Reports - running and scheduling reports

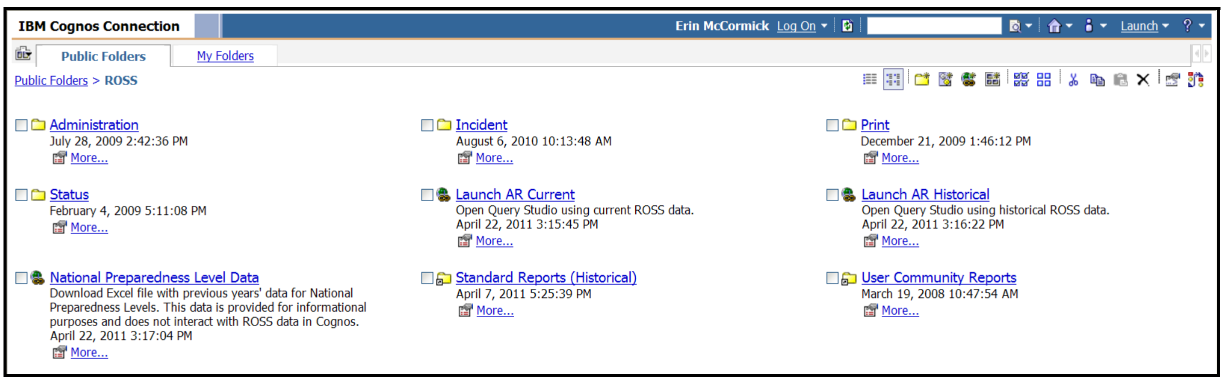
This chapter explains how to run and schedule reports available in ROSS. Topics in this chapter include:

- Getting started
- Working with Standard reports
- Working with User Community reports
- Scheduling a Report View
- Saving a report to your personal computer
- Using Citrix to access ROSS.

To access ROSS Reports

- On the **Administration** menu, click **Reports**.

IBM Cognos Connection screen - Public Folders tab



Getting started

This section provides an overview of Cognos terminology and toolbars. It also explains how to set up and organize your personal computer for ROSS Reports and Cognos. Topics include:

- Logging off of Cognos
- Understanding Cognos toolbars
- Setting up your personal computer for Cognos
- Organizing your reports.

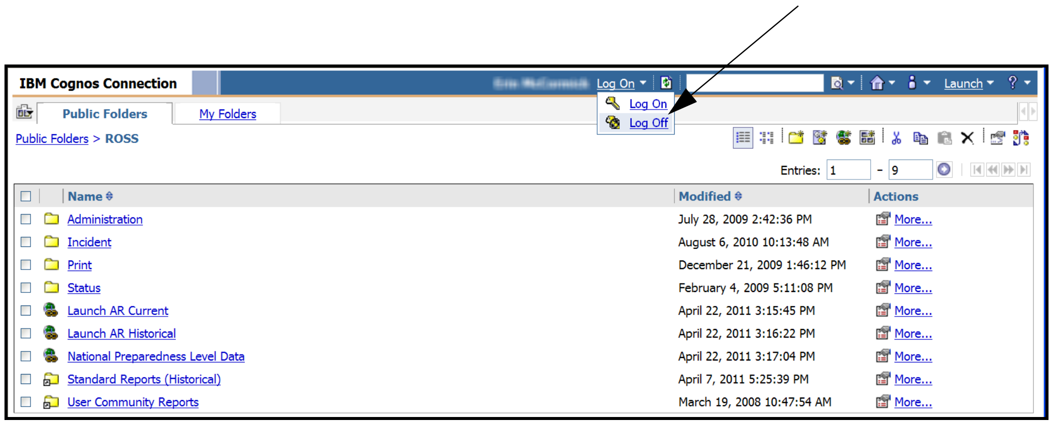
Logging off Cognos

To prevent unauthorized persons working in your Cognos profile you must close your Cognos Internet Explorer session when finished with Reports. This is basic security protocol similar to logging out of ROSS and prevents unauthorized use of your ROSS profile.

To log off Cognos and return to ROSS

- On the **IBM Cognos Connection** toolbar, click the **Log On** drop-down arrow, and then click **Log Off**.

The following diagram shows the IBM Cognos Connection toolbar. The arrow points to the Log Off link.



Understanding Cognos toolbars

The appearance of a Cognos toolbar is dependent on *where you are* in your report creation process. There are two distinct toolbars that may display on your screen for Standard and User Community Reports, including:

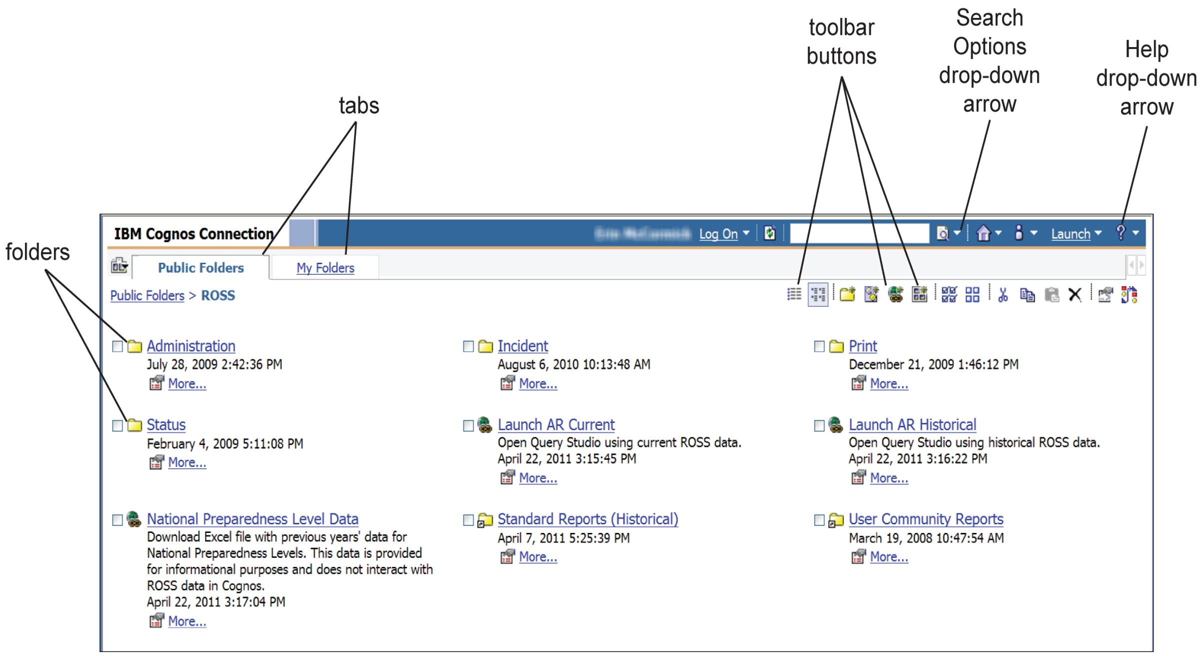
- IBM Cognos Connection toolbar
- Cognos Viewer toolbar.

Working with the IBM Cognos Connection toolbar

After selecting Reports from the Administration menu, your browser opens a new window and displays the IBM Cognos Connection toolbar. The buttons and drop-down arrows function in the same way as in other web-based applications.

If you are unable to access Cognos after selecting Reports from the Administration menu, contact your System Administrator. You may need to add the Cognos site to your "Trusted Sites" on your Internet browser. For more information refer to the quick reference card, "Adding Cognos to Your Trusted Sites."

The following diagram shows some of the common elements and terminology on the IBM Cognos Connection toolbar as displayed User Community reports.

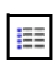


To refresh your report listing

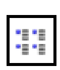
- On the **IBM Cognos Connection** toolbar, click the **Refresh** button.

To change the view of your current session

To change the default view for all your Cognos sessions see, "Changing your default view preference," in the section, "Setting up your personal computer for Cognos," later in this guide.



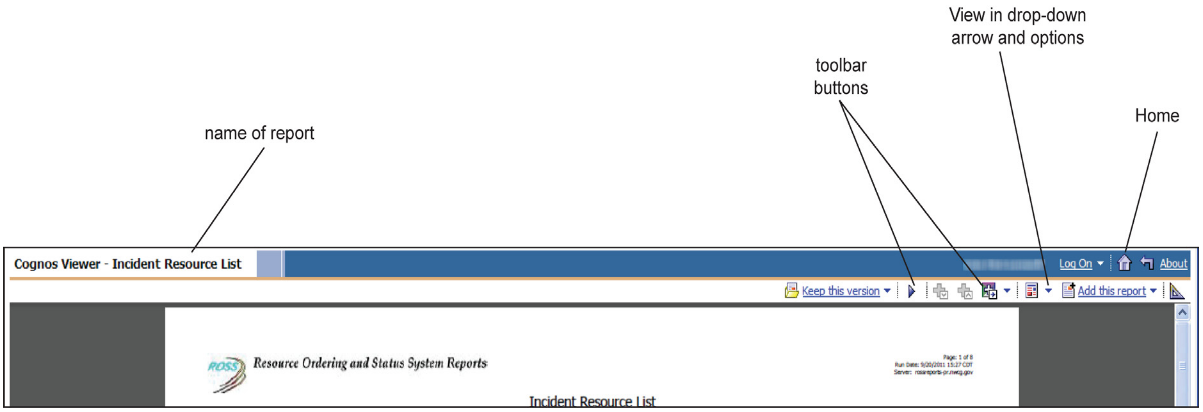
1. On the **IBM Cognos Connection** toolbar, click the **List View** button to view the Standard reports as a list.



2. To view the details of the Standard reports, click the **Details View** button.

Working with the Cognos Viewer toolbar

The Cognos Viewer toolbar groups the following similar functions into drop-down menus. The following diagram outlines the functions available from these drop-down arrows.



Setting up your personal computer for Cognos

This section outlines some common tasks to perform before running ROSS Reports and Cognos for the first time. Tasks include:

- To change your default time zone preference
- To enable all downloads for your Internet Explorer browser
- To download Acrobat Reader X.

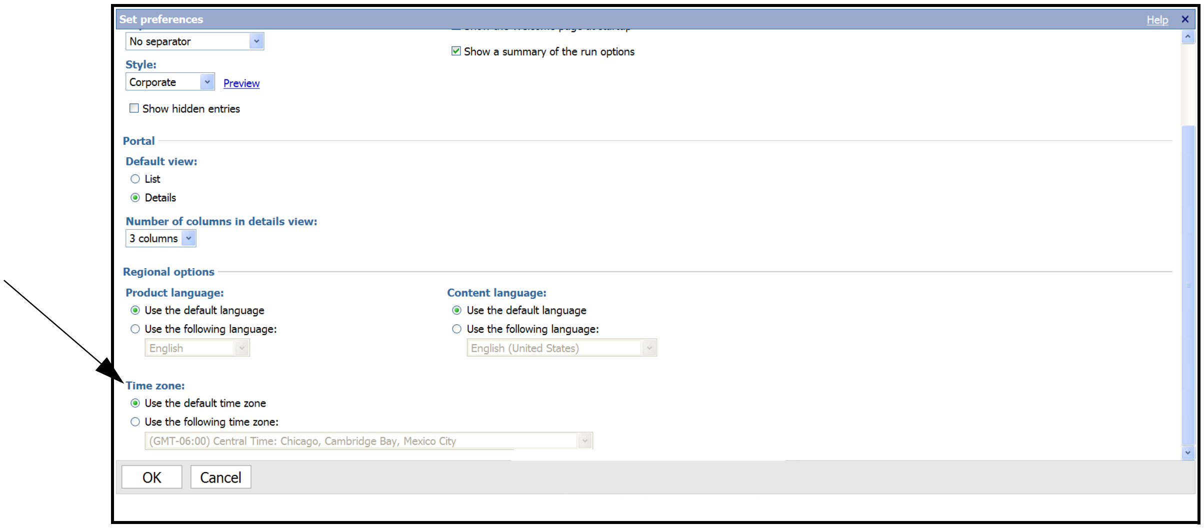
You can also change the view for your current Cognos session by clicking the List View button or the Details View button, which are located on the IBM Cognos Connection toolbar.

To change your default time zone preference

The time zone you select determines when scheduled reports will run. Be sure you specify the correct time zone for your area and for your needs!

1. On the **IBM Cognos Connection** toolbar, click the **My Area** drop-down arrow, and then click **My Preferences**.
2. Under **Time zone**, click to select **Use the following time zone**.
3. Click the **Time zone** drop-down arrow, and then click to select the **time zone** of your choice.
4. Click **OK**.

The following diagram shows the lower portion of the Set preferences screen. The arrow points to the Time zone field.



To enable all downloads for your Internet Explorer browser

If you choose to save your reports in Excel 2000 single sheet or Excel 2002, you must enable all "Downloads" on your Internet Explorer browser. You may need Administrator access to perform this task!

1 Start your Internet browser.

2 On the **Tools** menu, click **Internet Options**.

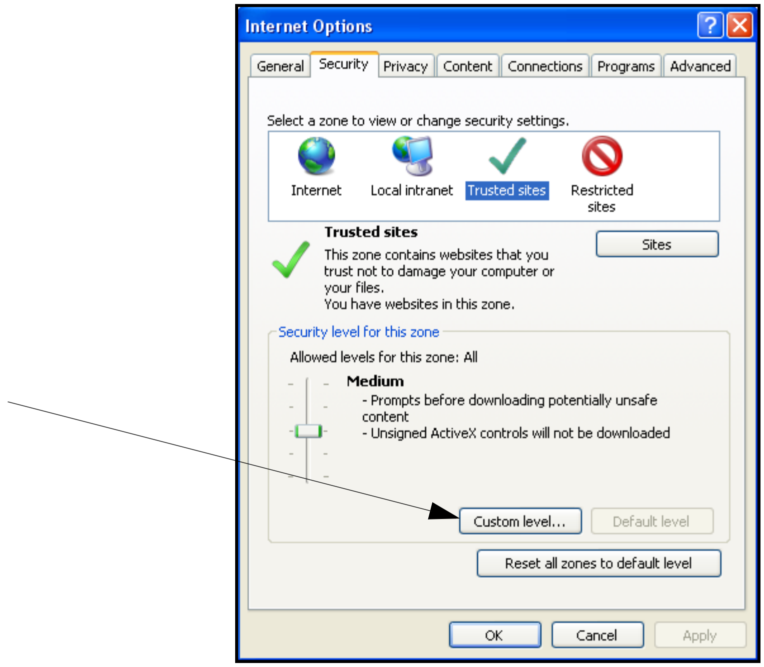
3 On the **Internet Options** dialog box, click the **Security** tab, and then click the **Custom Level** button.

4 On the **Security Settings** dialog box, scroll to **Downloads**, click to select the **Enable** button for the following, and then click **OK**

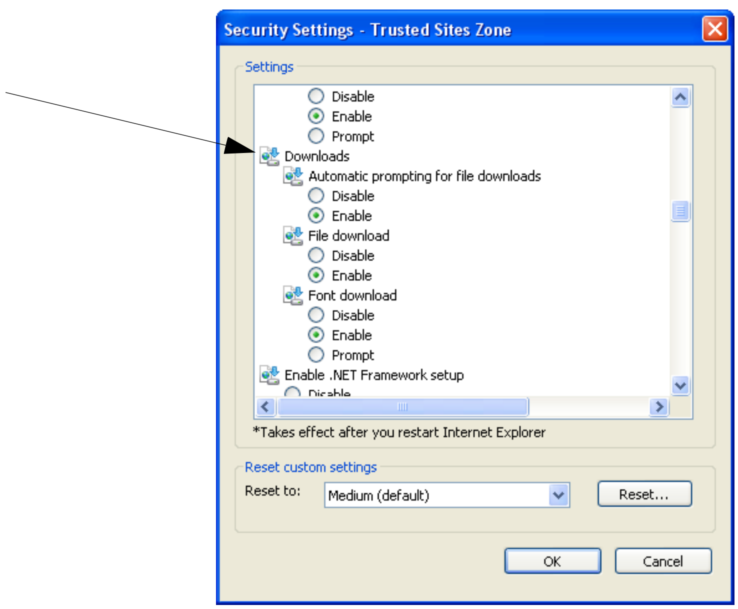
- File download
- Font download
- Automatic prompting for file downloads.

5 On the **Internet Options** dialog box, click **OK**.

The following diagram shows the Internet Options dialog box. The arrow points to the Custom Level button.



The following diagram shows the Security Settings dialog box. The arrow points to the Downloads options.



To download Acrobat Reader X

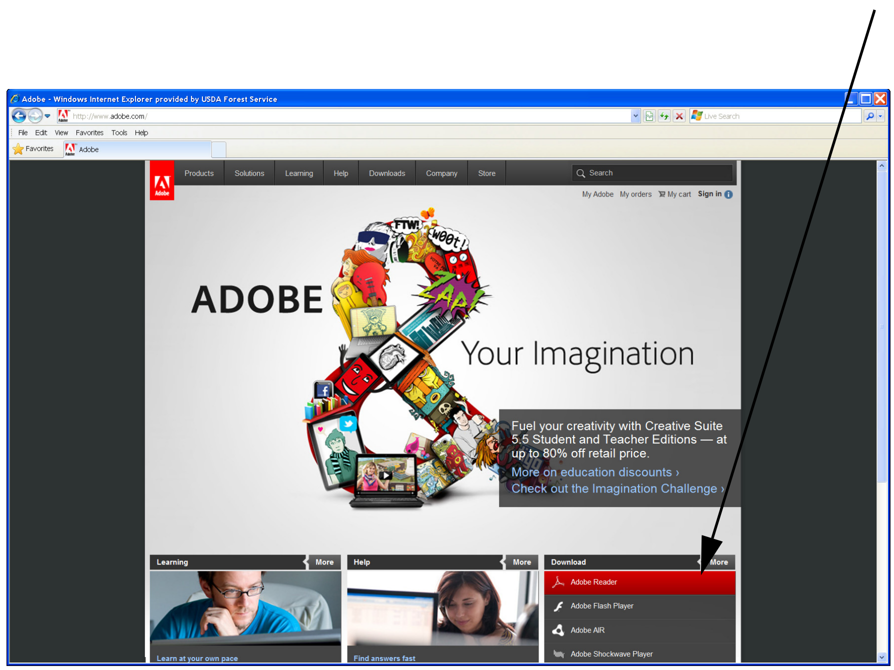
You may already have Acrobat Reader X installed on your personal computer! If so, you do not need to perform this task! You must have Administrator rights to install Acrobat Reader X on to your personal computer.

1. Start your Internet browser, and then type the following address in the **Address** bar:

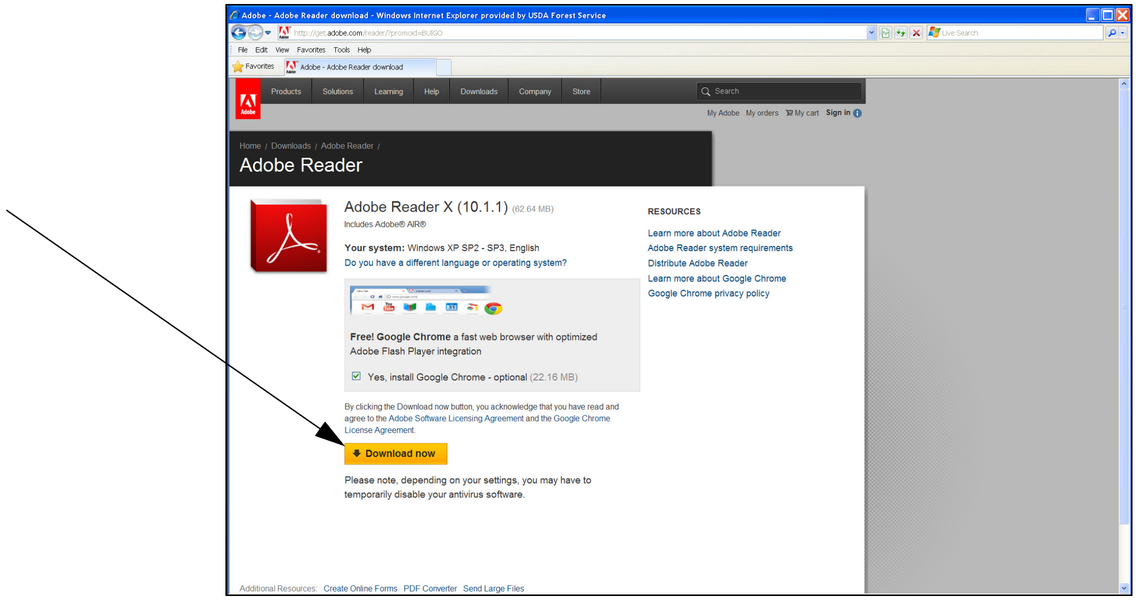
   http://www.adobe.com

2. Under **Downloads** click **Adobe Reader**.
3. On the **Adobe Reader** page, click the **Download now** button.
4. Complete the installation as instructed on the

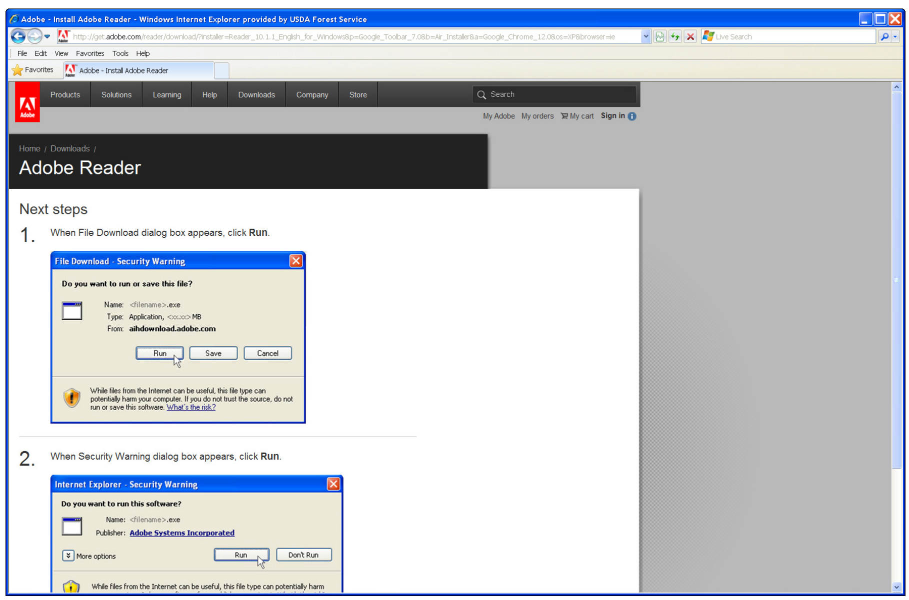
The following diagram shows the Adobe.com main web page. The arrow points to the Adobe Reader download.



The following diagram shows the Acrobat Reader page. The arrow points to the Download now button.



The following diagram shows the Adobe Reader page that lists the instructions for downloading and installing Acrobat Reader X on to your personal computer.



Organizing your reports

This section explains how to perform the following:

- view available Cognos reports by list or by details
- create a new folder in My Folders
- move a report to another folder in My Folders
- change the order of the report listing in My Folders
- bookmark a report.

To view report details along with report name

The initial setting for the Portal-Default view is "List." Select the "List" option to view a list of available reports. Select the "Details" option to view available reports along with brief descriptions.

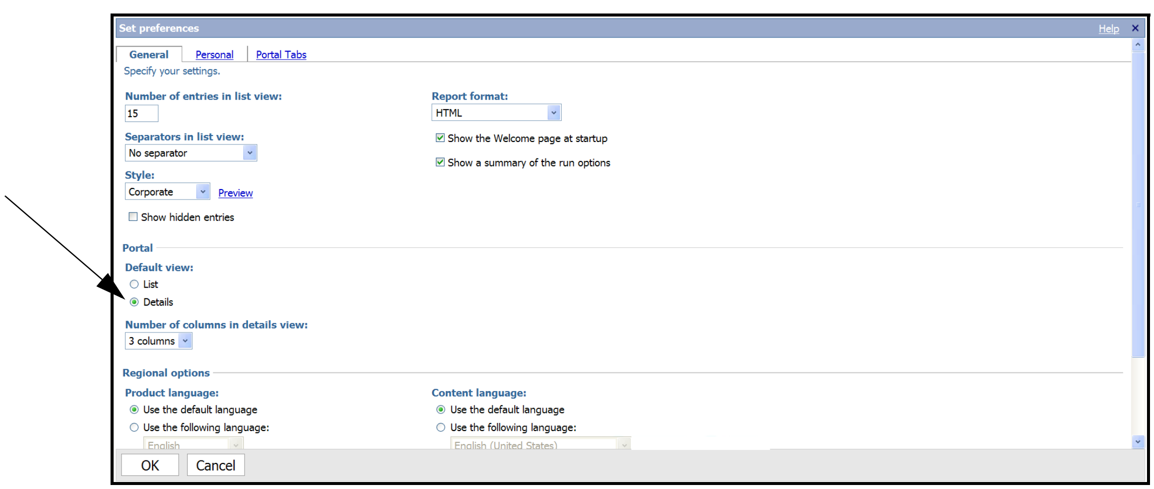
1 On the **IBM Cognos Connection** toolbar, click the **My Area** drop-down arrow, and then click **My Preferences**.

2 Under **Default view**, click **Details**.

3 Click **OK**.

The following diagram shows IBM Cognos Connection toolbar. The arrow points to the location of the My Area drop-down arrow and menu options.

The following diagram shows the Set preferences screen. The arrow points to the Details option under Default view.



The following diagram shows a detail view of reports available in the User Community Reports folder.

To create a new folder for organizing your reports

1 On the **IBM Cognos Connection** toolbar, click the **New Folder** button.

2 On the **New Folder Wizard** screen, complete the following text boxes

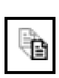
- Name
- Description
- Screen tip.

3 If not already selected, click **My Folders**, and then click the **Finish** button.

The following diagram shows the New Folder Wizard screen.

To move a report to a different folder

1 Click the **More** link that corresponds to the report of your choice.

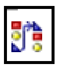


2 On the **Perform an action** screen, click the **Move** button or the **Move** link.

3 On the **Select a location** screen, click to select the **folder** of your choice, and then click **OK**.

The following diagram shows the **Select a location** screen.

To change the order of your report listing

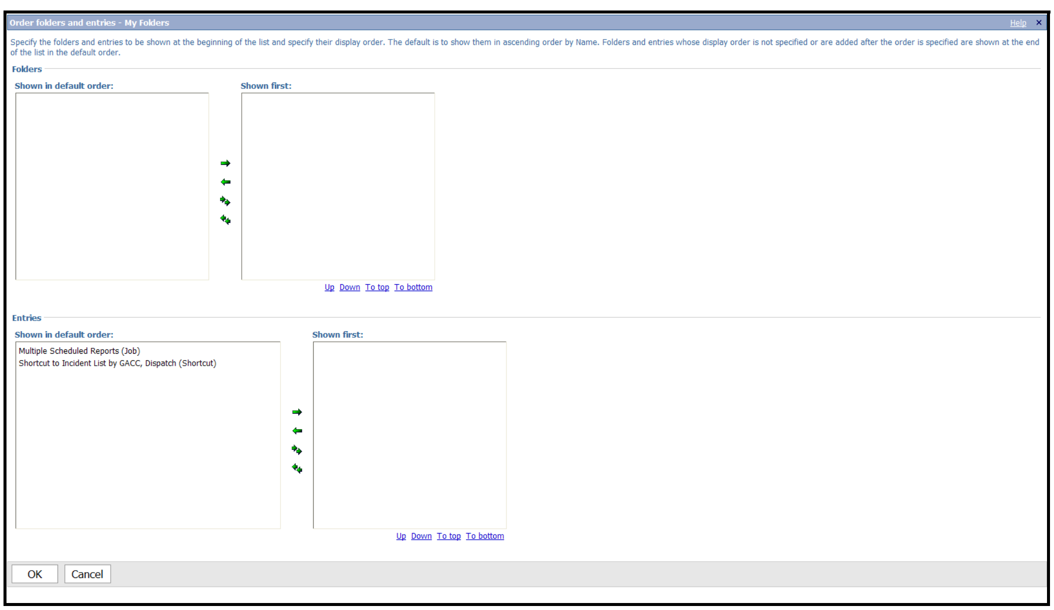


1. In **My Folders**, click the **Order** button on the **IBM Cognos Connection** toolbar.
2. On the **Order folders and entries** screen under **Folders-Shown in default order**, click to select one or more **folder(s)** that you want to change the order of, and then click the **Add** button.

Each folder is added to the bottom of the Shown first column.

3. Under **Entries-Shown in default order,** click to select one or more **reports(s)** that you want to change the order of, and then click the **Add** button.
4. Continue to click the following buttons to change the order of **folders** and **entries** as desired, and then click **OK**
   - Add
   - Remove
   - Add all
   - Remove all.

The following diagram shows the Order folders and entries screen.



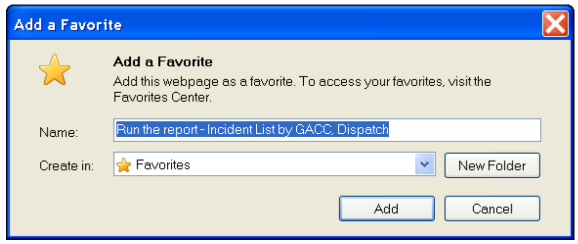
To bookmark a report (add to your Favorites in Internet Explorer)

1 Run the report of your choice.

2 On the **Cognos Viewer** toolbar, click the **Add this report** drop-down arrow, and then click **Add to My Bookmarks**.

3 On the **Add a Favorite** dialog box, type the **name of the bookmark**, as appropriate, and then click **Add**.

The following diagram shows the Add a Favorite dialog box.



Working with Standard reports

This section explains tasks specific to working with Standard reports that are available in ROSS. Topics include:

- Completing filter criteria for Standard reports
- Running Standard reports.

For more information about scheduling a Report View see, "Scheduling a Report View," later in this chapter.

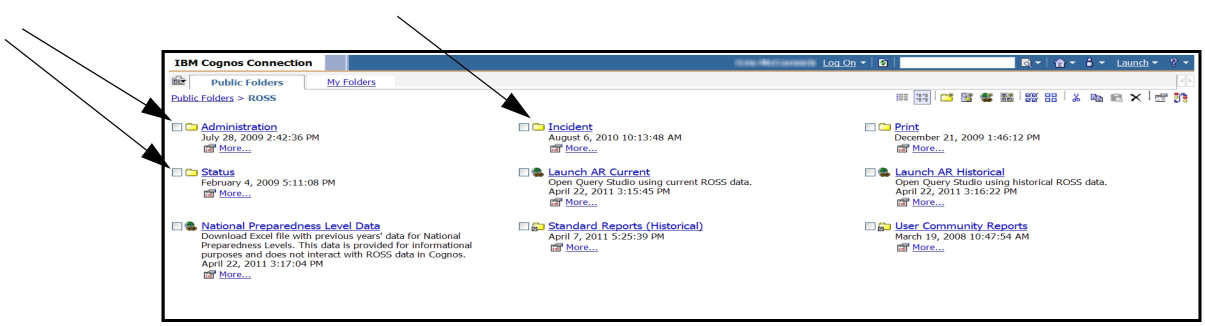
To access Standard reports

1 On the **Administration** menu, click **Reports**.

2 From the **IBM Cognos Connection** screen on the **Public Folders** tab, click to select one of the following **folders** of your choice

- Administration
- Incident
- Status.

The following diagram shows the IBM Cognos Connection screen. The arrows point to the Administration, Incident, and Status folders.



Completing filter criteria for Standard reports

A filter criteria screen displays when you run a report. This screen is specific to the report and usually contains both required and optional fields from which you may select. A red dashed line identifies a required field that has yet to be selected.

To complete filter criteria for a Standard report

1. On the **filter criteria** screen that displays for the report of your choice, click **( )** to open the filter options.

   Filter options may already be opened for entry.

2. For each required field, click to select the **filter criteria** of your choice, and then click the **Filter** button.

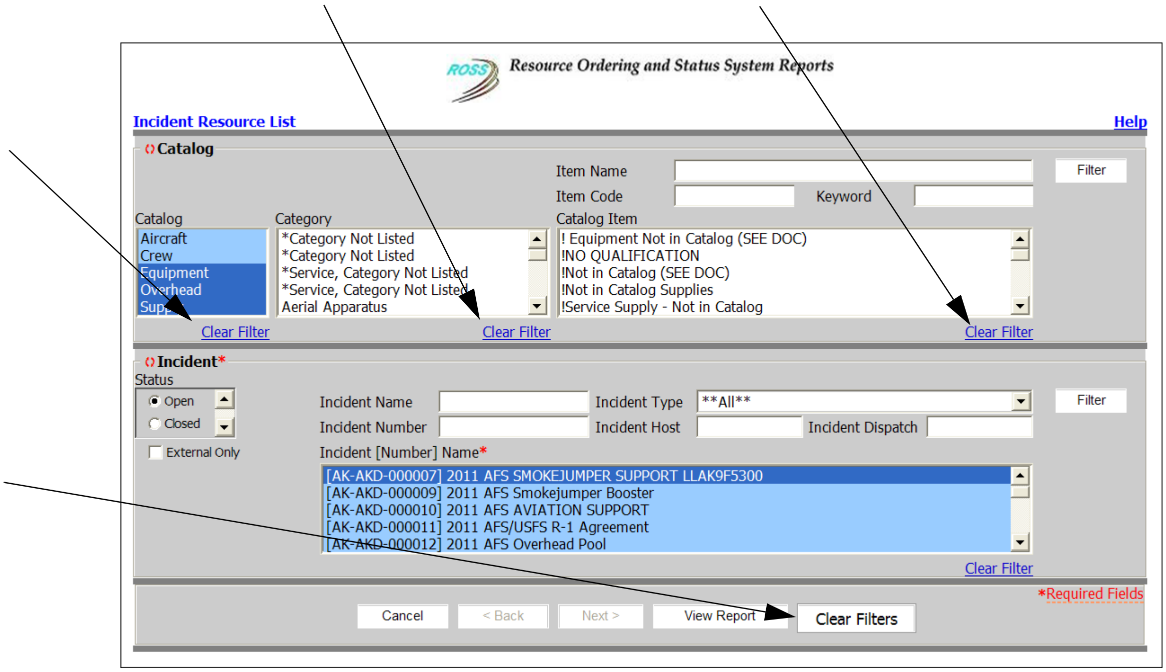
   The Filter button allows you to restrict (or filter) the ROSS data that will be accessed to run your report.

3. When finished selecting all required fields, click the **View Report** button.

To clear filter criteria

1. To clear all filters on the **filter criteria** screen, click the **Clear Filters** button on the **filter criteria** screen.
2. To clear individual filter criteria, click to select the **Clear Filter** option that corresponds to the filter criteria of your choice.

The following diagram shows a portion of the filter criteria screen for Incident Resource List. The arrows point to the Clear Filter options for Catalog filter criteria.



Running Standard reports

This section explains how to run a Standard report and save it as a Report View in My Folders in Cognos. This section also explains how to change the format of the report

For more information about scheduling a Report View see, Scheduling a Report View," later in this chapter.

To run a Standard Report and save it as a Report View

1 On the **Administration** menu, click **Reports**.

2 From the **IBM Cognos Connection** screen on the **Public Folders** tab, click to select one of the following **folders** of your choice

- Administration
- Incident
- Status.

3 On the **filter criteria** screen that displays for the report of your choice, click **( )** to open the filter options.

Filter options may already be opened for entry.

Filter

4 For each required field, click to select the **filter criteria** of your choice, and then click the **Filter** button.

The Filter button allows you to restrict (or filter) the ROSS data that will be accessed to run your report.

View Report

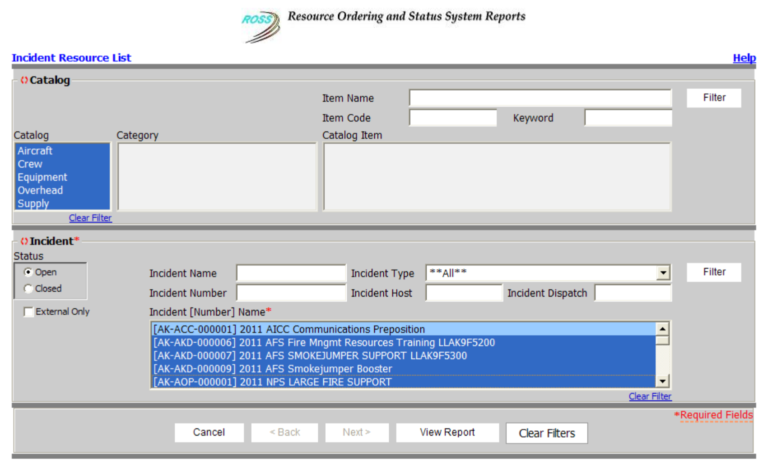
5 When finished selecting all required fields, click the **View Report** button.

6 Click the **Keep this version** drop-down arrow, and then click to select **Save as Report View**.

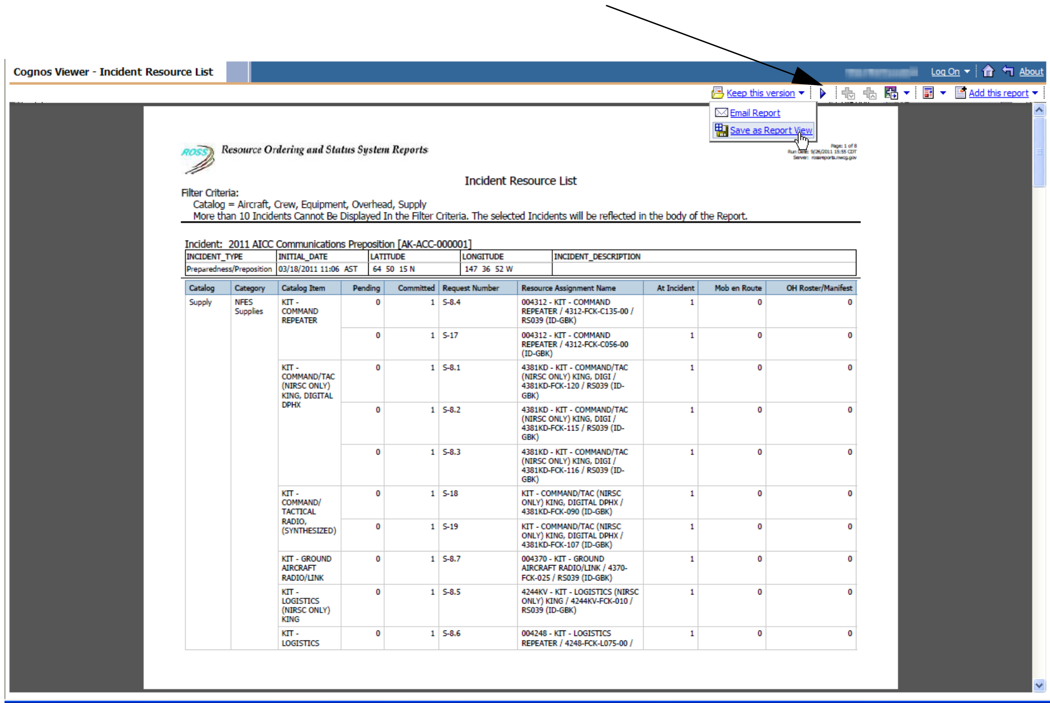
7 On the **Save as report view** screen, type the **name of the report** in the **Name** text box.

8 Under **Location**, verify or click to select **My Folders**, and then click **OK**.

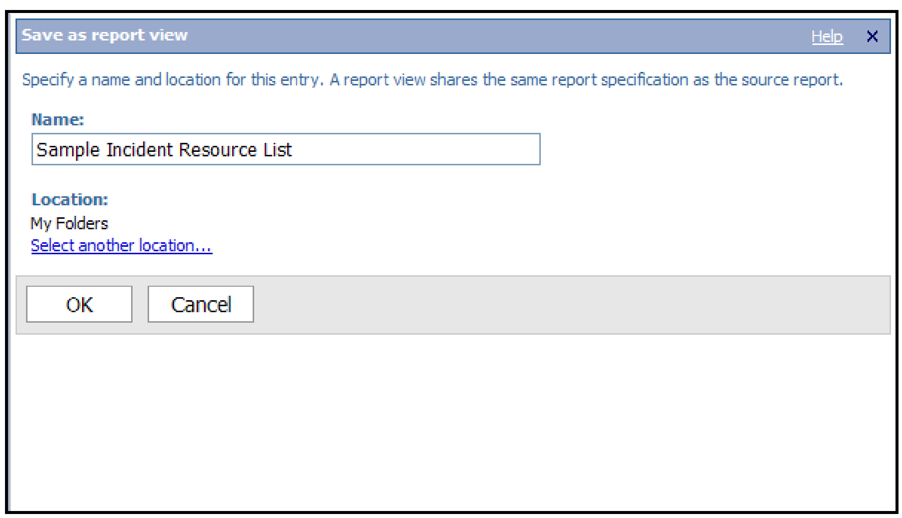
The following diagram shows a sample filter criteria screen for an Incident Resource List report. The arrow points to the Incident () option and identifies the required filter criteria. You must click to open and then complete all required filter criteria to run the report.



The following diagram shows the resulting Incident Report List report. The arrow points to the Keep this version drop-down arrow.



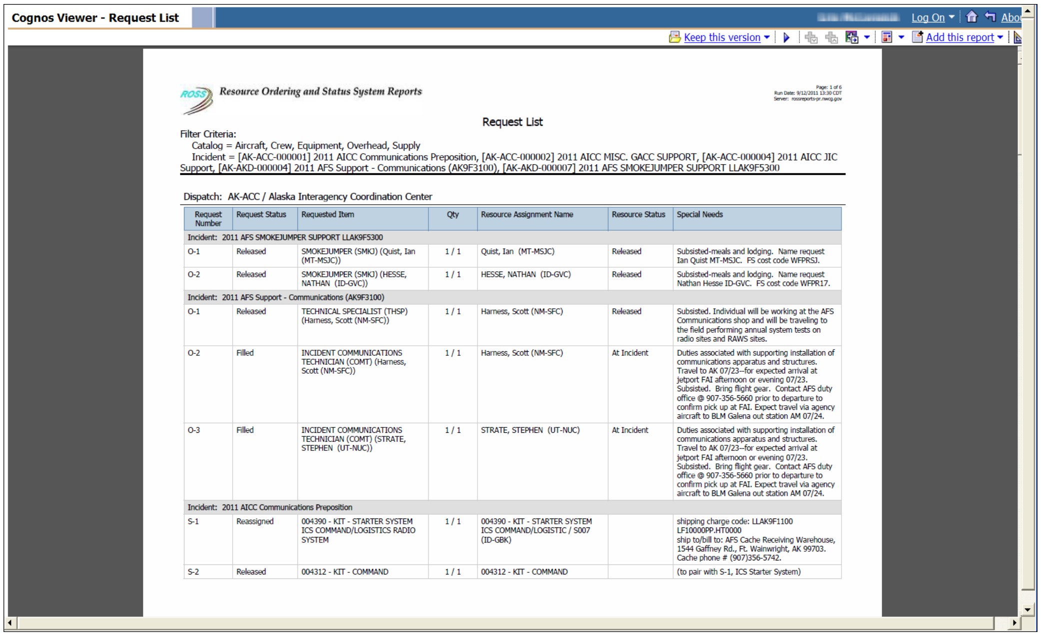
The following diagram shows a sample Save as report view screen for a Standard report.



To run a Standard report saved in My Folders

- On the **My Folders** tab, click the **report name** of your choice.

The following diagram shows a sample report displayed on the Cognos Viewer.



To change filter criteria for a Standard report saved as a Report View in My Folders in Cognos

1. On the **My Folders** tab, click the **Run with options** button that corresponds to the **report name** of your choice.
2. On the **Run with options** screen, click to select the **Prompt for values** check box.

   The Prompt with values check box may already be selected.

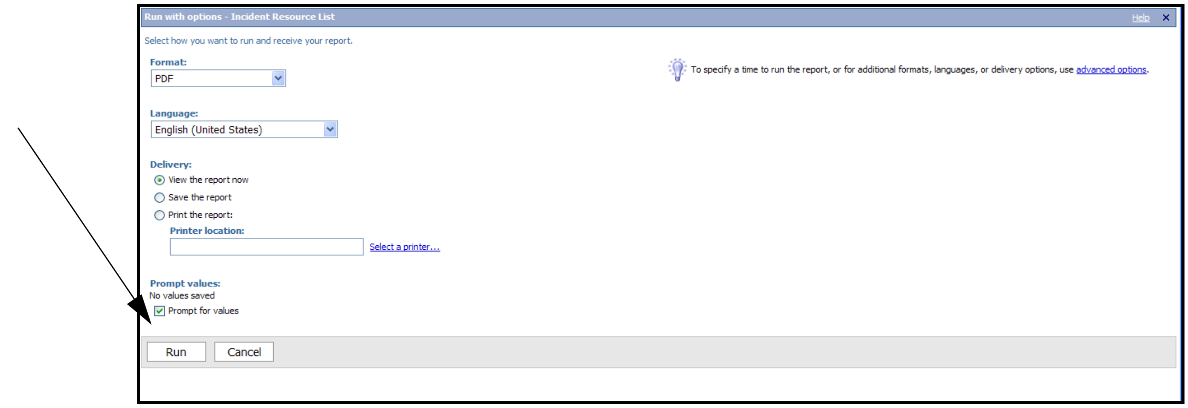
3. On the **filter criteria** screen that displays for the report of your choice, click **( )** to open the filter options.

   Filter options may already be opened for entry.

4. For each required field, click to select the **filter criteria** of your choice, and then click the **Filter** button.

5. When finished selecting all required fields, click the **View Report** button.

The following diagram shows the Run with options screen. The arrow points to the Prompt for values check box.



Working with User Community reports

This section explains tasks specific to running User Community reports that are available in ROSS. Topics include:

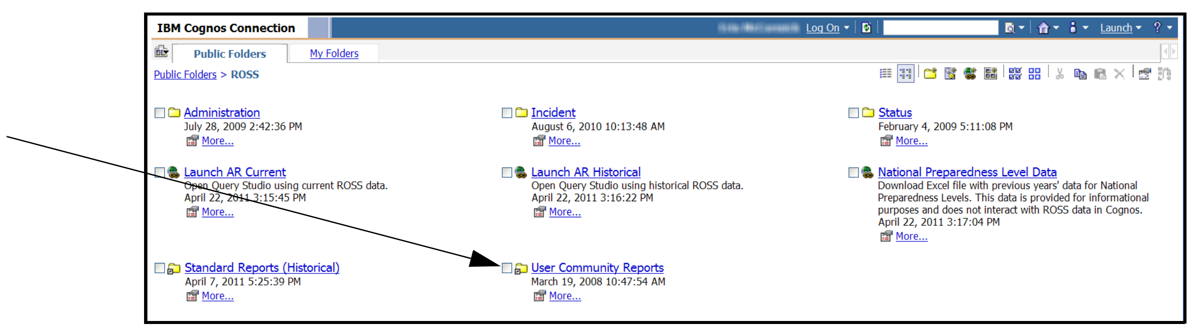
- Entering prompt values and running a User Community report
- Saving the Report View to My Folders in Cognos.

For more information about scheduling a Report View see, Scheduling a Report View,” later in this chapter.

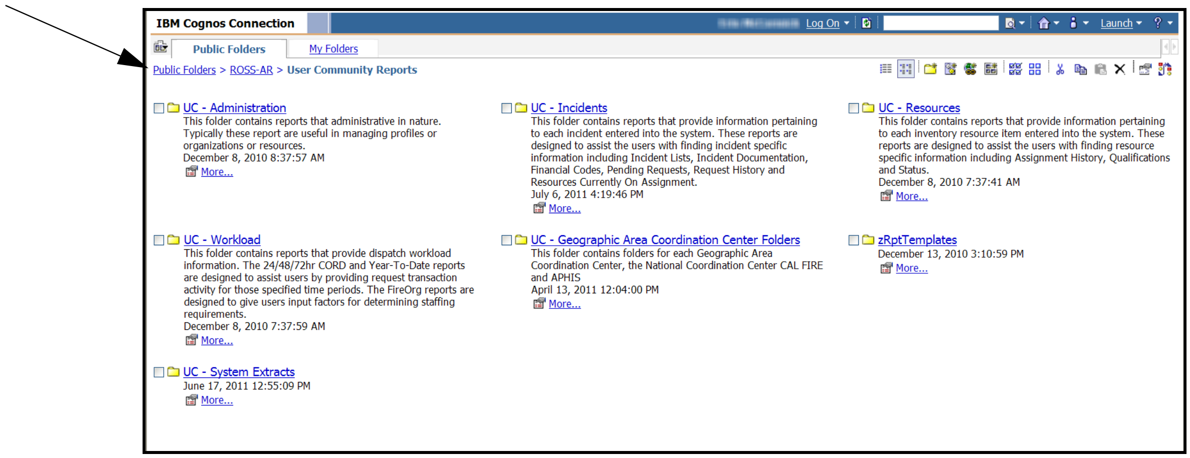
To access User Community Reports

1. On the **Administration** menu, click **Reports**.
2. From the **IBM Cognos Connection** screen on the **Public Folders** tab, click to select the **User Community Reports** folder.

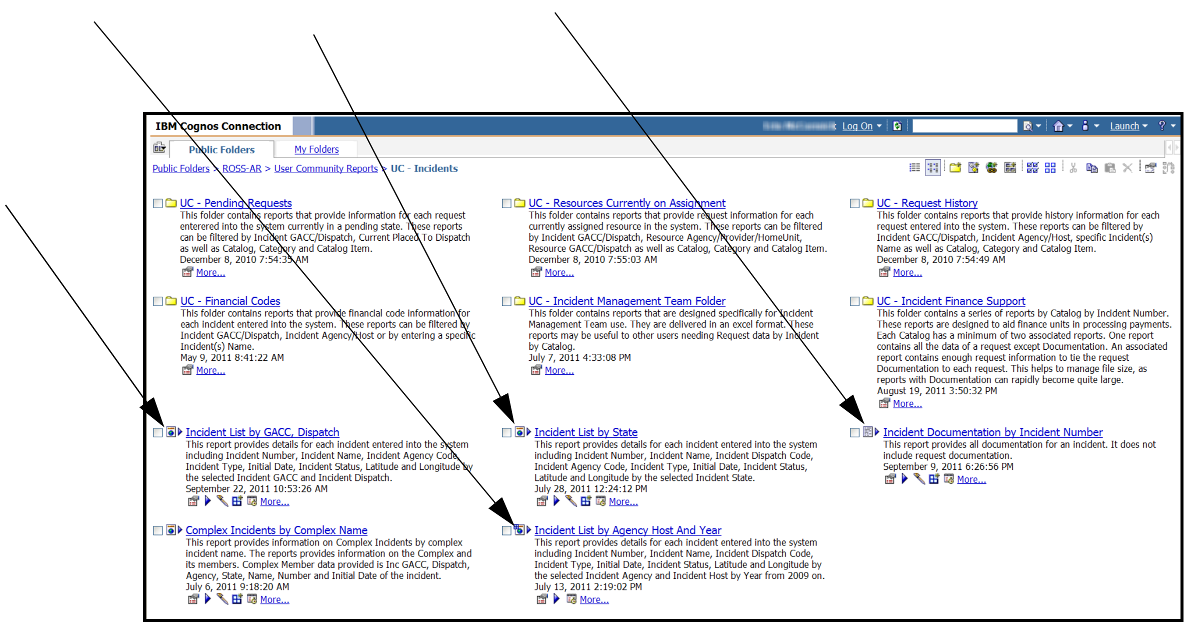
The following diagram shows the Public Folders tab, Details View, in Cognos. The arrow points to User Community reports.



The following diagram shows the User Community Reports screen. The arrow points to the location of these reports in Cognos.



The following diagram shows the reports available from the UC - Incidents folder. The arrows highlight the HTML icons next to each report name, which tells you that the default format for running that User Community Report is HTML.



Entering prompt values and running a User Community report

This section explains how to enter prompt values for a sample User Community report and run the report using current data.

The default format for User Community reports is HTML.

To enter prompt values for a User Community report

Required values display a red asterisk (*) next to its name.

1 On the **Prompt** screen that displays for your User Community report**,** click to select the **first set of values** in the **Provide a value** list box, and then click the **Reprompt** button.

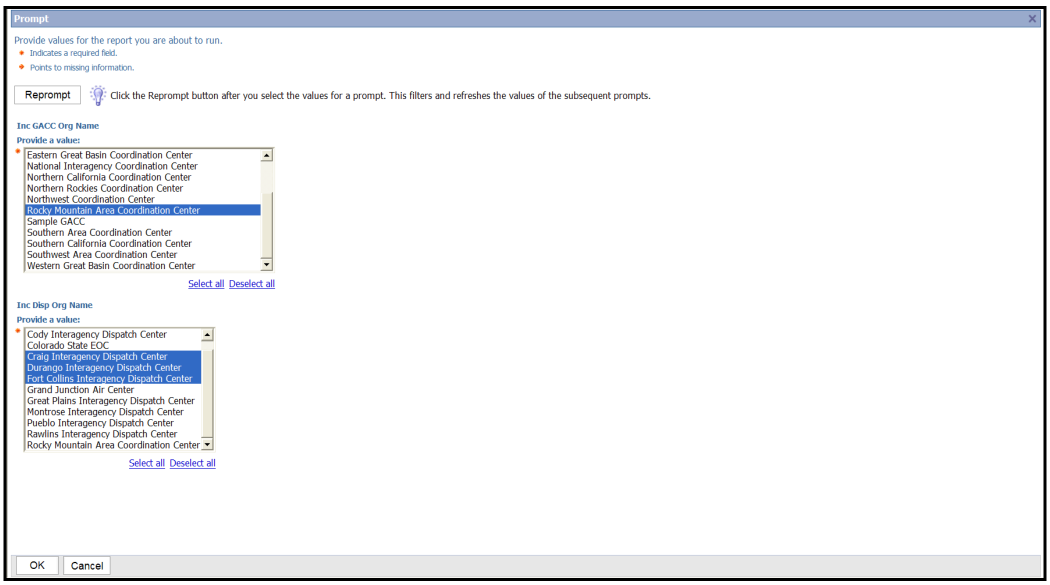
To select more than one value at a time, click and hold [CTRL], and then click to select the values of your choice.

Reprompt

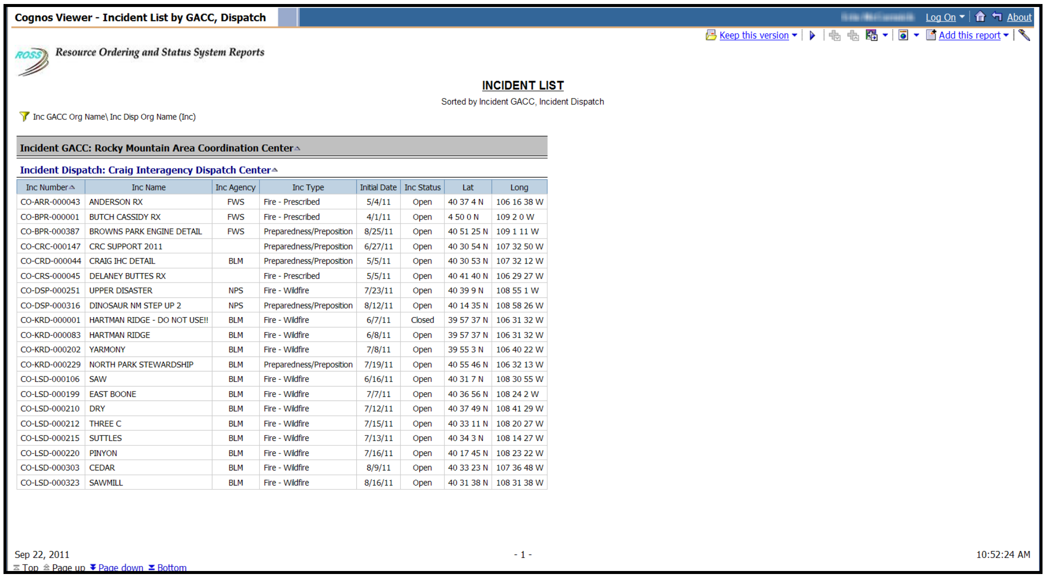
2 Click to select the next set of values, clicking the **Reprompt** button after each selection.

3 When finished, click **OK**.

The following diagram shows a sample, completed Prompt screen for the Incident List by GACC and Dispatch.

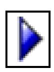


The following diagram shows the resulting Incident List by GACC and Dispatch report, based on these prompt values.



Inc Number	Inc Name	Inc Agency	Inc Type	Initial Date	Inc Status	Lat	Long
CO-ARR-000043	ANDERSON RX	FWS	Fire - Prescribed	5/4/11	Open	40 37 4 N	106 16 38 W
CO-BPR-000001	BUTCH CASSIDY RX	FWS	Fire - Prescribed	4/1/11	Open	4 50 0 N	109 2 0 W
CO-BPR-000387	BROWNS PARK ENGINE DETAIL	FWS	Preparedness/Preposition	8/25/11	Open	40 51 25 N	109 1 11 W
CO-CRC-000147	CRC SUPPORT 2011		Preparedness/Preposition	6/27/11	Open	40 30 54 N	107 32 50 W
CO-CRD-000044	CRAIG IHC DETAIL	BLM	Preparedness/Preposition	5/5/11	Open	40 30 53 N	107 32 12 W
CO-CRS-000045	DELANEY BUTTES RX		Fire - Prescribed	5/5/11	Open	40 41 40 N	106 29 27 W
CO-DSP-000251	UPPER DISASTER	NPS	Fire - Wildfire	7/23/11	Open	40 39 9 N	108 55 1 W
CO-DSP-000316	DINOSAUR NM STEP UP 2	NPS	Preparedness/Preposition	8/12/11	Open	40 14 35 N	108 58 26 W
CO-KRD-000001	HARTMAN RIDGE - DO NOT USE!!	BLM	Fire - Wildfire	6/7/11	Closed	39 57 37 N	106 31 32 W
CO-KRD-000083	HARTMAN RIDGE	BLM	Fire - Wildfire	6/8/11	Open	39 57 37 N	106 31 32 W
CO-KRD-000202	YARMONY	BLM	Fire - Wildfire	7/8/11	Open	39 55 3 N	106 40 22 W
CO-KRD-000229	NORTH PARK STEWARDSHIP	BLM	Preparedness/Preposition	7/19/11	Open	40 55 46 N	106 32 13 W
CO-LSD-000106	SAW	BLM	Fire - Wildfire	6/16/11	Open	40 31 7 N	108 30 55 W
CO-LSD-000199	EAST BOONE	BLM	Fire - Wildfire	7/7/11	Open	40 36 56 N	108 24 2 W
CO-LSD-000210	DRY	BLM	Fire - Wildfire	7/12/11	Open	40 37 49 N	108 41 29 W
CO-LSD-000212	THREE C	BLM	Fire - Wildfire	7/15/11	Open	40 33 11 N	108 20 27 W
CO-LSD-000215	SUTTLES	BLM	Fire - Wildfire	7/13/11	Open	40 34 3 N	108 14 27 W
CO-LSD-000220	PINYON	BLM	Fire - Wildfire	7/16/11	Open	40 17 45 N	108 23 22 W
CO-LSD-000303	CEDAR	BLM	Fire - Wildfire	8/9/11	Open	40 33 23 N	107 36 48 W
CO-LSD-000323	SAWMILL	BLM	Fire - Wildfire	8/16/11	Open	40 31 38 N	108 31 38 W

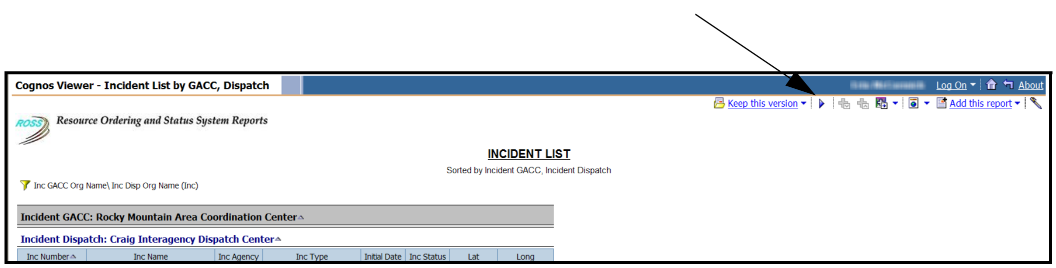
To change prompt values for your report



1 While viewing the User Community report of your choice, click the **Run** button **o**n the **Cognos Viewer** toolbar.

2 Complete the required **prompt values** as appropriate, and then click **OK**.

The following diagram shows the Cognos Viewer toolbar. The arrow points to location of the Run button.



Saving a User Community Report View to My Folders in Cognos

Once you complete all required prompt values, you can save the Report View to My Folders in Cognos and run it as needed to obtain the most current data.

To save a User Community report as a Report View to My Folders in Cognos

1 Click to select the **User Community report** of your choice.

2 Complete the required **prompt values**, and then click **OK**.

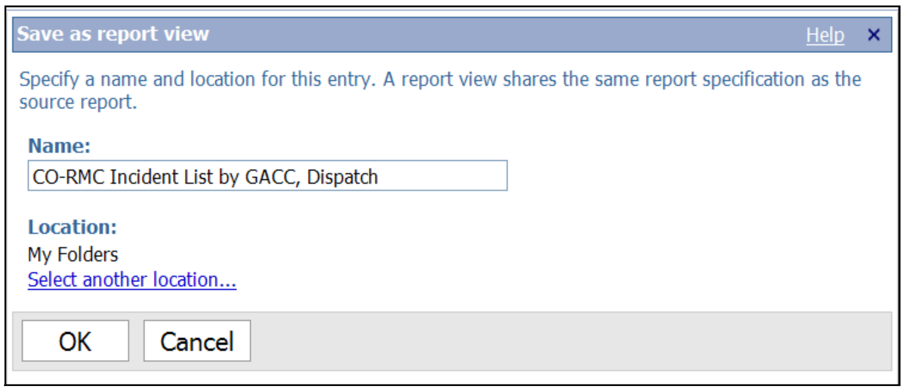
3 Click the **Keep this version** drop-down arrow, and then click to select **Save as Report View**.

4 On the **Save as report view** screen, type the **name of the report** in the **Name** text box.

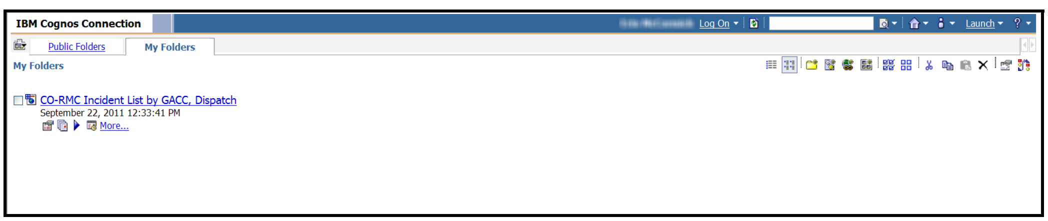
5 Under **Location**, verify or click to select **My Folders**, and then click **OK**.

6 To view the saved **Report View**, click the **Home** button, and then click the **My Folders** tab.

The following diagram shows the Save as report view screen for an Incident List by GACC and Dispatch report. The arrow points to My Folders.



The following diagram shows the resulting Report View saved in My Folders.



To run a Report View from My Folders in Cognos

1 On the **IBM Cognos Connection** toolbar, click the **My Folders** tab.

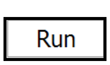
2 On the **My Folders** tab, click the **Run with options** button for that **Report View**.

3 On the **Run with options** screen, click the **Format** drop-down arrow, and then click to select the **report format** of your choice.

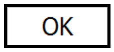
To accept the default format (HTML) for the User Community report, you may skip this step!

4 Under **Delivery**, click to select **View the report now**.

5 If not already selected, click to select the **Prompt for values** check box.



6 Click the **Run** button.



7 On the **Prompt** screen, click to select the report values of your choice, and then click **OK**.

8 Click to select all **required values** for each list box, clicking the **Reprompt** button after each selection.

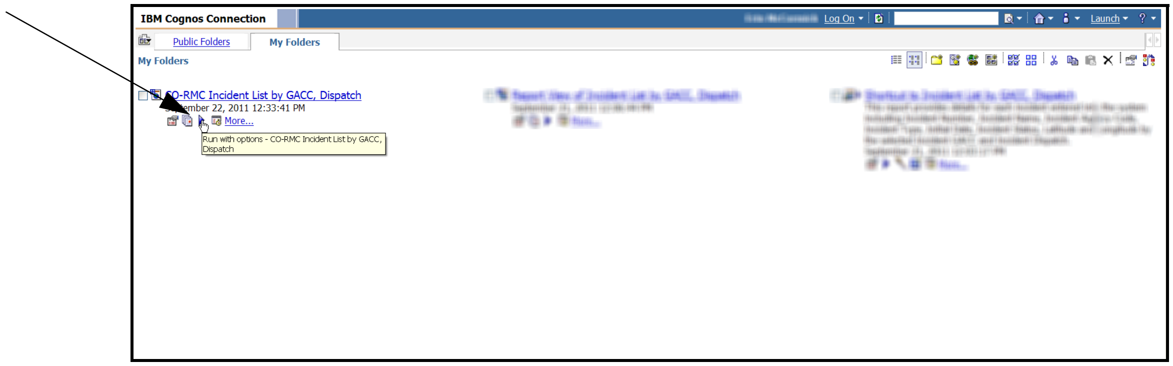
Required values display a red asterisk (*) next to its name.

9 When finished selecting all required values, click **OK**.

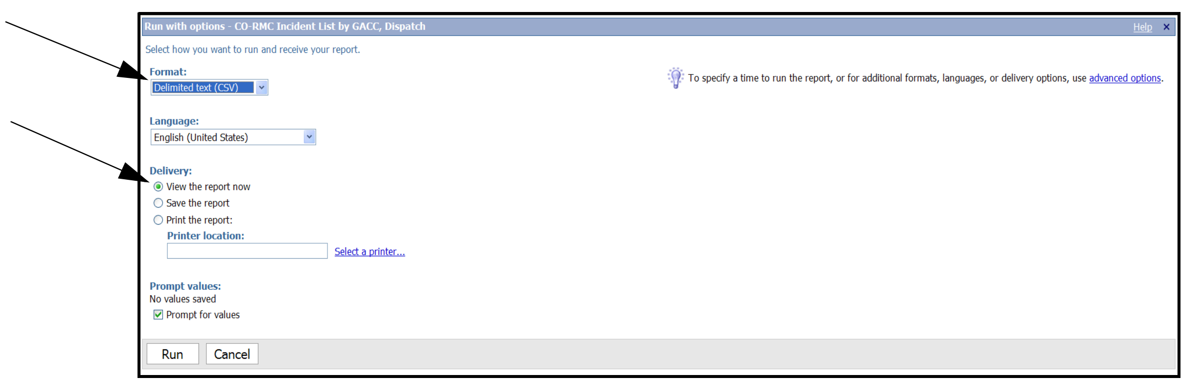
10 On the **File Download** dialog box, click **Save**.

11 On the **Save As** dialog box, complete the **File Name**, and then save the report to your personal computer in the location of your choice.

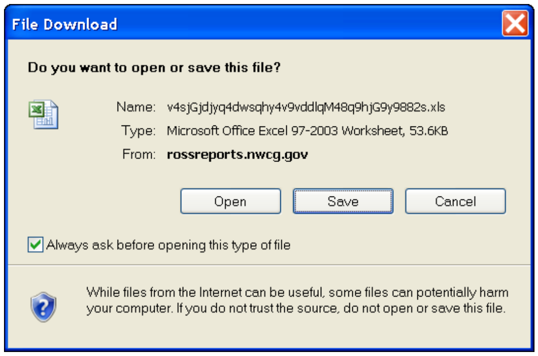
The following diagram shows a sample My Folders. The arrow points to the Run with options button for the Report View of CO-RMC Incident List by GACC, Dispatch.



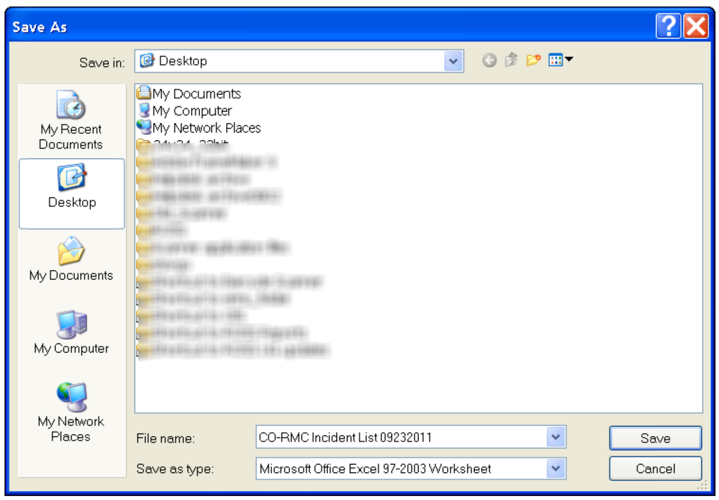
The following diagram shows the Run with options screen. The arrows point to the Format drop-down arrow and then View the report now option. In this example, the report will be generated in Delimited text (CSV) format.



The following diagram shows the resulting File Download dialog box for saving the generated report as Delimited text (CSV).



The following diagram shows a sample Save As dialog box for saving a CSV file to your desktop.



Scheduling a Report View

This section explains how to schedule a Report View from My Folders. Whether the Report View is a Standard report or a User Community report, scheduling a Report View is performed in the same way. You have the following options for scheduling a Report View:

- By Day
- By Week
- By Month
- By Year
- By Trigger.

Before scheduling your reports determine how often you realistically need the report to run. Remember that scheduling a report to run too frequently ties up the system, which impacts all others trying to run their reports.

Running the report as you need it may be more appropriate if you need the report frequently throughout the day.

To schedule a single report to run on a regular basis

1 Run the **User Community report** of your choice, and then save it to **My Folders in Cognos**.

2 Click the **My Folders** tab, and then click the **Schedule** button that corresponds to the **report** of your choice.

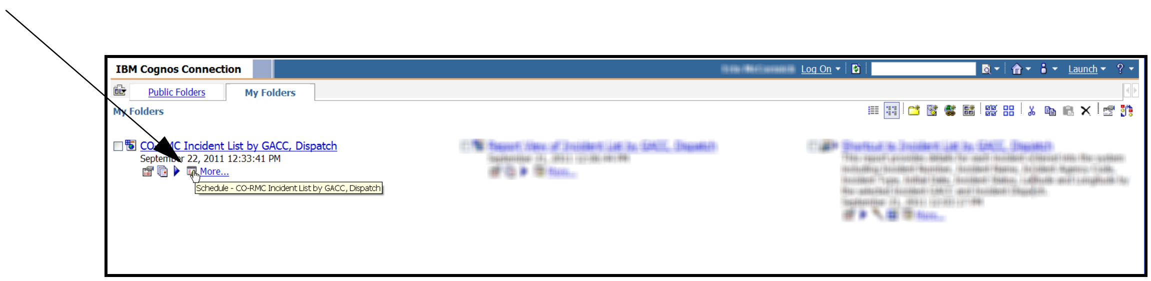
3 On the **Schedule** screen, click to select the **Frequency tab** of your choice.

4 Under **Prompt values**, click to select the **Override default values** check box, and then click the **Set** link.

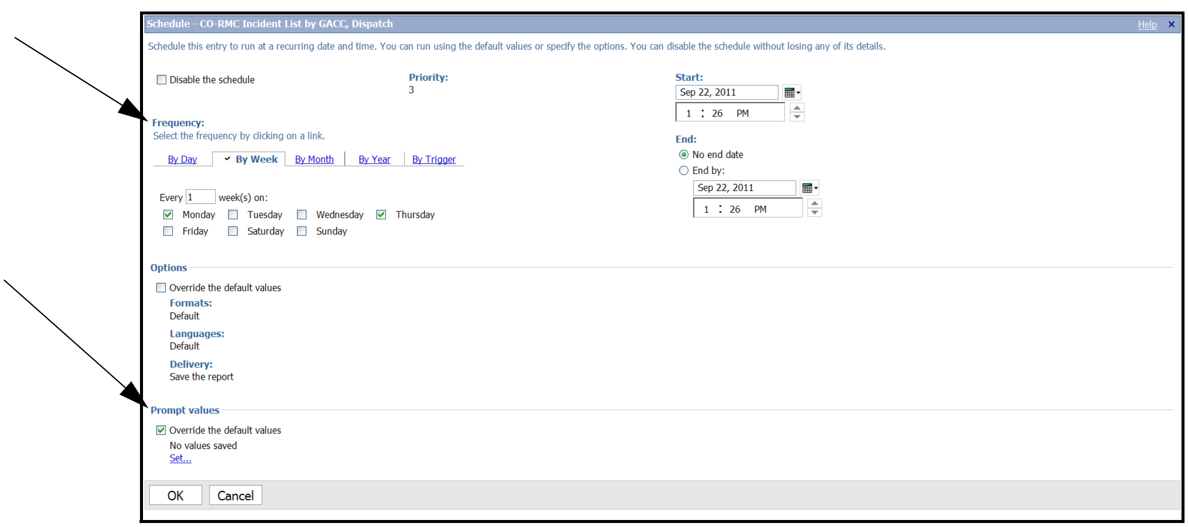
5 On the **Prompt** screen, complete the **value(s)** for the report of your choice, and then click **OK**.

6 On the **Schedule** screen that displays for the **Frequency** tab you selected, complete the information as appropriate, and then click **OK**.

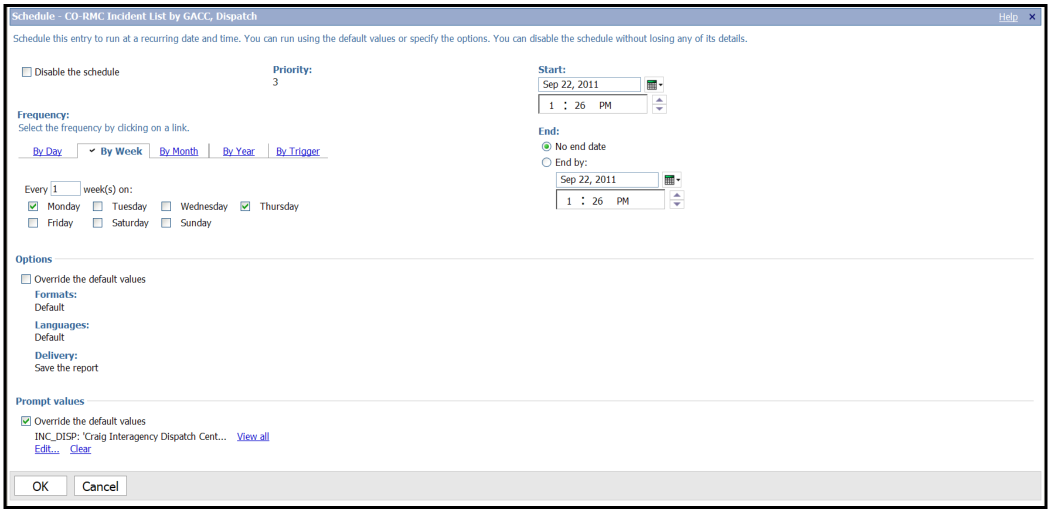
The following diagram shows a sample My Folders. The arrow points to the Schedule button for the Report View of CO-RMC Incident List by GACC, Dispatch.



The following diagram shows a sample Schedule screen. The arrows point to Frequency and Prompt values. In this example, the report is being scheduled every Monday.



The following diagram shows the resulting Schedule screen.



To edit a schedule

1 On the **My Folders** tab, click the **Schedule** link that corresponds to the **report** of your choice.

2 On the **Schedule** screen, change the information as appropriate for that screen and your needs, and then click **OK**.

To disable a schedule

1 On the **My Folders** tab, click the **Schedule** link that corresponds to the **report** of your choice.

2 On the **Schedule** screen, click to select the **Disable the schedule** check box, and then click **OK**.

To schedule multiple reports to run on a regular basis

Saved schedules appear on your My Folders tab.

1 On the **IBM Cognos Connection**, click the **New job** button.

2 On the **New job wizard** screen, complete the following information

- Name
- Description
- Screen tip.

3 Click the **Select My Folders** link, and then click the **Next** button.

4 On the **New job wizard** screen, click the **Add** link.

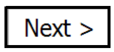
5 On the **New job wizard** screen, click to select the **check boxes** that correspond to the **reports** you want to schedule, and then click the **Add** arrow button.

6 If appropriate, navigate to the **Public Folders** and add all the reports you want to schedule.

For more information about navigating to the ROSS Public Folders see the task, "To navigate to a different folder," in this section.

7 When finished adding all the reports you want to schedule, click **OK**.

8 On the **New job wizard** screen, click to select the **check boxes** that correspond to the **reports** you want to schedule, set the **options and prompt values** for each report as appropriate.



9 Under **Submission of steps**, click to select the **option** of your choice, and then click the **Next** button.

10 On the **Select an action - job** screen, click to select **Save and schedule**, and then click the **Finish** button.

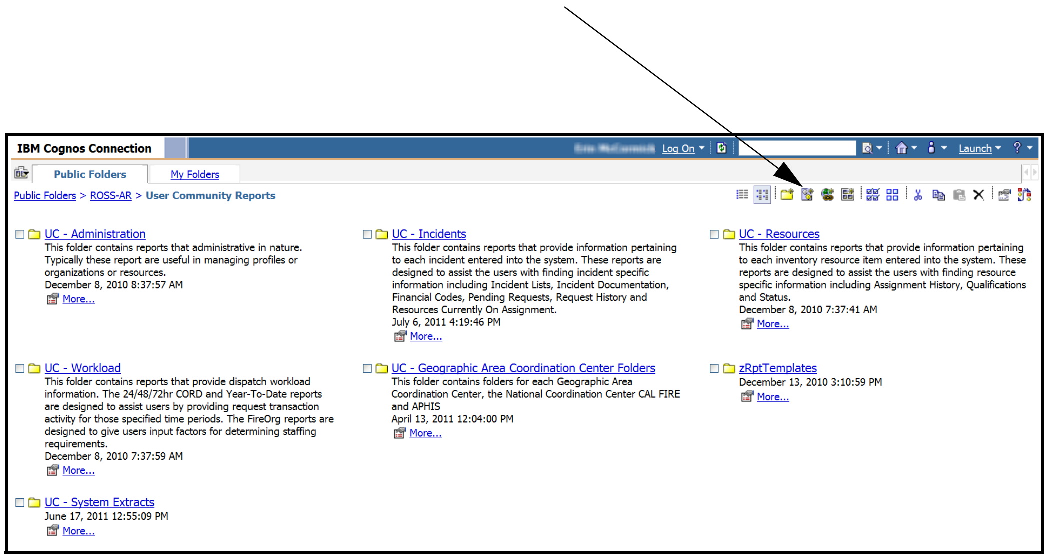
11 On the **Schedule** screen, click to select one of the following tabs

- By Day
- By Week
- By Month
- By Year.

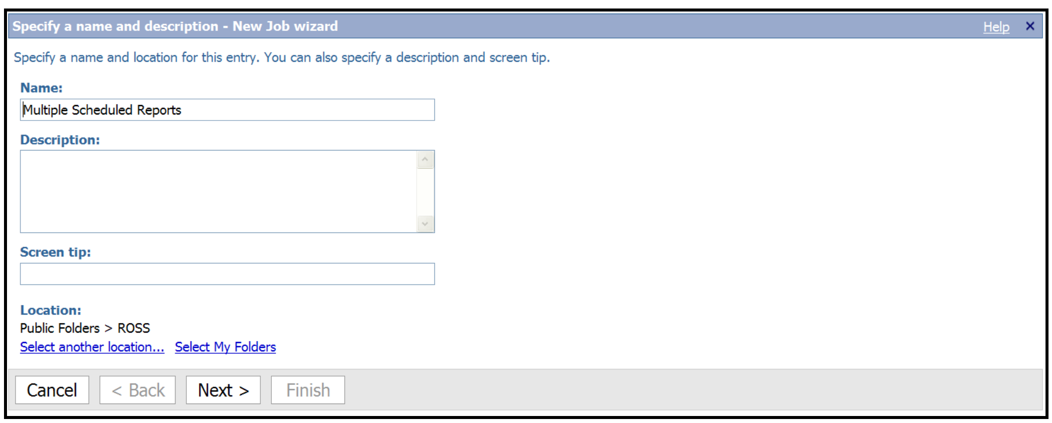
12 On the **Schedule** screen that displays for the tab you selected, complete the information as appropriate for that screen and your needs, and then click **OK**.

For complete information about completing the Schedule screen see the next tasks, "To schedule daily reports," "To schedule weekly reports," "To schedule monthly reports," and "To schedule yearly reports," in this chapter.

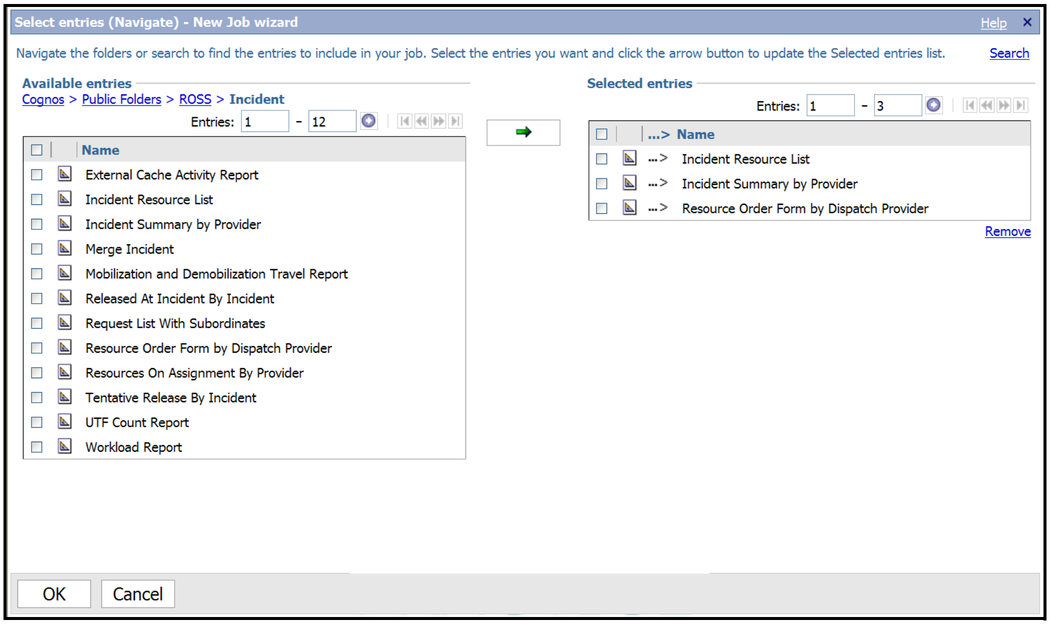
The following diagram shows a sample My Folders screen. The arrow points to the New Job button.



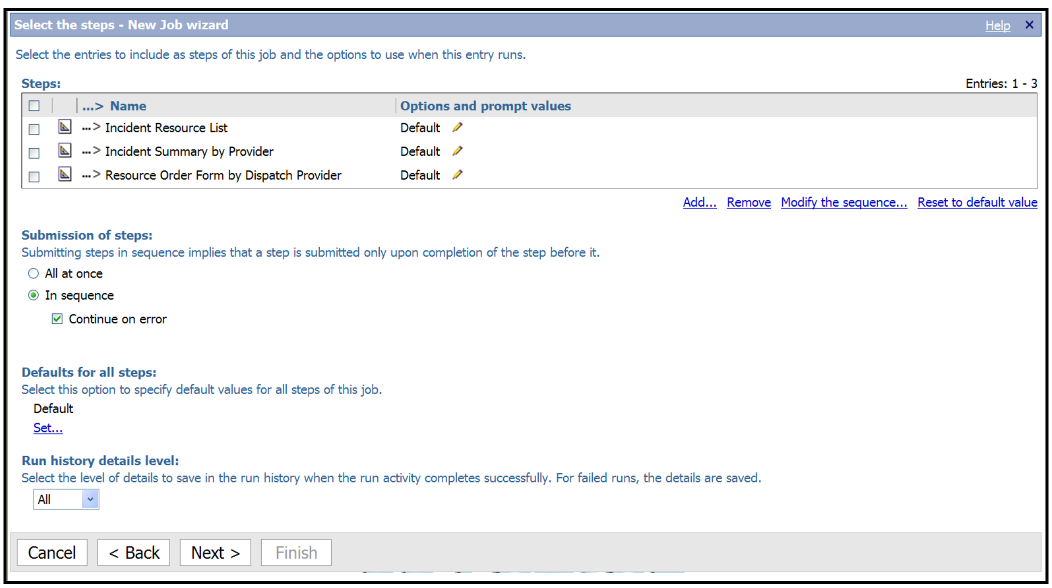
The following diagram shows the New job wizard screen for naming the reports in your schedule.



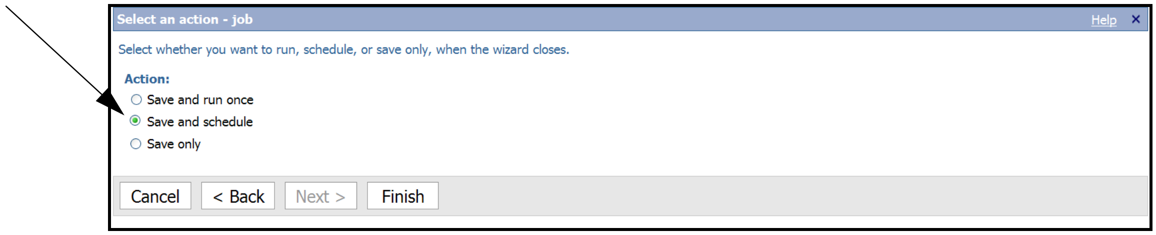
The following diagram shows a sample New job wizard screen showing a list of reports to be scheduled. In this example, reports being scheduled are from the Public Folders/ROSS/Incident folder.



The following diagram shows the Select the steps screen.



The following diagram shows the Select an action - job screen. The arrow points to the Save and schedule option.



The following diagram shows a sample Run with options - Multiple Scheduled Reports screen.

To email a scheduled report

1 On the **My Folders** tab, click the **Run with options** button that corresponds to the **report** of your choice, and then click the **advanced options** link.

2 On the **Run with advanced options** screen under **Delivery**, click to select the **Send a link to the report by email** check box, and then click to select the **Edit the options** link.

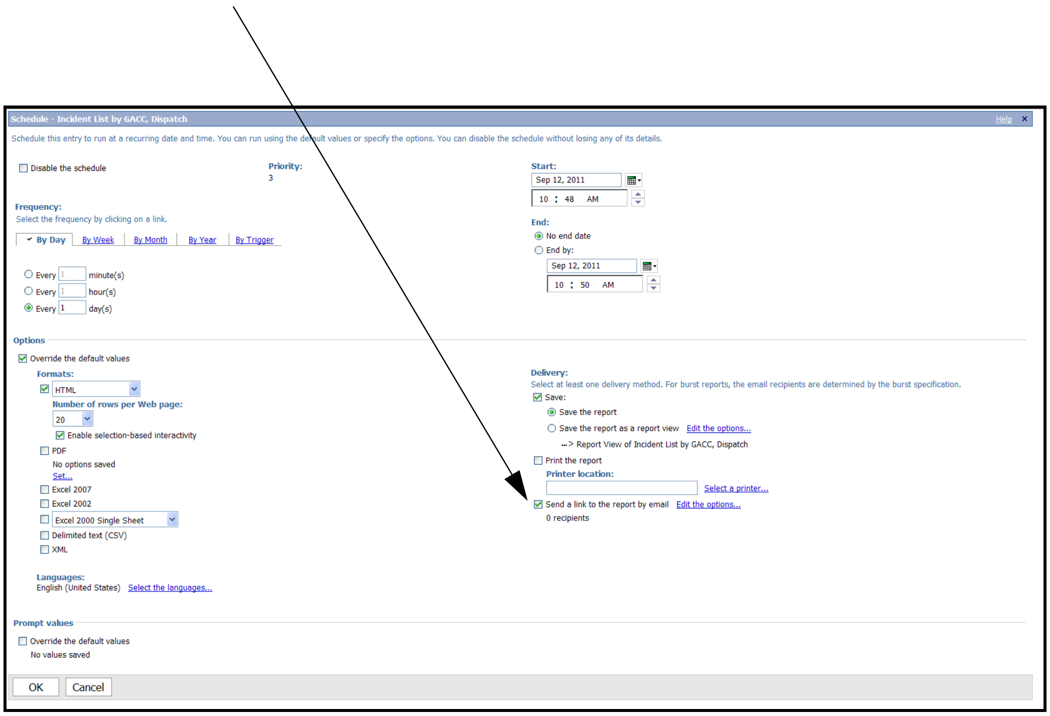
3 On the **Set the email options** screen, complete the following information as appropriate and then click **OK**

- To
- Cc
- Subject
- Body.

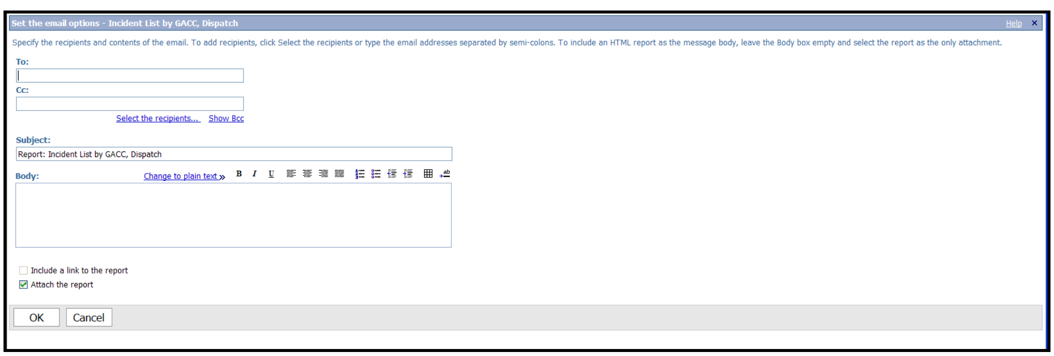
Separate email addresses using a semi-colon and no spaces. Use the sample format: name1@service provider1.com;name2@service provider2.gov; and so on.

4 On the **Run with advanced options** screen, complete the remaining information as appropriate, and then click the **Run** button.

The following diagram shows the Run with advanced options screen. The arrow points to the Send a link to the report by email check box.



The following diagram shows a sample Set the email options screen.



Due to restricted access to Cognos folders and to secure network connections, the Include a link to the report check box is disabled.

To email scheduled multiple reports

To print multiple reports that are scheduled, you must first save it to your personal computer.

1 On the **My Folders** tab, click the **Set properties** button that corresponds to the **scheduled group of reports** of your choice.

2 On the **Set properties** screen, click the **Job** tab.

3 On the **Job** tab under **Default for all steps**, click to select the **Set** link.

4 On the **Select default options** screen, click to select the **Report options** link, and then click to select the **Specify default values for all the reports of this job** check box.

5 Under **Delivery**, click to select the **Save the report, print it, or send an email** option, click to select the **Send the report by email** check box, and then click to select the **Edit the email options** link.

6 On the **Set the email options** screen, complete the following information as appropriate and then click **OK**

- To
- Cc
- Subject
- Body.

Separate email addresses using a semicolon and no spaces. Use the sample format: name1@service provider1.com;name2@service provider2.gov; and so on.

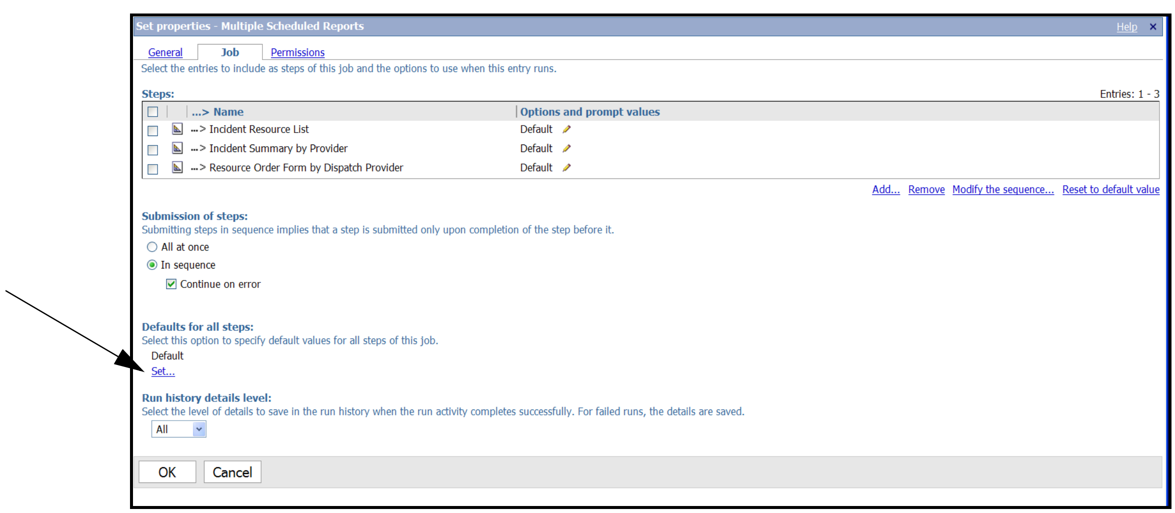
---

7 On the **Set the email options** screen, complete the following information as appropriate and then click **OK**

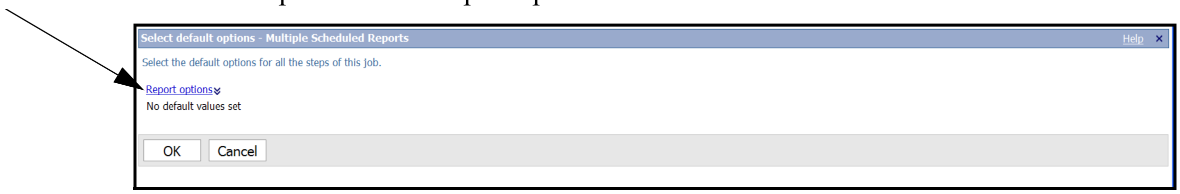
- To
- Cc
- Subject
- Body.

Separate email addresses using a semicolon and no spaces. Use the sample format: name1@service provider1.com;name2@service provider2.gov; and so on.

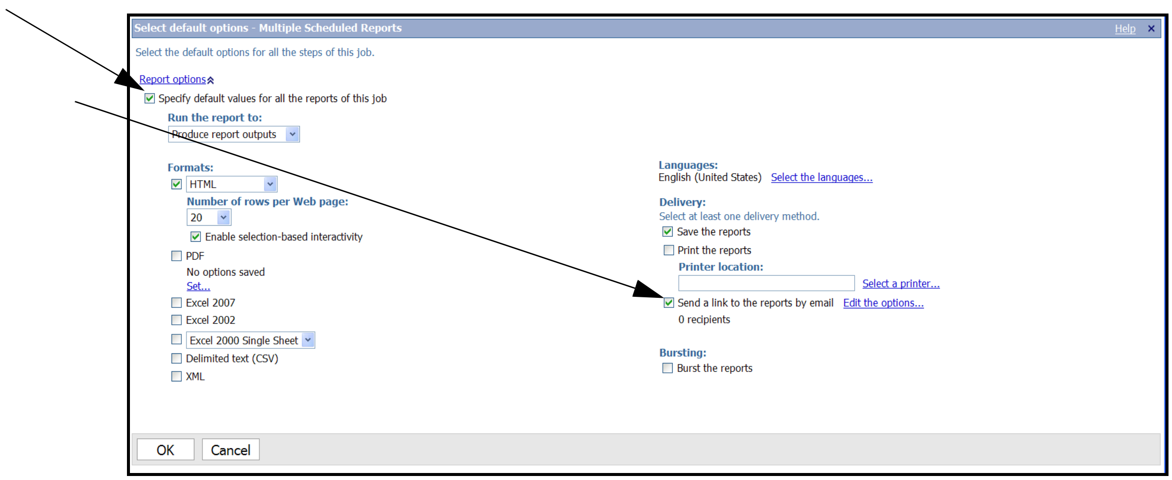
The following diagram shows the Set properties screen. The arrow points to the Set link on the Job tab.



The following diagram shows the Select default options screen. The arrow points to the Report options link.



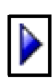
The following diagram shows the Select default options screen. The arrows point to the Specify default values for all the reports of this job check box and the Send the report by email check box.



To save a report in another format of your choice

You can change the format of Report View, which was previously saved in My Folders in Cognos, to run in another format.

1 Create a **Report View** of the **Standard** or **User Community report** of your choice and save it in **My Folders** in Cognos.

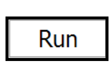


2 Click the **My Folders** tab, and then click the **Run with options** button for that **Report View**.

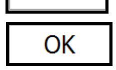
3 On the **Run with options** screen, click the **Format** drop-down arrow, and then click to select the **report format** of your choice.

4 Under **Delivery**, click to select **View the report now**.

5 If not already selected, click to select the **Prompt for values** check box.



6 Click the **Run** button.



7 On the **Prompt** screen, click to select the report values of your choice, and then click **OK**.

Saving a report to your personal computer

This section explains how to save a report and its snapshot of data in a format of your choice to your personal computer.

For more information about using Citrix to access ROSS and how to save that report to the Citrix farm or a network drive see, "Using Citrix to access ROSS," later in this chapter.

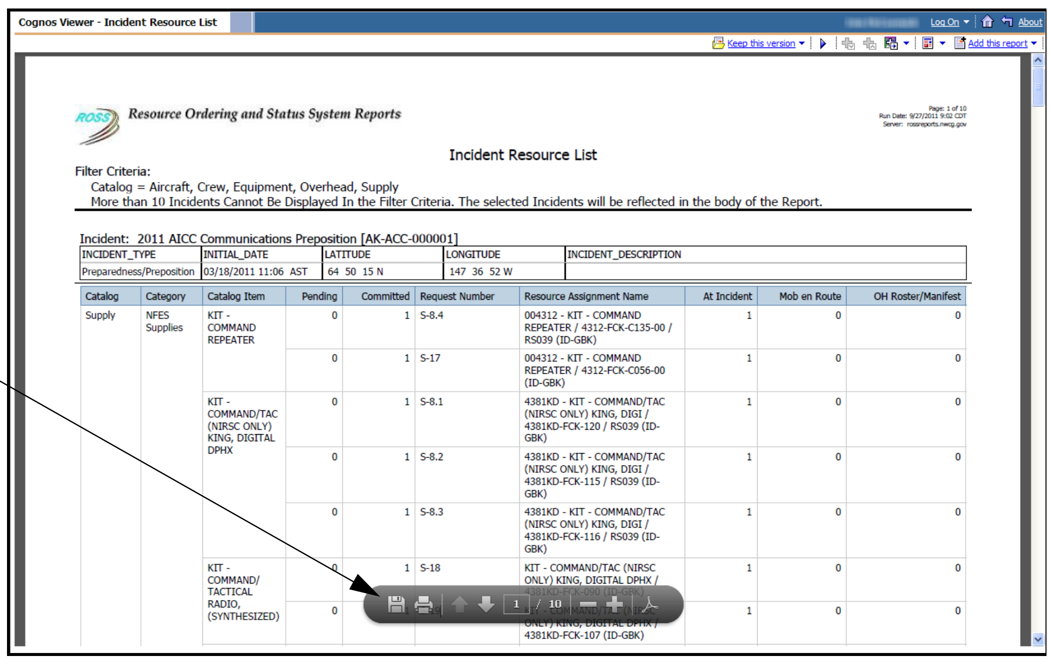
To save a report to your personal computer in PDF

1 Run the **Standard** or **User Community** report of your choice, in the format of your choice.

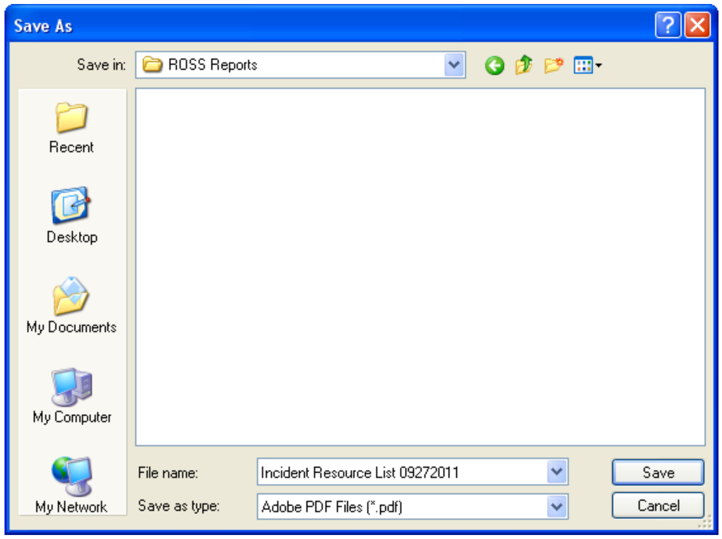
2 Click the **Save a copy** button.

3 On the **Save as** dialog box, name the file and save it to a location of your choice.

The following diagram shows a sample Incident List Report in PDF format. The arrow points to the location of the Save a copy button.



The following diagram shows a sample Save as dialog box.



Printing and emailing a report

Once you have the report saved in the format of your choice, you can use the appropriate application software to perform a wide variety of tasks, including the following:

- open the report
- print the report
- email the report.

To find out more about opening and printing reports saved to your personal computer, please refer to the application software user documentation for more information.

Using Citrix to access ROSS

This section explains tasks for using Citrix® to connect to and access ROSS from any Internet connection. From Citrix, you will notice that ROSS responds faster with quicker querying capabilities. Topics include:

- Getting started with Citrix
- Working with User Community reports when using Citrix.

Be sure to use the Internet address appropriate for your agency. If you are having trouble logging in for the first time see the task, “To manually install the Citrix plug-in onto your laptop or personal computer,” later in this section.

Getting started with Citrix

This section explains how to set up your personal computer so that you may effectively use Citrix and ROSS Reports.

To setup drive access for an individual ROSS user's computer

Perform this task before attempting to save ROSS reports to your desktop for the first time!

1 In **WordPad** or **NotePad**, type the following text

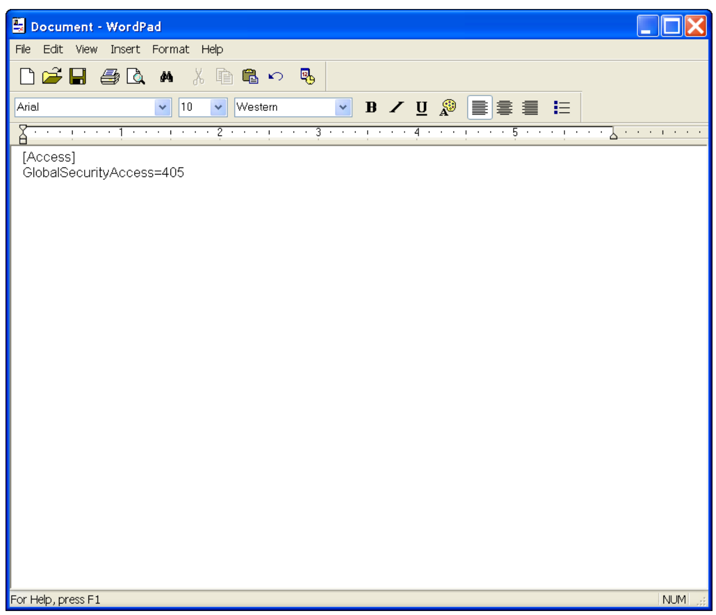
[Access]

GlobalSecurityAccess=405

2 Save the file as ASCII text in the following folder on your personal computer

C:\Documents and Settings\<username>\Application Data\ICAClient\webica.ini.

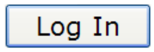
The following diagram shows a WordPad screen for the webica.ini file.



To log on to ROSS using Citrix - *for FS users only*

1 Start your Internet browser, and then type the following address in the **Address** bar:

https://apps.fs.fed.us/Citrix



2 On the E**nterprise Production Data Center at Kansas City (Citrix)** screen under **Login**, complete the following information, and then click the **Log In** button

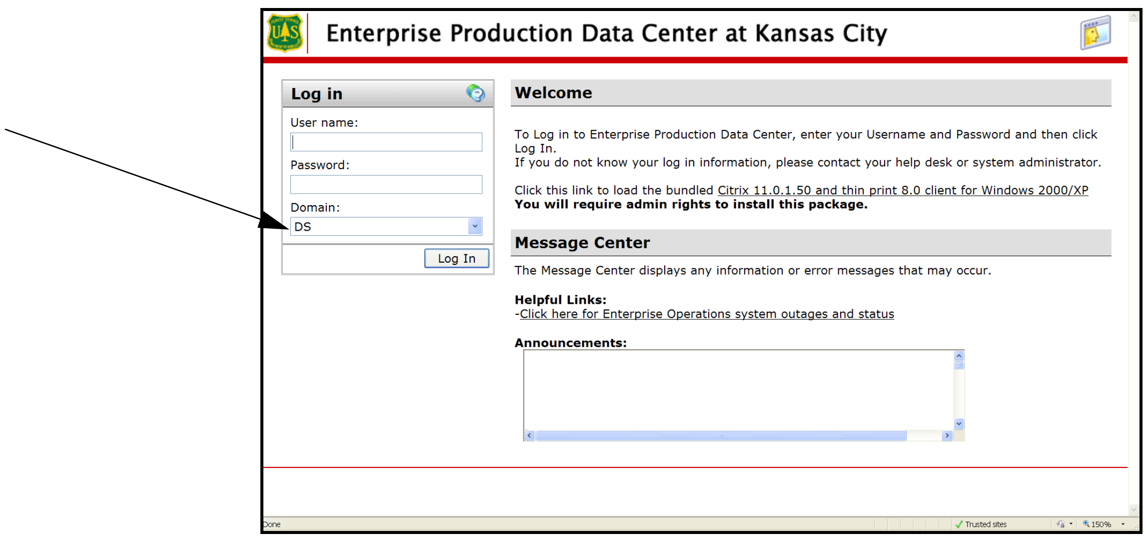
- Active Directory user name
- Active Directory password.

The Domain Name should read, "DS," on the Citrix Web Interface Login screen.

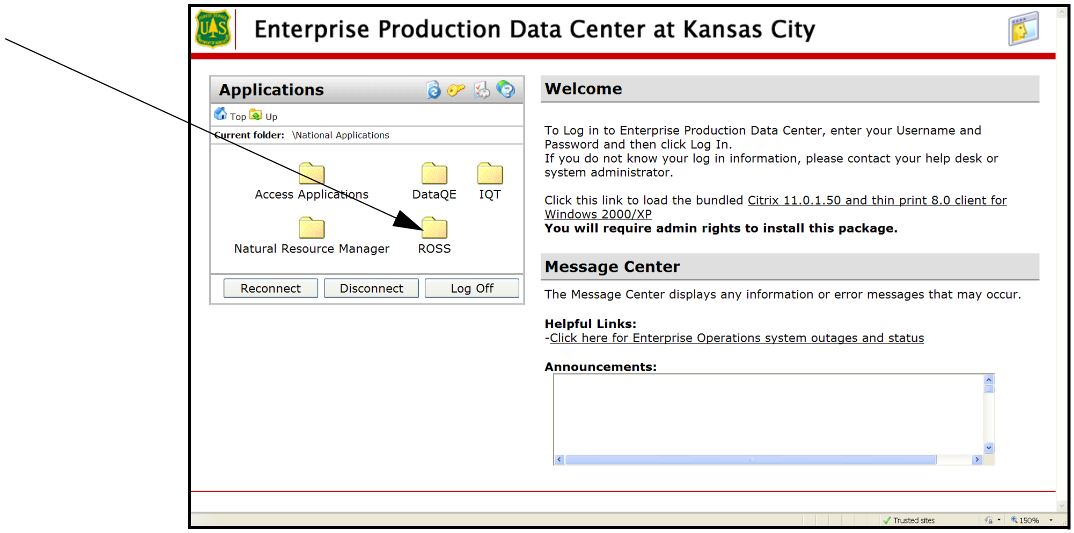
3 On the **Applications** page, navigate to the **\National Applications\ ROSS** folder, and then click the **ROSS** icon of your choice.

4 On the **ROSSHome** screen, click **Yes**, and then log in as usual using your **ROSS username** and **ROSS password**.

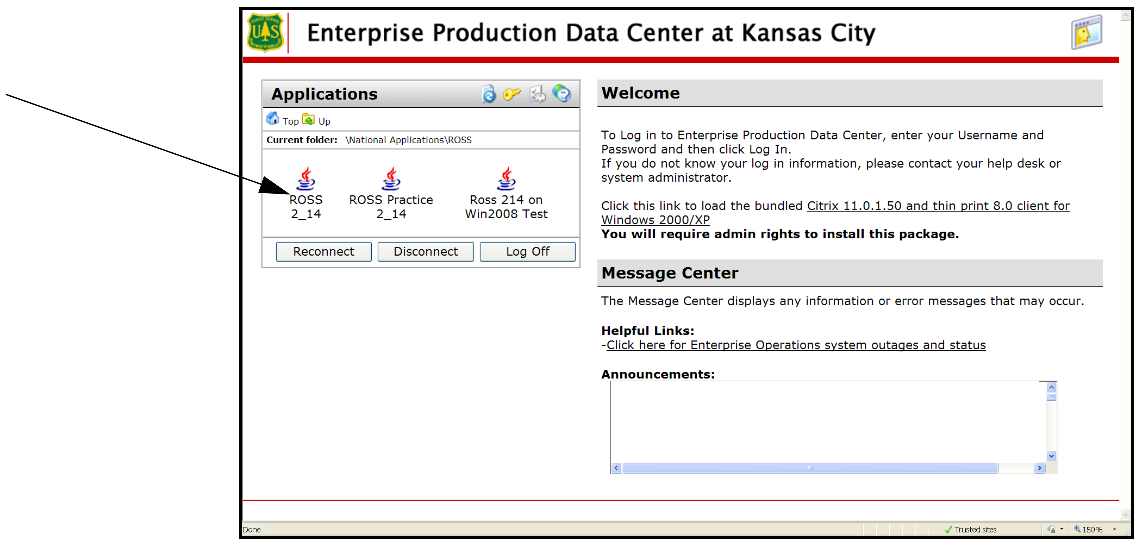
The following diagram shows the Enterprise Production Data Center at Kansas City (Citrix) screen. The arrow points to the Domain Name, "DS," which tells you that you are accessing the Citrix farm from a Forest Service computer



The following diagram shows the \National Applications folder. The arrow points to the ROSS folder.



The following diagram shows the /National Applications\ROSS folder. The arrow points to the ROSS 2_14 icon.

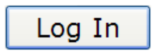


If you are having trouble logging in for the first time see the task, “To manually install the Citrix plug-in onto your laptop or personal computer,” in this section.

To log on to ROSS using Citrix - *for non-FS users only*

1 Start your Internet browser, and then type the following address in the **Address** bar:

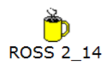
https://ross.fs.fed.us/Citrix



2 On the **Citrix Web Interface Login** screen under **Login**, complete the following information and then click the **Log In** button

- Active Directory user name
- Active Directory password.

The Domain Name should read, "ROSS," on the Citrix Web Interface Login screen.



3 On the **Citrix Web Interface Applications** screen, click the **ROSS 2_14 coffee cup** icon.

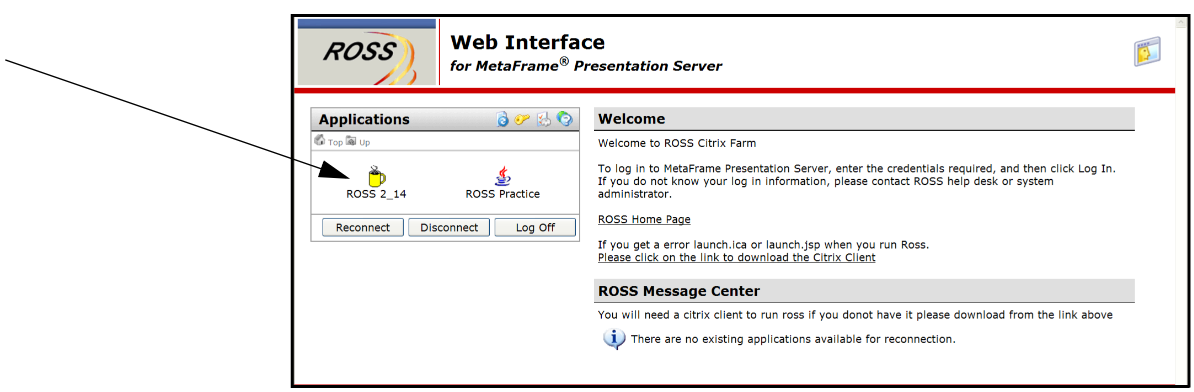
If you are having trouble logging in for the first time see the task, "To manually install the Citrix plug-in onto your laptop or personal computer," later in this section.

4 On the **ROSSHome** screen, click **Yes**.

5 Log in as usual, using your **ROSS username** and **ROSS password**.

The following diagram shows the Citrix Web Interface page. The arrow points to the Domain Name, "ROSS," which tells you that you are accessing the Citrix farm from a non-Forest Service computer.

The following diagram shows the Citrix Web Interface Applications screen, The arrow points to the ROSS 2_14 coffee cup icon.



To exit Cognos Reports, ROSS, and the Citrix server

Be sure to exit ROSS before logging off the Citrix server!

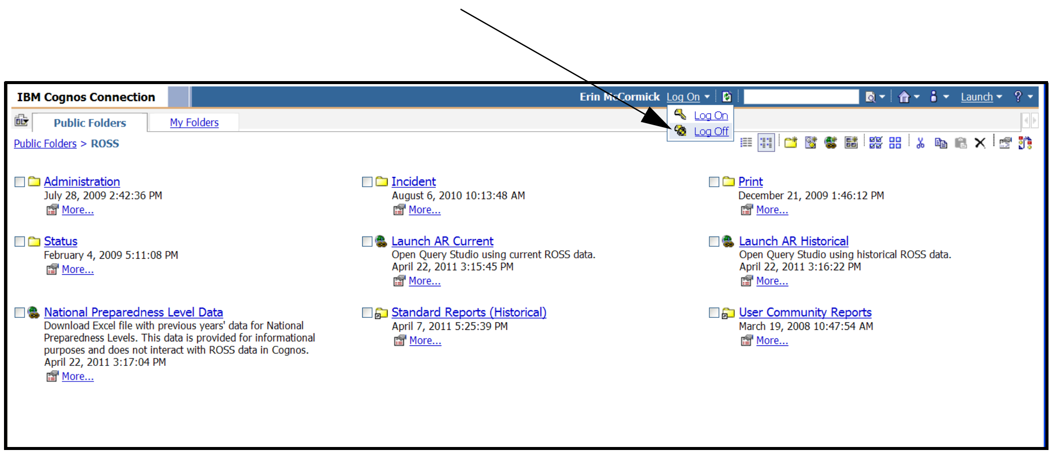
1 On the **IBM Cognos Connection** toolbar, click the **Log On** link, click to select **Log Off**, and then close the **Cognos** browser window.

2 In ROSS, click **Exit ROSS** on the **File** menu, and then click **Yes**.

3 On the E**nterprise Production Data Center at Kansas City (Citrix)** or **Citrix Web Interface Applications** screen, click the **Log Off** button.

4 Close your Internet browser.

The following diagram shows the location of the Log On link. The arrow points to the Log Off option.



To manually install the Citrix plug-in onto your laptop or personal computer

If you are unable to connect to Citrix, you may need to open and install the Citrix plug-in onto your laptop or personal computer. You will need Administrator rights to install.

1 Start your Internet browser and then type the following in the address bar

- http://www.citrix.com

2 On the **Citrix** screen, click **Downloads**.

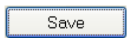
3 On the **The downloads you need in one, easy place** screen, click the **search Downloads by Product** drop-down arrow, and then click to select **XenApp**.

4 On the **Find all downloads you need-fast** screen, scroll to the bottom of the page.

5 Under **Legacy Clients**, click the **Online Plug-In 12.1.144 for Windows Internet Explorer 8 Support** download link.

6 On the **Online Plug-In 12.1.144 for Windows Internet Explorer 8 Support** screen, click the **Download** button to download **Citrix Online Plugin - Web**.

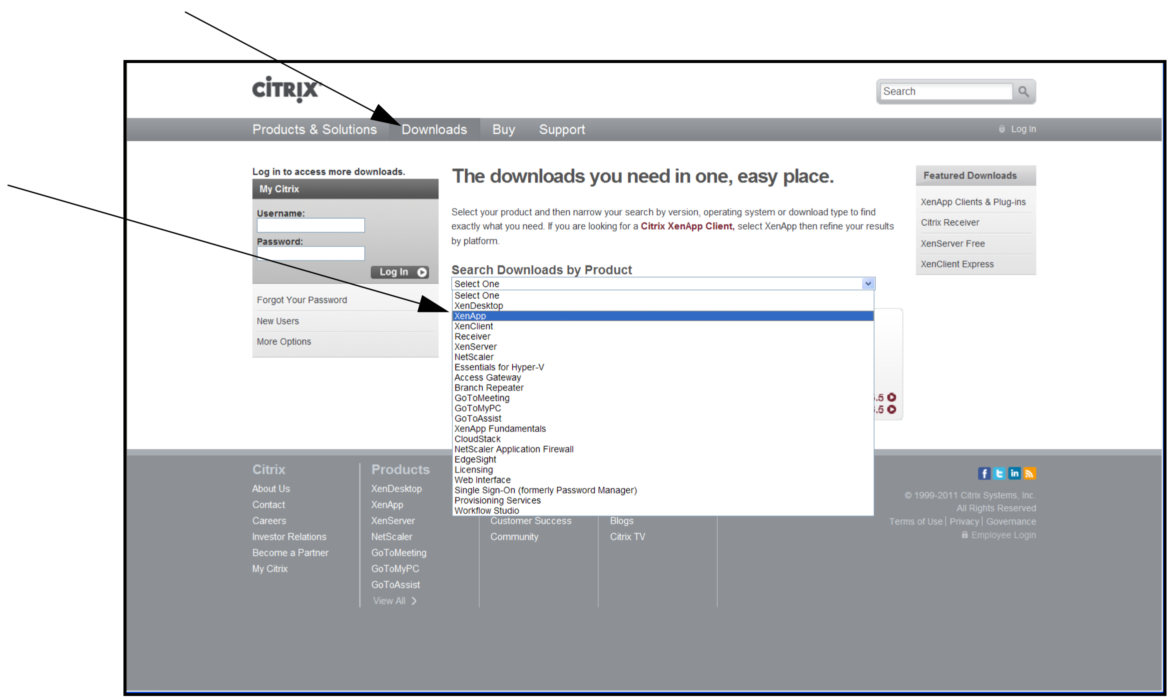
7 On the **Download Manager** dialog box, click the **Download your file manually** link.



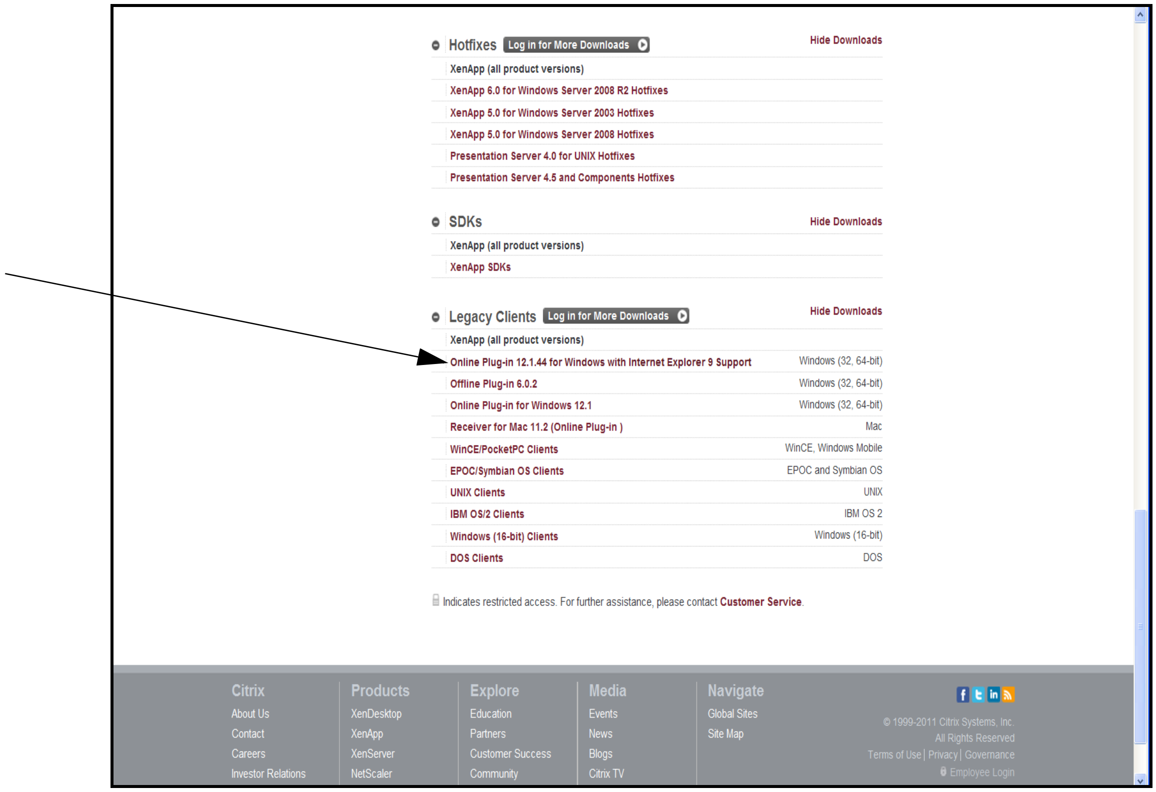
8 On the **File Download** dialog box, click the **Save** button, and then save **CitrixOnlinePluginWeb.exe** to your desktop.

9 On your desktop, double-click the **CitrixOnlinePluginWeb.exe** icon, and then complete the installation as instructed on your screen.

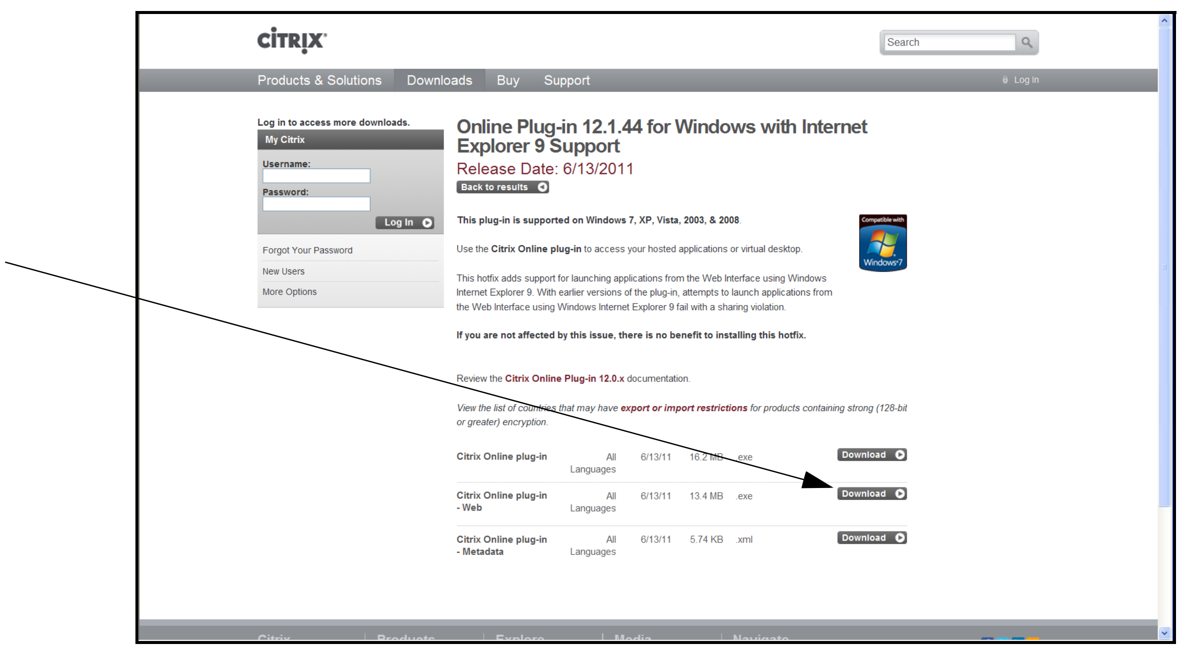
The following diagram shows the Citrix screen. The arrows point to Downloads and the XenApp option on the Search Downloads by Product drop-down menu.



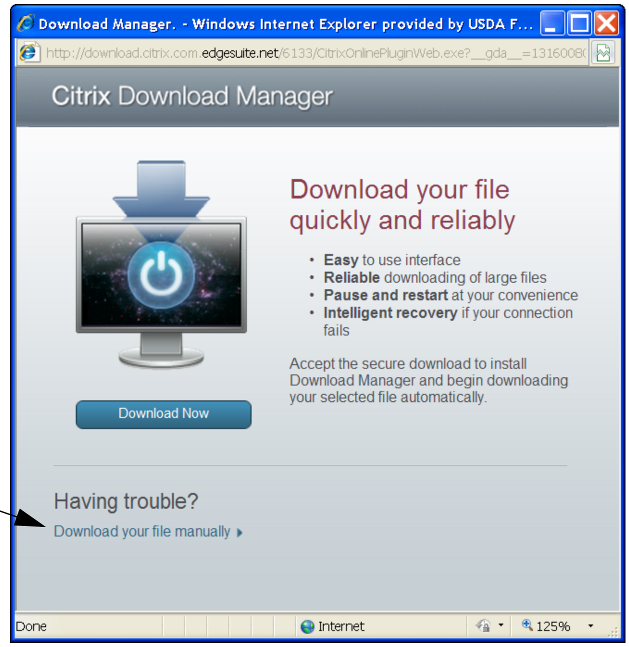
The following diagram shows the bottom of the downloads page The arrow points to the Online Plug-In 12.1.144 for Windows Internet Explorer 8 Support download link.



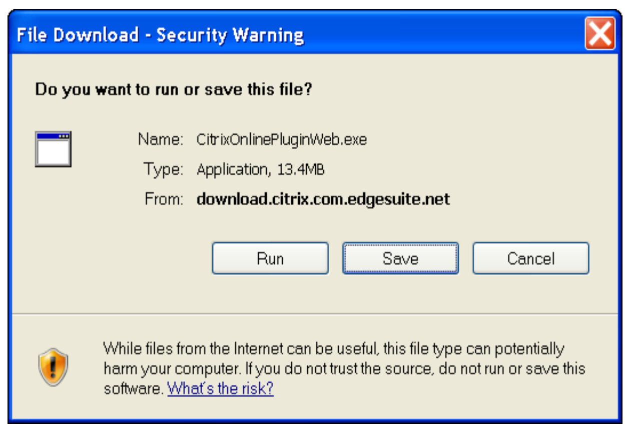
The following diagram shows the Online Plug-In 12.1.144 for Windows Internet Explorer 8 Support screen. The arrow points to the Download button to download the Citrix Online Plugin - Web file.



The following diagram shows the Download Manager dialog box. The arrow points to the Download your file manually link.



The following diagram shows the File Download dialog box.



Working with User Community reports when using Citrix

If you wish to print a User Community report and are using Citrix to access ROSS, you must first save it to one of the following network drives:

- **For Forest Service users.** Save your User Community reports to the Citrix farm, which is located in: **on 'ds.fs.fed.us\Efs'(T:)/DataCenter/citrix/home/your Lotus shortname/My Documents**. To quickly locate these files, you can create a folder in the Citrix farm for your reports and then save it as shortcut to your desktop.

- **For non-Forest Service users**. Save your User Community reports to **C$ on Clint (V:)**/**Documents and Settings/your login folder**/**Desktop**.

User Community reports saved in the Citrix farm contain data from a single point in time. To obtain the most current data, save the User Community report view to "My Folders in Cognos, schedule it to run as needed, and then email it to yourself. From your ISP you can print that report as needed.

Saving and printing User Community reports when using Citrix - *for FS users only*

This section explains to save and print User Community reports when using Citrix to access ROSS from a Forest Service computer.

To create a shortcut to the Citrix farm

1 In **Windows Explorer**, click **My Computer**, and then click the **on 'ds.fs.fed.us\Efs'(T:)** drive.

2 On the **on 'ds.fs.fed.us\Efs'(T:)** drive, click the **DataCenter** folder, click the **citrix** folder, and then click the **Home** folder.

3 In the **Home** folder, click the your **DS user name** folder, and then click the **My Documents** folder.

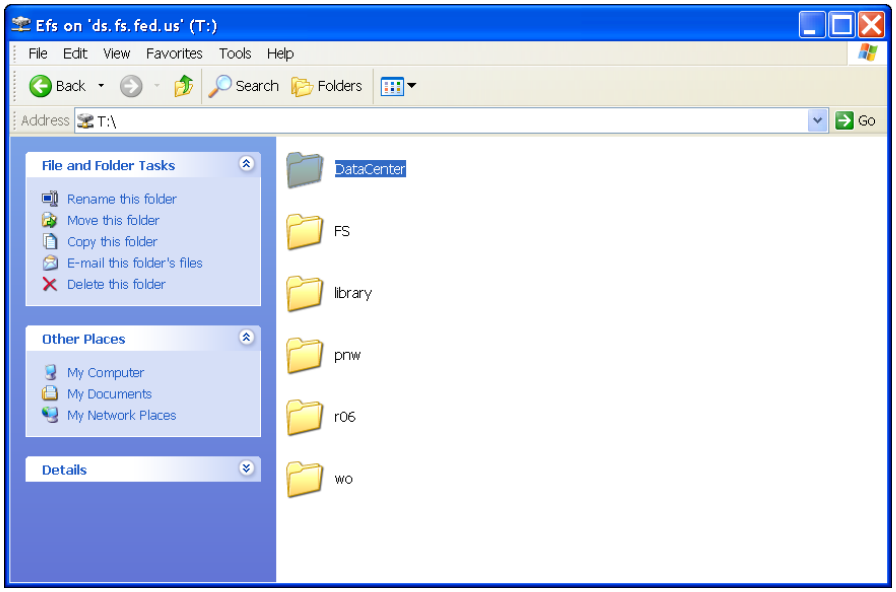
Your DS user name is your log in User name when you log onto your FS computer. For example, John Doe would click his DS user name folder, "jdoe."

4 In the **My Documents** folder, right-click and point to **New**, click **Folder**, and then name the new folder with a name of your choice.

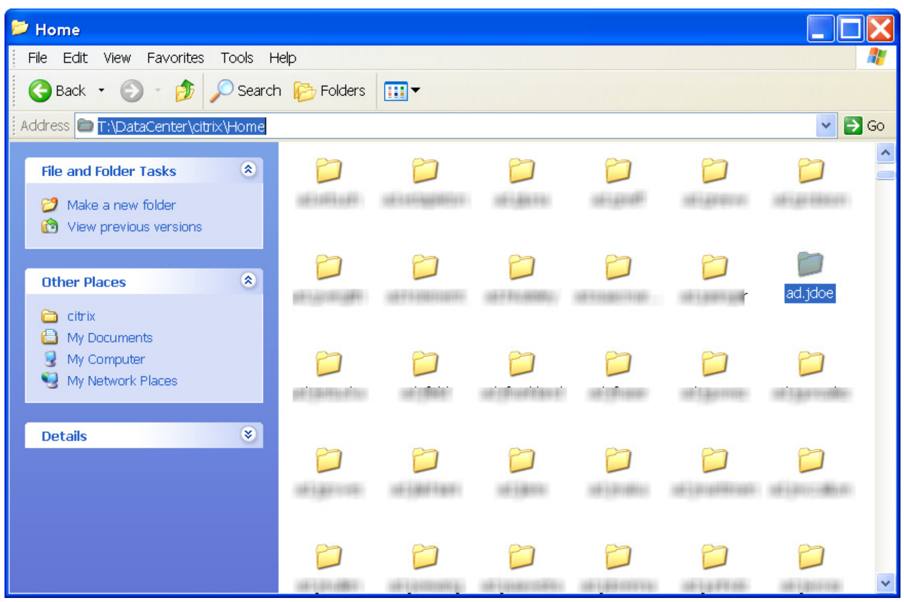
In this example this new folder is named, "ROSS Reports."

5 Right-click the folder you just created, point to **Send To**, and then click **Desktop (create shortcut)**.

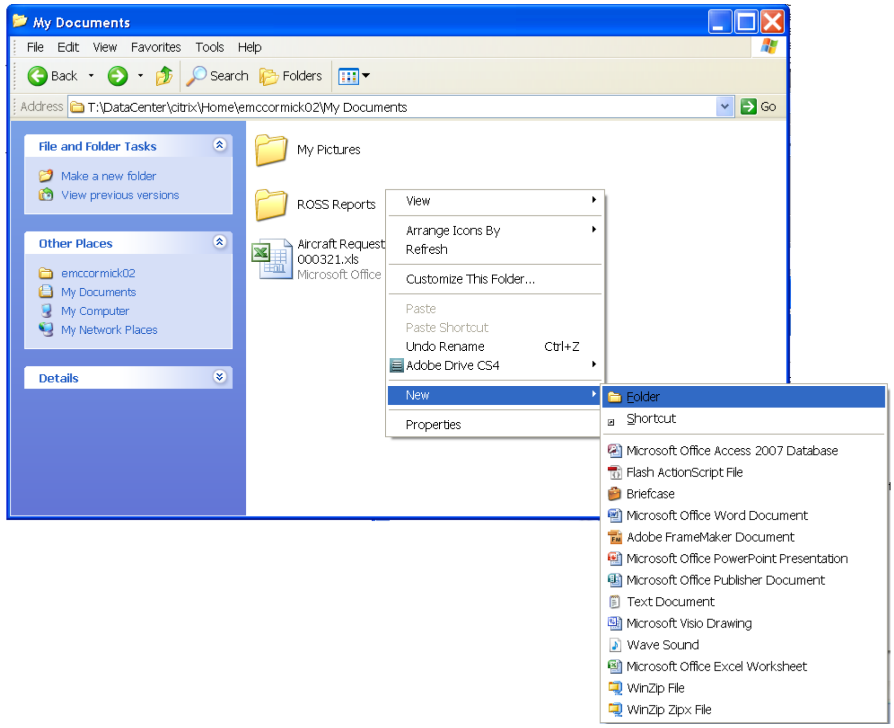
The following diagram shows the DataCenter folder on the on 'ds.fs.fed.us\Efs'(T:) drive in Windows Explorer.



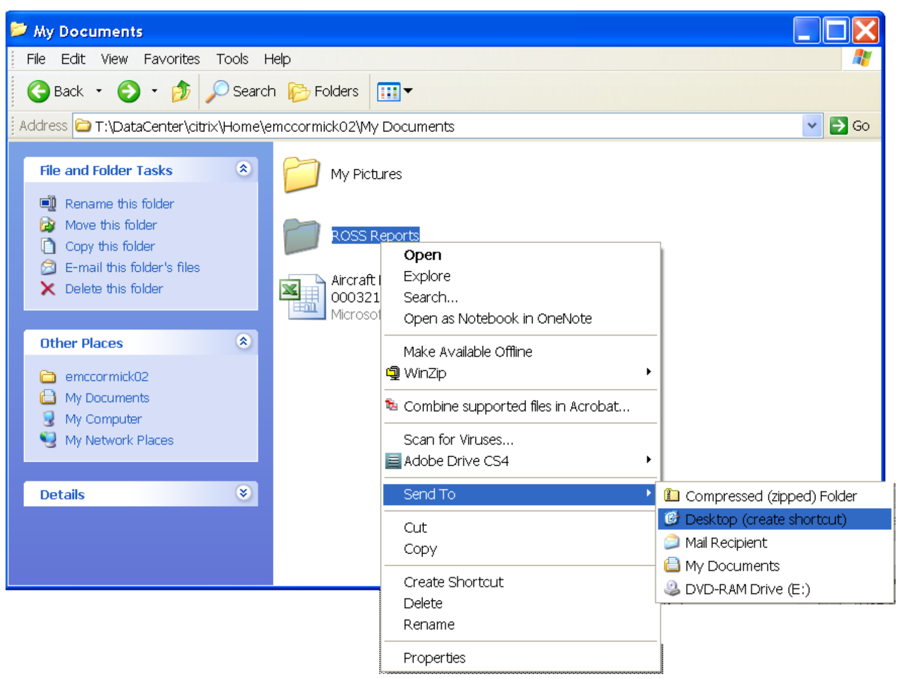
The following diagram shows the location of the "ad.jdoe" folder (your Lotus shortname folder) in on 'ds.fs.fed.us\Efs'(T:)/DataCenter/citrix/home**.**



The following document shows the menu for creating a new folder in your "My Documents" folder.

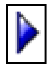


The following diagram shows the menu for creating a shortcut to a sample new folder, "ROSS Reports," to your desktop.



To save a User Community report in another format of your choice using Citrix to access ROSS

1 Create a **Report View** of the **User Community report** of your choice and save it in **My Folders in Cognos**.

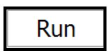


2 Click the **My Folders** tab, and then click the **Run with options** button for that **Report View**.

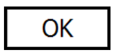
3 On the **Run with options** screen, click the **Format** drop-down arrow, and then click to select the **report format** of your choice.

4 Under **Delivery**, click to select **View the report now**.

5 If not already selected, click to select the **Prompt for values** check box.



6 Click the **Run** button.



7 On the **Prompt** screen, click to select the report values of your choice, and then click **OK**.

8 On the **File Download** dialog box, click **Open**.

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*You must first click **Open** before saving the report to your Citrix farm shortcut. Do not click Save! If a warning/error message displays after clicking Open, click **Yes** to **Open the file now**.*

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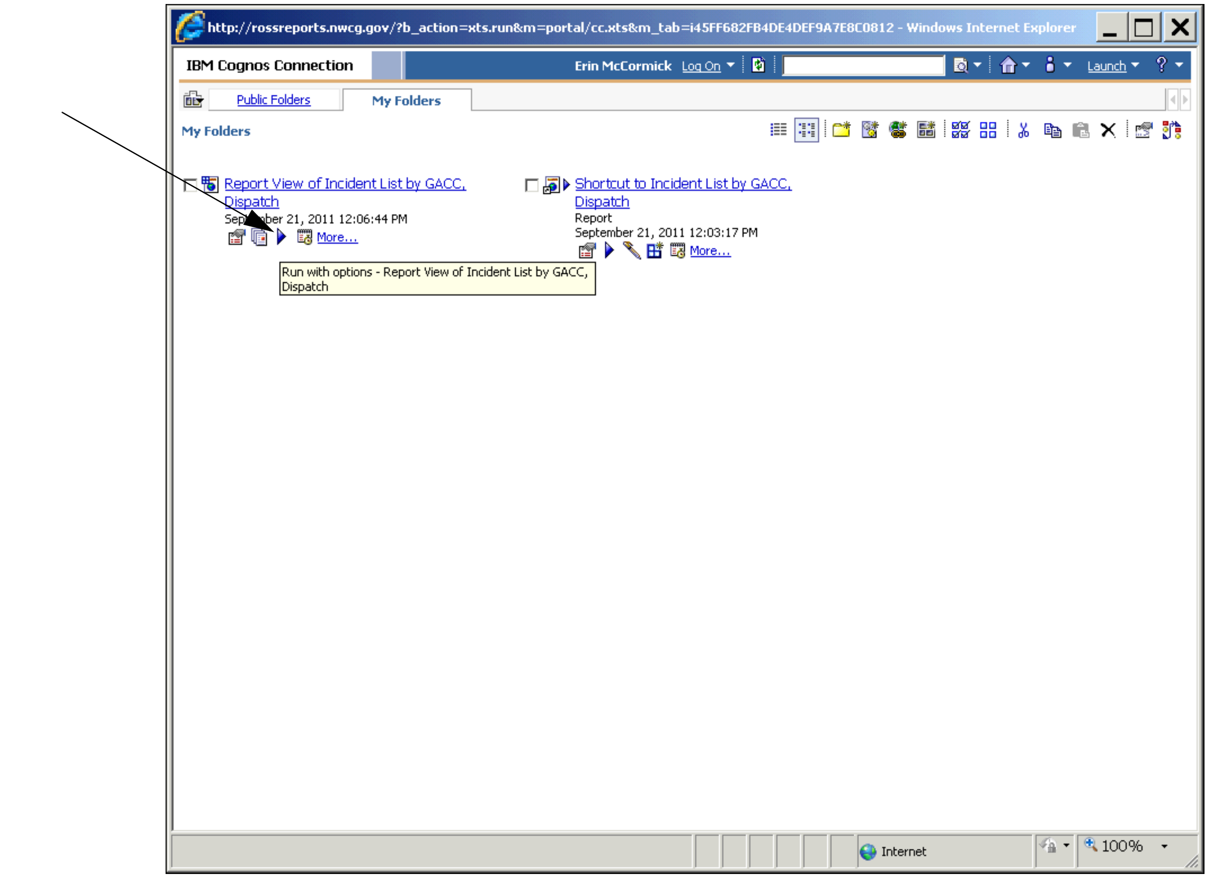
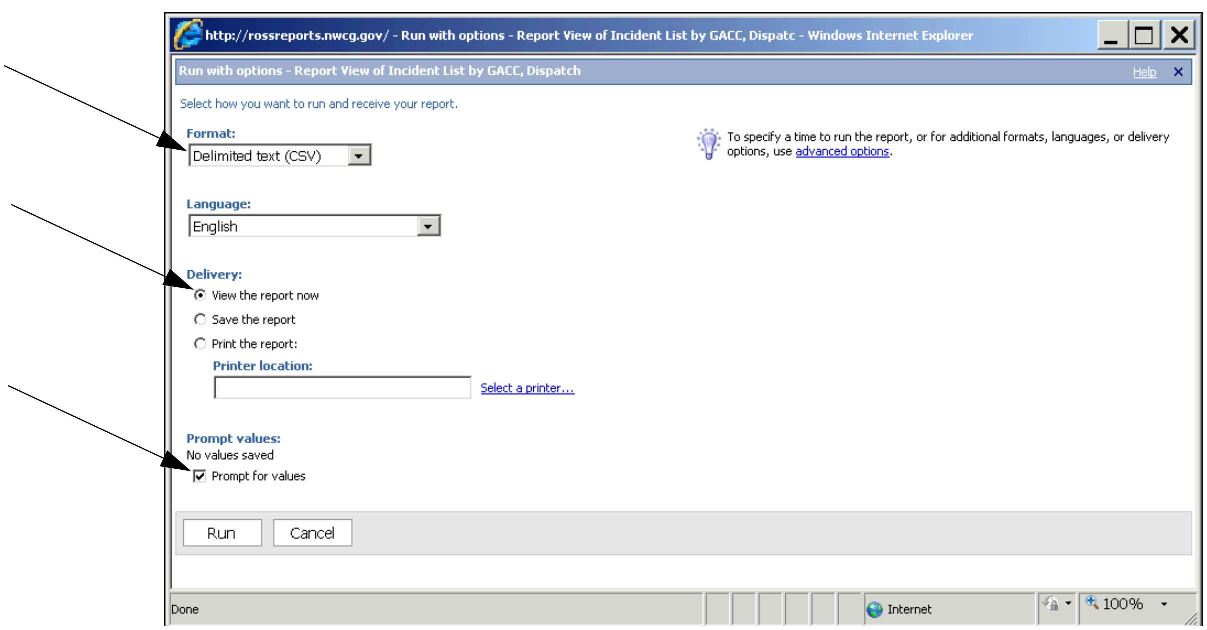
9 Once the report opens in the appropriate software for that report's file extension, save it to the Citrix farm.

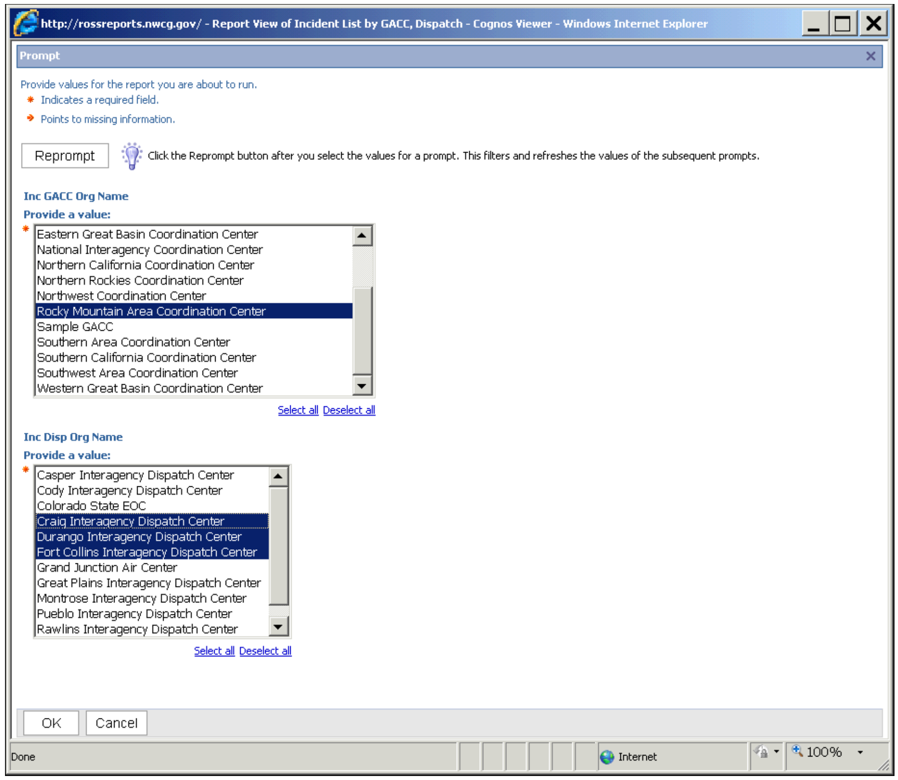
The following diagram shows the My Folders tab. The arrow points to the Run with options button for the Report View of Incident List by GACC, Dispatch.



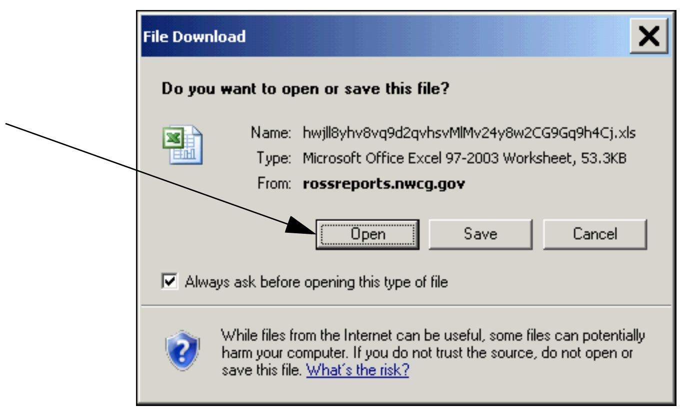
The following diagram shows the Run with options screen. The arrows point to the View this report now option and the



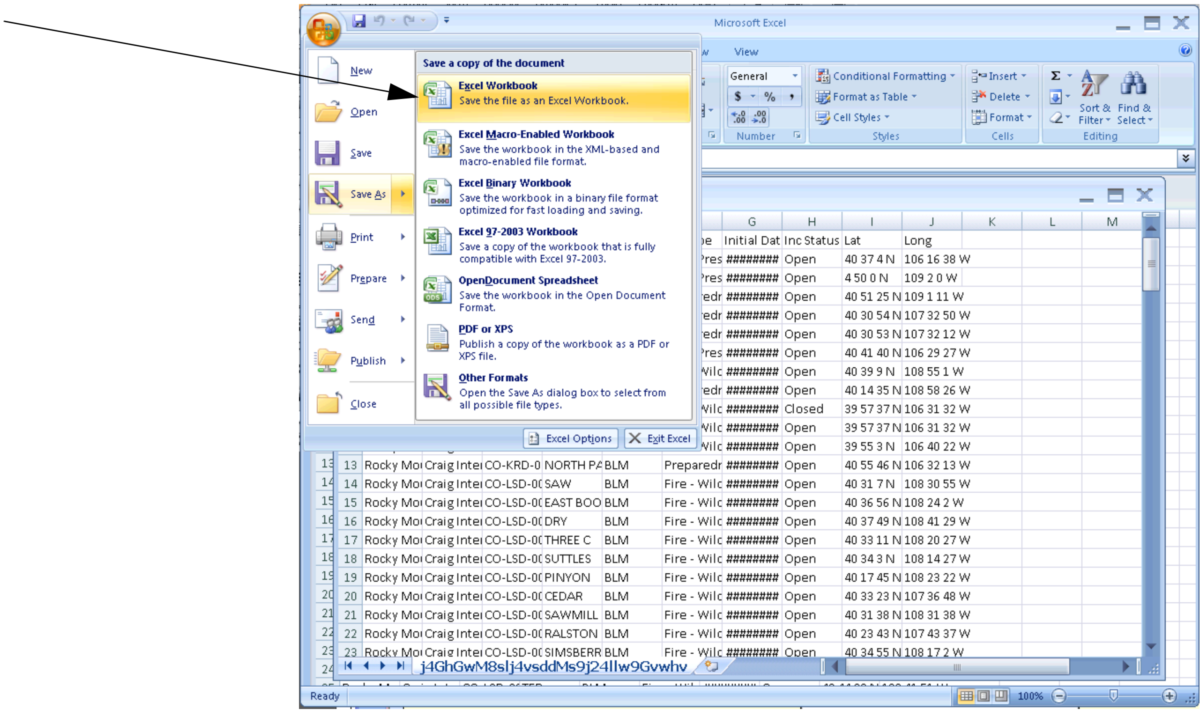
The following diagram shows a sample Prompt screen for the Incident List by GACC, Dispatch report.



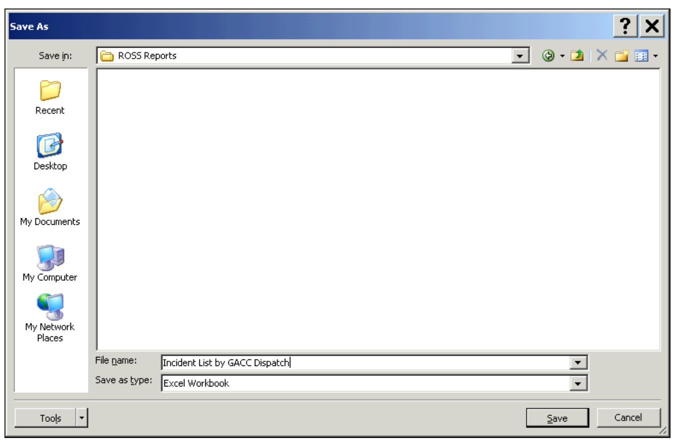
The following diagram shows the File Download dialog box. The arrow points to the Open button.



The following diagram shows a sample report saved as .CSV and opened in Microsoft Excel. The arrow points to the Save As option in Excel.



The following diagram shows a sample Save As dialog box for saving a report to your Citrix farm.



To access a saved User Community report when using Citrix

Remember, to obtain current data for the report you must rerun the Report View from My Folders in Cognos and then save it again to the Citrix farm! For more information see, "To save your User Community report view to My Folders," in the section, "Running, saving, scheduling, and printing User Community reports," earlier in this ROSS User's Guide.

- From your **Desktop**, locate and click to open the **shortcut to the Citrix farm**, and then open the **User Community report** of your choice.

To print a saved User Community report when using Citrix to access ROSS

1 From your **Desktop**, locate and click to open the **shortcut to the Citrix farm**, and then open the **User Community report** of your choice.

2 Adjust the layout of the **report** as needed, and then click **Print** using the software you used to open the saved report.

3 Complete the **Print** dialog box as appropriate.

For more information about creating this shortcut see, "To create a shortcut to the Citrix farm," earlier in this section.

Saving and printing User Community reports when using Citrix - *for non-FS users only*

This section explains to save and print User Community reports when using Citrix to access ROSS from a non-Forest Service computer.

Non-FS users must have an Active Directory account to use Citrix. For more information contact the ROSS Citrix coordinator for your geographic area.

To access a saved User Community report when using Citrix

1 From Windows Explorer, navigate to the following folder

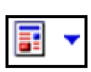
C$ on Clint (V:)/Documents and Settings/your login folder/Desktop.

2 Locate and then click to open the **User Community** report of your choice.

To save a User Community report when using Citrix to access ROSS

*While using Citrix, you must first **save any User Community reports to your desktop** before you can view or print!*

1 Create the **User Community report** of your choice.



2 On the **Cognos Viewer** toolbar, click the **View in PDF format** drop-down arrow, and then click to select the **View in...** of your choice.

In this example, the report is saved in .CSV format.

3 On the **File download** dialog box, click **OK.**

4 On the **Save As** dialog box, click the **Save in** drop-down arrow, and then click to select **C$ on Client (V:)**.

5 Double-click the **Documents and Settings** folder, and then double-click **your login** folder.

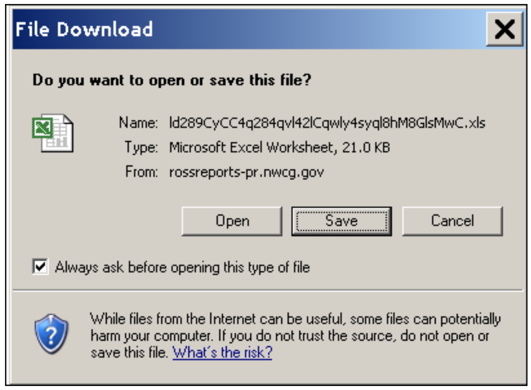
For example, the login folder for John Doe might be named "jdoe."

6 In **your login** folder, double-click the **Desktop** folder.

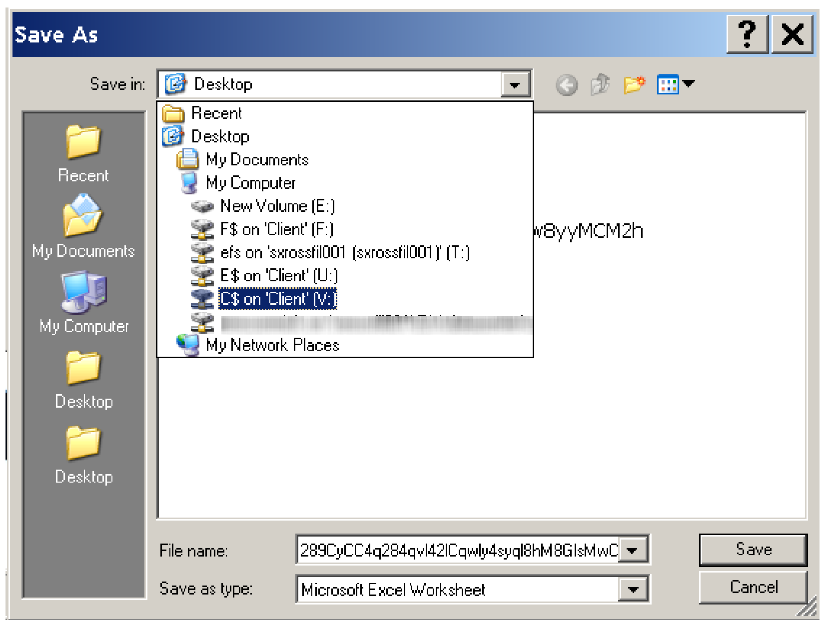
7 Navigate to the **folder** of your choice, and then click **Save**.

8 On the **Download complete** dialog box, click **Close**.

The following diagram shows the File download dialog box.



The following diagram shows the Save As dialog box for saving a report on the C$ on Client (V:) drive.



To print a saved User Community report when using Citrix to access ROSS

To print, you must close the report and then open it from your personal computer. You can not print from Citrix!

1 From Windows Explorer, navigate to the following folder

C$ on Clint (V:)/Documents and Settings/your login folder/Desktop.

2 Locate and then click to open the **User Community** report of your choice.

3 Adjust the layout of the **report** as needed, and then click **Print** using the software you used to open the saved report.

4 Complete the **Print** dialog box as appropriate.