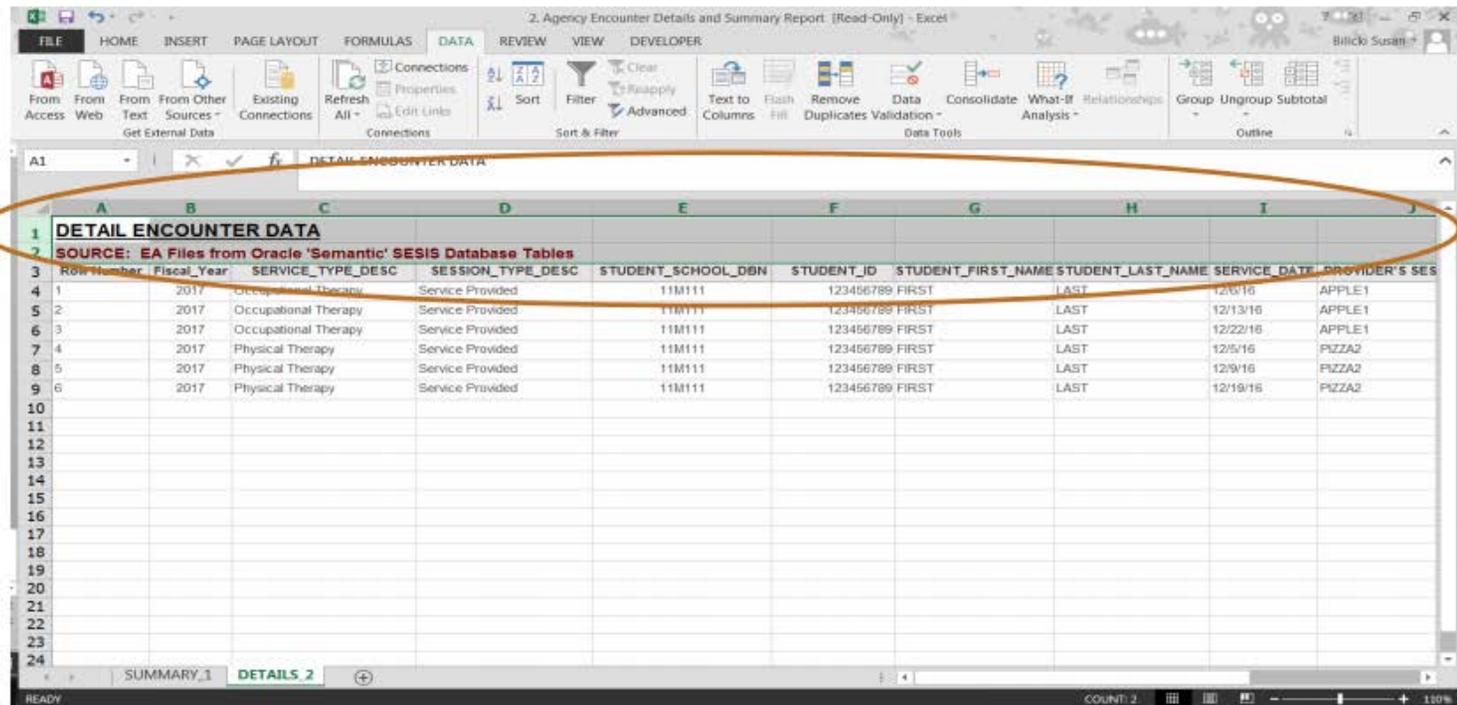
Excel Report – Preparing for Filter

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

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Thank You

This concludes our presentation

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