

# 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**

IBM

## IBM Cognos Software

User2 Test [Log Off](#)

### My Content

-   My home
-  IBM Cognos content
-  My Inbox

### My Actions

-  Create workspaces on the web

Show this page in the future

# Navigating COGNOS

The screenshot shows the IBM Cognos Connection interface. At the top, there is a dark header with the text "IBM Cognos Connection". Below the header, there are two tabs: "Public Folders" and "My Folders". The "Public Folders" tab is highlighted with a red oval. Below the tabs, the text "Public Folders" is displayed. A list of folders is shown below, with a red arrow pointing to the "AGENCY SUPERVISOR REPORTS" folder. The list has a header row with a checkbox and the text "Name" with a sort icon. The folders listed are "AGENCY SUPERVISOR REPORTS" and "CATALOGS / PACKAGES".

| <input type="checkbox"/> | Name                      |
|--------------------------|---------------------------|
| <input type="checkbox"/> | AGENCY SUPERVISOR REPORTS |
| <input type="checkbox"/> | CATALOGS / PACKAGES       |

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 interface. At the top, there is a dark header with the text 'IBM Cognos Connection'. Below this, there are two tabs: 'Public Folders' (which is selected) 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 with a header row and one data row. The header row has a checkbox, a vertical line, and the text 'Name' with a small diamond icon. The data row has a checkbox, a document icon with a blue arrow, and the text 'Encounter Attendance Summary and Details'. A large red arrow points to the 'Encounter Attendance Summary and Details' entry.

| <input type="checkbox"/> | Name   |
|--------------------------|--|
| <input type="checkbox"/> |  Encounter Attendance Summary and Details |

**ENCOUNTER DATA - SUMMARY**

Service Date Range: FROM:  TO:  *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)*

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Service Type: *Required*

- Adapted Physical Education
- Assistive Technology Services
- Audiology Services
- Counseling Services
- ESL
- Hearing Education Services
- Interpreting Services - Oral Translator
- 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](#)

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Provider's SESIS User ID:  [Optional](#)

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District [Optional](#)

|                          |    |
|--------------------------|----|
| <input type="checkbox"/> | 00 |
| <input type="checkbox"/> | 01 |
| <input type="checkbox"/> | 02 |
| <input type="checkbox"/> | 03 |
| <input type="checkbox"/> | 04 |
| <input type="checkbox"/> | 05 |
| <input type="checkbox"/> | 06 |
| <input type="checkbox"/> | 07 |
| <input type="checkbox"/> | 08 |
| <input type="checkbox"/> | 09 |

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

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School DBN Location:  [Optional](#)

Format:  [Optional](#)

##X###

Choices:

Insert 

Remove 

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

## 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

The screenshot shows an Excel spreadsheet with the following content:

**1 ENCOUNTER ID RECORD COUNTS BY SESSION TYPES - REPORT AS OF: Feb 14, 2017**  
**2 SOURCE: EA Files from Oracle 'Semantic' SESIS Database Tables**  
**3 Criteria Values Selected:**  
**4 Service Date Range: Dec 1, 2016 - Dec 31, 2017**  
**5**  
**6 Service Type(s):** Adapted Physical Education, Assistive Technology Services, Audiology Services, Counseling Services, ESL, Hearing Education Services, Interpreting Services - Oral Transliterator,  
**7 Interpreting Services - Sign Language Interpreter, Medical Services, Occupational Therapy, Orientation and Mobility Services, Other, Paraprofessional, Physical Therapy, Psychological Services,**  
**8 School Health Services, School Nurse Services, School Social Work, Special Education Teacher Support Services (SETSS), Speech-Language Therapy, Travel Training, Vision Education Services**  
**9**  
**10 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,  
**11 25, 26, 27, 28, 29, 30, 31, 32, 75, 79, 84, Y9, Z9**  
**12 Location(s):**  
**13 Student: 123456789**  
**14**

| 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        |
| <b>Total</b>         |               |                    |                     | <b>6</b>         | <b>6</b> |

# Excel Report – Details\_2 Tab

## Details 2 Tab Displays:

- Full Details For Each Encounter

The screenshot shows an Excel spreadsheet with the following data:

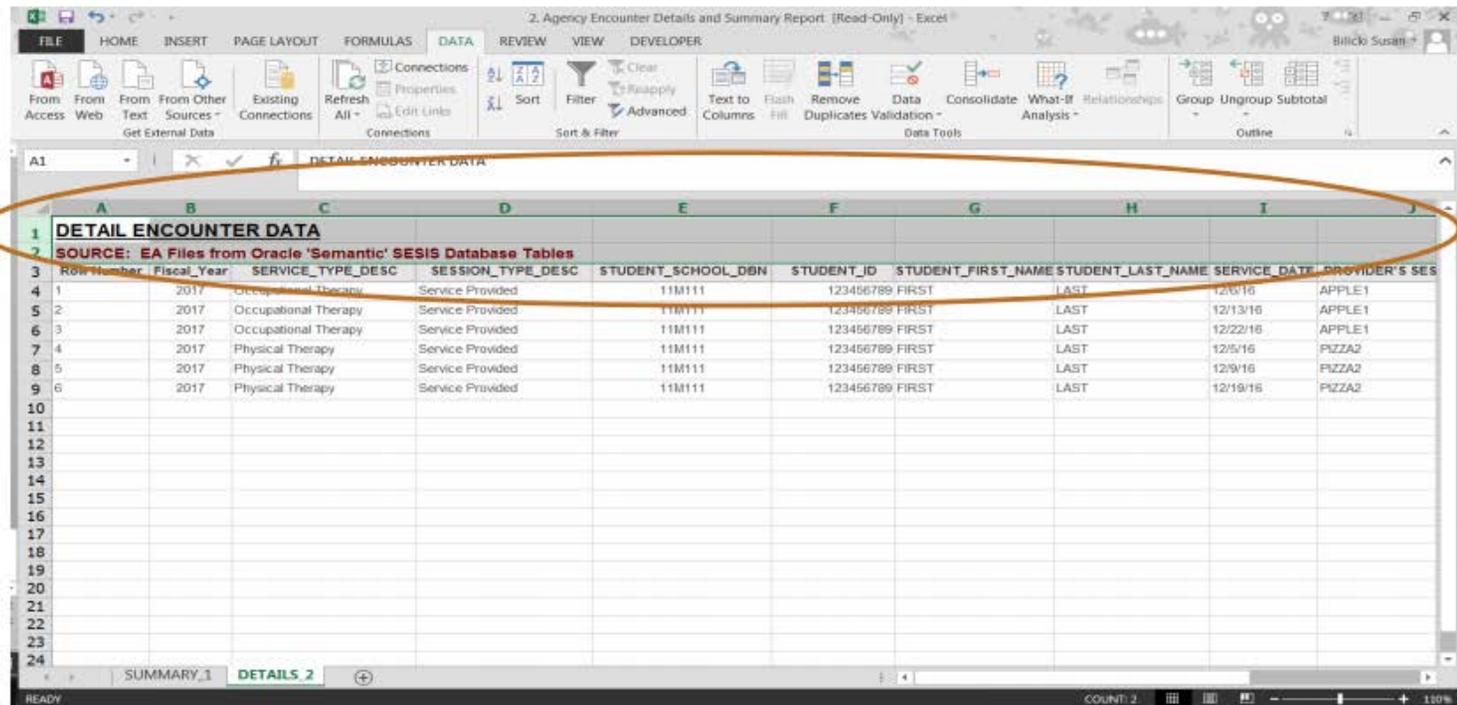
| Row Number | Fiscal_Year | SERVICE_TYPE_DESC    | SESSION_TYPE_DESC | STUDENT_SCHOOL_DBN | STUDENT_ID | STUDENT_FIRST_NAME | STUDENT_LAST_NAME | SERVICE_DATE | PROVIDER'S SES |
|------------|-------------|----------------------|-------------------|--------------------|------------|--------------------|-------------------|--------------|----------------|
| 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

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*



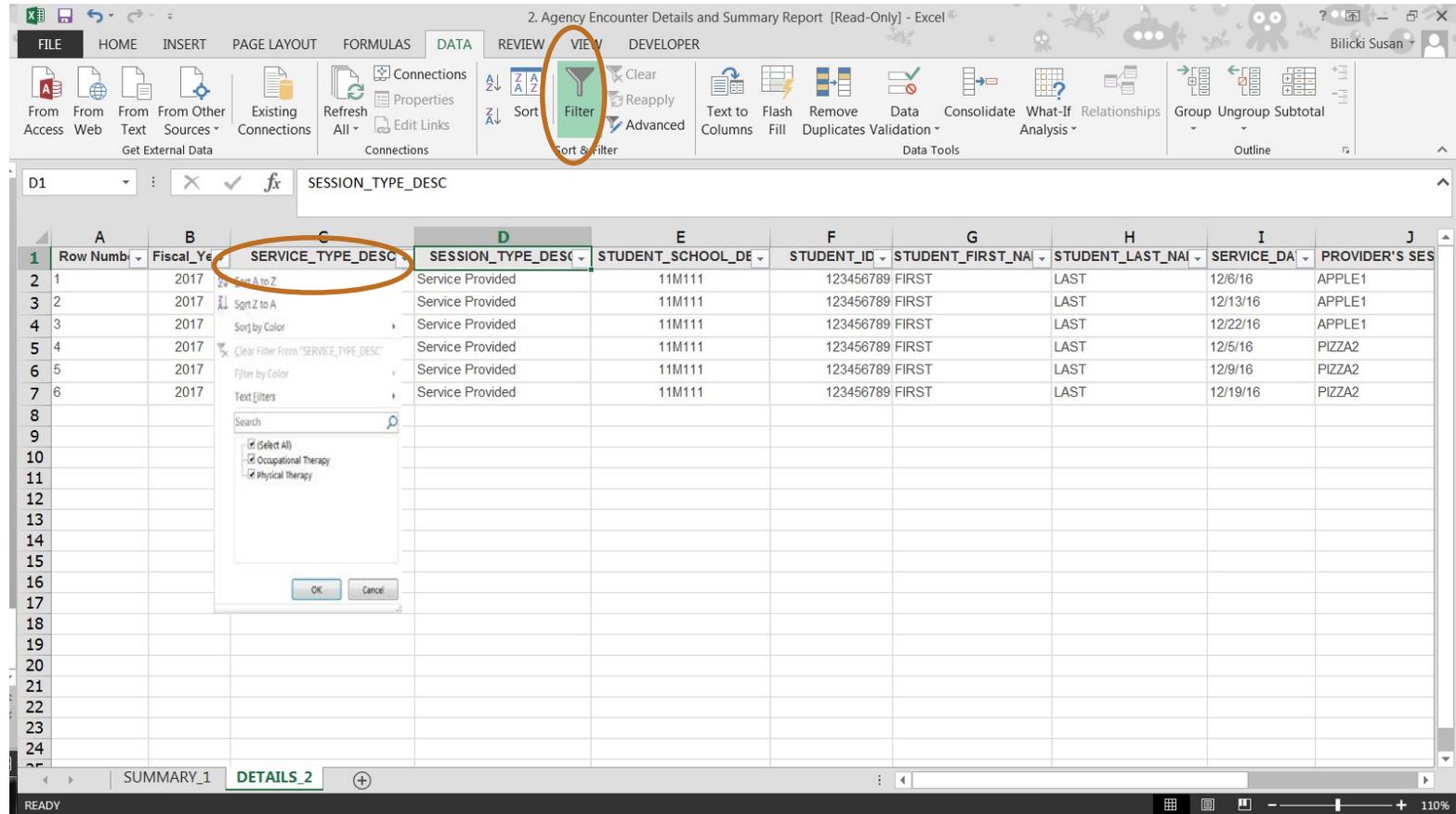
# Excel Report – Preparing for Filter

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 Microsoft Excel interface with the 'VIEW' ribbon selected. The 'Filter' button is circled in orange. Below the ribbon, the 'SERVICE\_TYPE\_DESC' column header is also circled in orange, and its filter dropdown menu is open, showing a search box and three checked options: '(Select All)', 'Occupational Therapy', and 'Physical Therapy'. The spreadsheet data includes columns for Row Number, Fiscal Year, Service Type Description, Session Type Description, Student School, Student ID, Student Name, Service Date, and Provider's Name.

| 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        | Service Provided  | Service Provided  | 11M111            | 123456789  | FIRST            | LAST            | 12/6/16    | APPLE1         |
| 2          | 2017        | Service Provided  | Service Provided  | 11M111            | 123456789  | FIRST            | LAST            | 12/13/16   | APPLE1         |
| 3          | 2017        | Service Provided  | Service Provided  | 11M111            | 123456789  | FIRST            | LAST            | 12/22/16   | APPLE1         |
| 4          | 2017        | Service Provided  | Service Provided  | 11M111            | 123456789  | FIRST            | LAST            | 12/5/16    | PIZZA2         |
| 5          | 2017        | Service Provided  | Service Provided  | 11M111            | 123456789  | FIRST            | LAST            | 12/9/16    | PIZZA2         |
| 6          | 2017        | Service Provided  | Service Provided  | 11M111            | 123456789  | FIRST            | LAST            | 12/19/16   | PIZZA2         |

# Thank You

This concludes our presentation