# OCFS Data Warehouse
# IBM Cognos 10: Quick Reference Guide

## Logging into Cognos

1. Open **Internet Explorer** from your local desktop.
2. At the top of the Internet Explorer screen, type the appropriate web address, and press the **Enter** key on your keyboard:

| | |
|---|---|
| Local Districts and State Staff | https://cognos.otda.state.nyenet/cognos or https://10.64.8.28/cognos<br>*If a pop-up login box appears, enter your HSEN ID (hsen/ab1234) and password to proceed.* |
| SSL/VPN Agency Staff | https://rc1.its.ny.gov/hsen<br>*Make sure your LAN Admin or LSA has submitted form OCFS-4827 "SSL VPN Request for Access" to data.warehouse@ocfs.ny.gov. This form must be approved by the Data Warehouse team in order for the Cognos link to be added.* |

3. If a confidentiality warning displays, read it and click **I Accept.**
4. When the "IBM Cognos software" screen displays, click on the **My home** link. You can bypass this welcome screen in the future by unchecking the "Show this page in the future" box.

   *If you do not see the "IBM Cognos software" screen, you may not have access to Cognos. See the "Resources" section below.*

## Adding Cognos to your Internet "Favorites"

1. With the IBM Cognos Connection screen open, click on **Favorites** from the menu at the top of the Internet Explorer screen.
2. Select **Add to Favorites…** from the drop-down list.
3. In the Add a Favorite dialog box, change the text in the **Name** area to "Cognos 10," and click on the OK button.

   *The next time you want to access Cognos, open Internet Explorer, click on the **Favorites** menu, and select **Cognos 10** from the drop-down list.*

## Adding the OCFS Data Warehouse Tab

*This set-up only needs to be done if you do not see the OCFS Data Warehouse tab on the IBM Cognos Connection screen.*

1. From the IBM Cognos Connection screen, click on the **Tab Menu** icon located to the left of the Public Folders and My Folders tabs.
2. Select **Add tabs…** from the resulting list.
3. Click on the link for **Public Folders**.
4. Click on the link for the **Global Reports** folder.
5. Click on the link for the **Portal Pages** folder.
6. In the Available Entries section, place a check mark in the box to the left of **OCFS Data Warehouse**.
7. Click on the green arrow in the center of the window to move this item to the Selected Entries section.
8. Click on the **OK** button to add the OCFS Data Warehouse tab.

## Modifying the Portal Tab Order

1. From the IBM Cognos Connection screen, click on the **Tab Menu** icon located to the left of the Public Folders and My Folders tabs.
2. Select **Modify the sequence of tabs…** from the resulting list.
3. Use the **Up**, **Down**, **To Top**, and **To Bottom** links to rearrange the sequence of the tabs to the desired order.
4. Click on the **OK** button.

## Setting the "Home" Portal Tab

1. Click once on the OCFS Data Warehouse tab.
2. Click on drop-down arrow next to the Home icon , in the upper right corner of the IBM Cognos Connection screen.
3. Select **Set View as Home**.

## Running Predefined Reports

*Note: Internet Explorer and toolbar pop-up blockers must be disabled to run reports.*

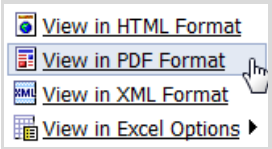
1. From the IBM Cognos Connection screen, make sure you are on the **OCFS Data Warehouse** tab.

   *If you do not see the OCFS Data Warehouse tab, review the section titled "Adding the OCFS Data Warehouse tab."*
2. Click once on the folder name containing the subject matter of the reports you are interested in viewing. For example, the FASP Reports folder contains predefined reports about FASPs.
3. Click once on any report name to run the report.

   *Predefined reports are typically set to run in HTML format. To run reports in a format other than HTML use the **Run with options** icon across from the report name.*
4. If a prompt page displays, make your selection(s) and click the **Next** or **Finish** button to progress through the prompt screens.
5. Once you click on the **Finish** button, a spinning hourglass will display on the screen while the report output is generating.

## Saving Report Output in PDF Format

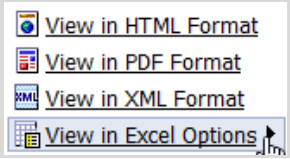
1. With the HTML output open on the screen, click once on the drop-down arrow next to the **View in HTML Format** button.
2. Select **View in PDF Format**.



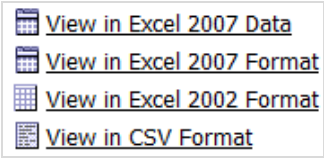

3. Once the report generates in PDF format, select **File > Save As** from the top of the PDF screen.
4. At the **Save As** window, navigate to the location where you want to save the file.
5. In the **File name** area, type a name for the file.
6. Make sure the **Save as type** is set to Adobe PDF Files (*.pdf).
7. Click on the **Save** button.

## Saving Report Output in Excel Format

1. With the HTML output open on the screen, click once on the drop-down arrow next to the **View in HTML Format** button.
2. Select **View in Excel Options**.




3. Select the desired Excel option.




4. Once the report generates in Excel format, select **File > Save As** from the top of the Excel screen.
5. At the **Save As** window, navigate to the location where you want to save the file.
6. In the **File name** area, type a name for the file.
7. Make sure the **Save as type** is set to Excel Workbook (*.xlsx) or whichever Excel format is compatible with your computer.
8. Click on the **Save** button.

## Logging Off

1. Click on the **Log Off** hyperlink at the top of the screen.
2. At the top of the Internet Explorer screen, select **File > Close**.

## Resources

- Send questions about OCFS Data Warehouse reports and access to data.warehouse@ocfs.ny.gov.
- Visit the OCFS Data Warehouse Intranet page at http://ocfs.state.nyenet/connect/datawarehouse.

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