

Supplement Thirteen

JFS BI Reporting Development Standards

Ohio

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Job and Family Services

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OHIO DEPARTMENT OF JOB & FAMILY SERVICES
OFFICE OF INFORMATION SERVICES
APPLICATION DEVELOPMENT
BUSINESS INTELLIGENCE SECTION



COGNOS BI REPORTING
DEVELOPMENT BEST PRACTICES

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August 23, 2011

JFS Cognos BI Reporting Development Best Practices

Framework Manager (FM) Modeling standards:

- The FM model should be a dimensionalized model per IBM Cognos best practices which include the following:
 - Physical model with joins,
 - Logical model with business names,
 - Calculations organized in a folder/namespace,
 - Filters organized in a folder/namespace
 - Security Filters organized in a folder/namespace
 - Reporting model which is the dimensional model with Model query subjects.
 - Where there is a need for Custom SQL, use it in the Model query subjects with Datasource SQL. (Always use Cognos SQL and not native SQL)

Reporting development standards:

- The Reports should always use the FM model per IBM Cognos best practices
 - Use dimension tables to populate the prompts.
 - Filters and calculations specific to the report should be created at this level.
 - Do not use custom sql for creating query subjects. An alternate solution is to create custom query subjects in FM model.
 - For history reports, tables should be designed to keep track of the history. Do not use Report PDFs archiving for history.

Security standards:

- When designing security, following should be considered.
 - Data level security should be implemented in the FM model, so any report designed against the data is secured.
 - Security should be implemented at package and folder level.
 - If the data in a report is confidential, consider using data level security.
 - Do not implement security, to prevent a certain group from running it. Security should be implemented only if a certain group should not or cannot see the data.
 - Matching roles to the application are not necessary. Security structure should be simple and separate from application. Keep in mind that the users do not have write capabilities for running reports.

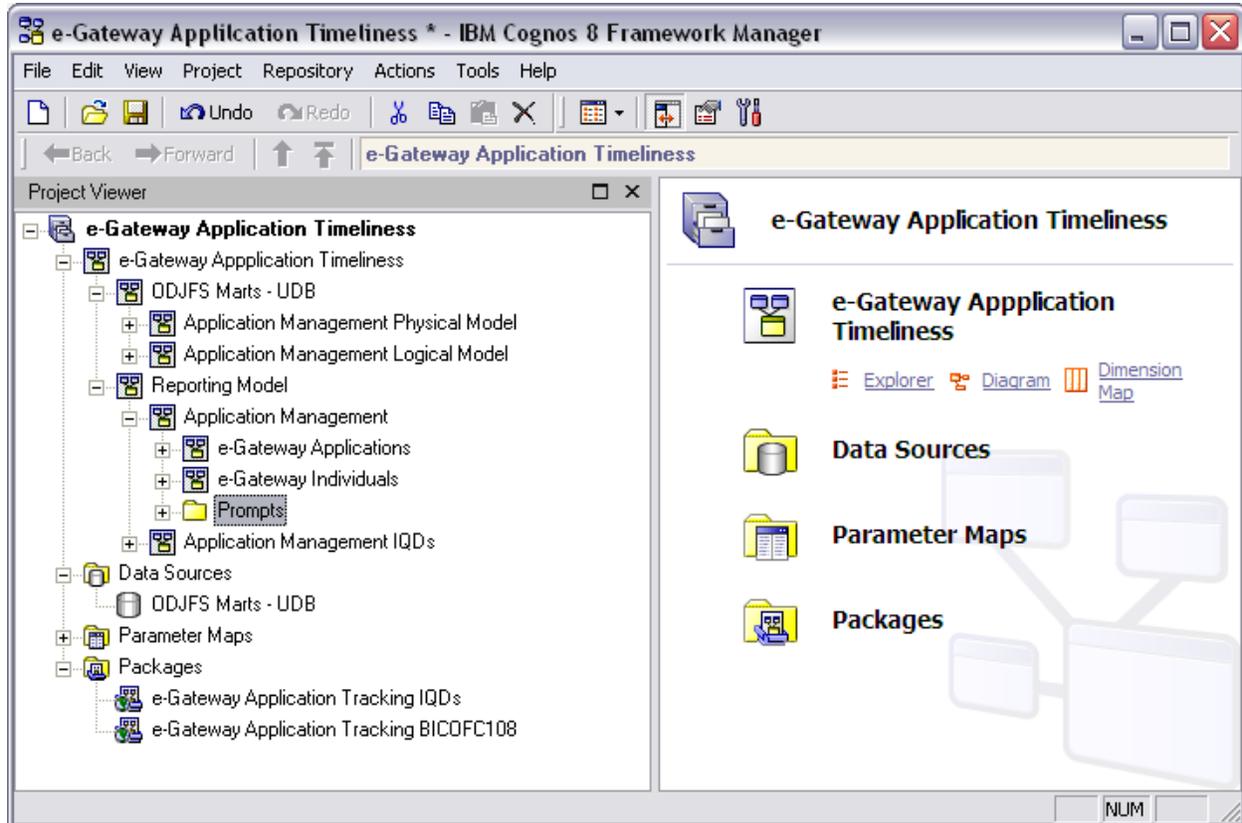
How many models or packages does a project need?

- ❖ After analyzing the different projects both operational and BI, the number of models or packages should be decided based on the number of reports, complexity in reports. One option can be selected, keeping in mind the pros and cons in creating and maintaining the models .

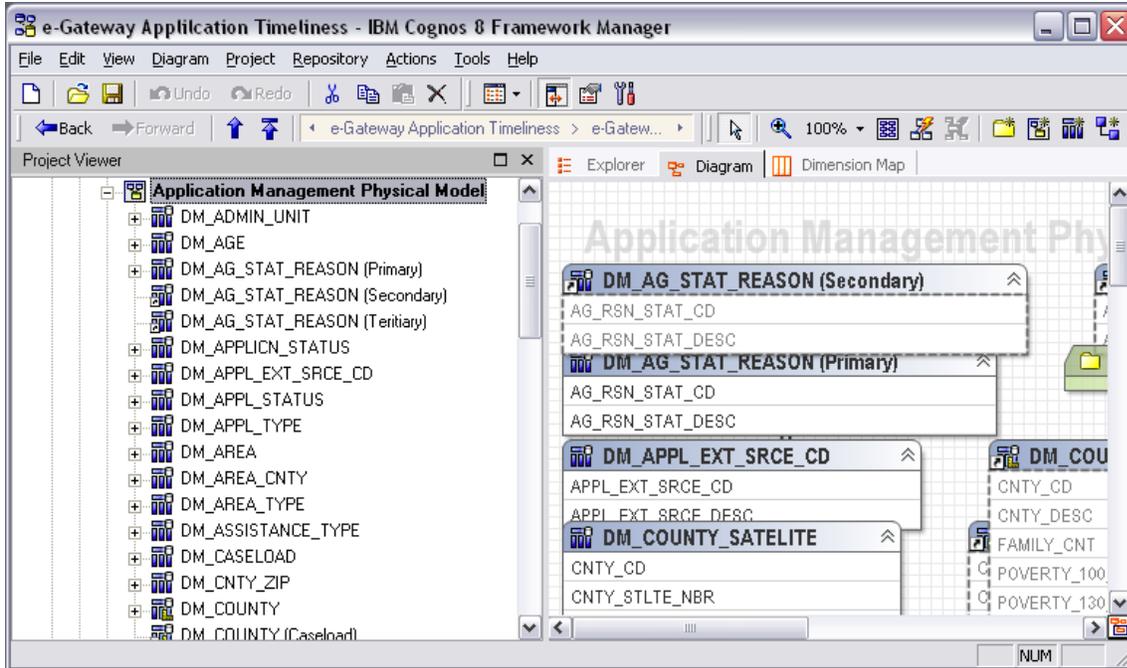
- Creating one model with one or more packages :
 - Pros:
 - Any changes in the database can be updated in one FM model.
 - One developer can maintain the model.
 - Cons:
 - FM doesnot support multiple users at any given time.
 - The model will be complex to maintain.
 - Any changes to the model will impact all reports, take longer to save and publish.
 - Any time changes are implemented for joins, regressions testing for all reports should be done.
 - We had issues with models getting corrupted, when large.
- Creating multiple models with one package for each model. One FM model per subject area will be feasible and easier to maintain.
 - Pros:
 - Any changes to the model like joins, calculations and filters in one subject area impact a subset of the reports. Regression testing for that subject area should be done.
 - Model will be less complex and easier to maintain.
 - Multiple developers can work on the models.
 - Publishing and saving the models will be quicker.
 - Cons:
 - Any changes to the databases must be implemented in all the models.
 - Any time changes are implemented for joins, regressions testing for all reports should be done.

Framework Manager (FM) Modeling standards:

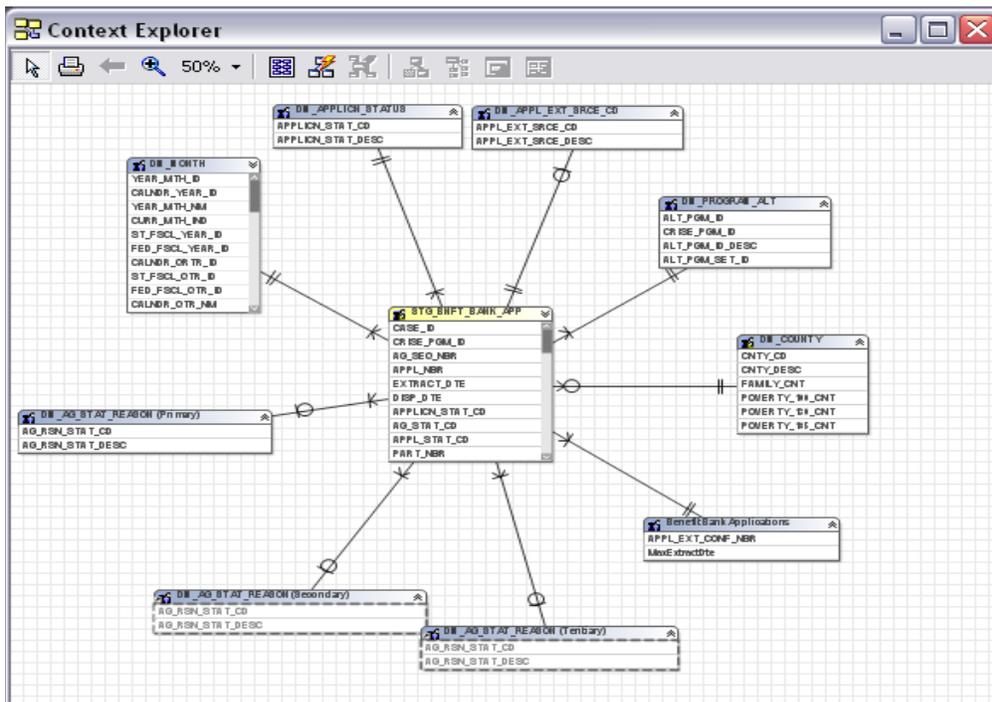
- The FM model should include the following :
 - Three Layers
 - Physical Model
 - Logical Model
 - Reporting Model
 - One or more datasources
 - One or more packages



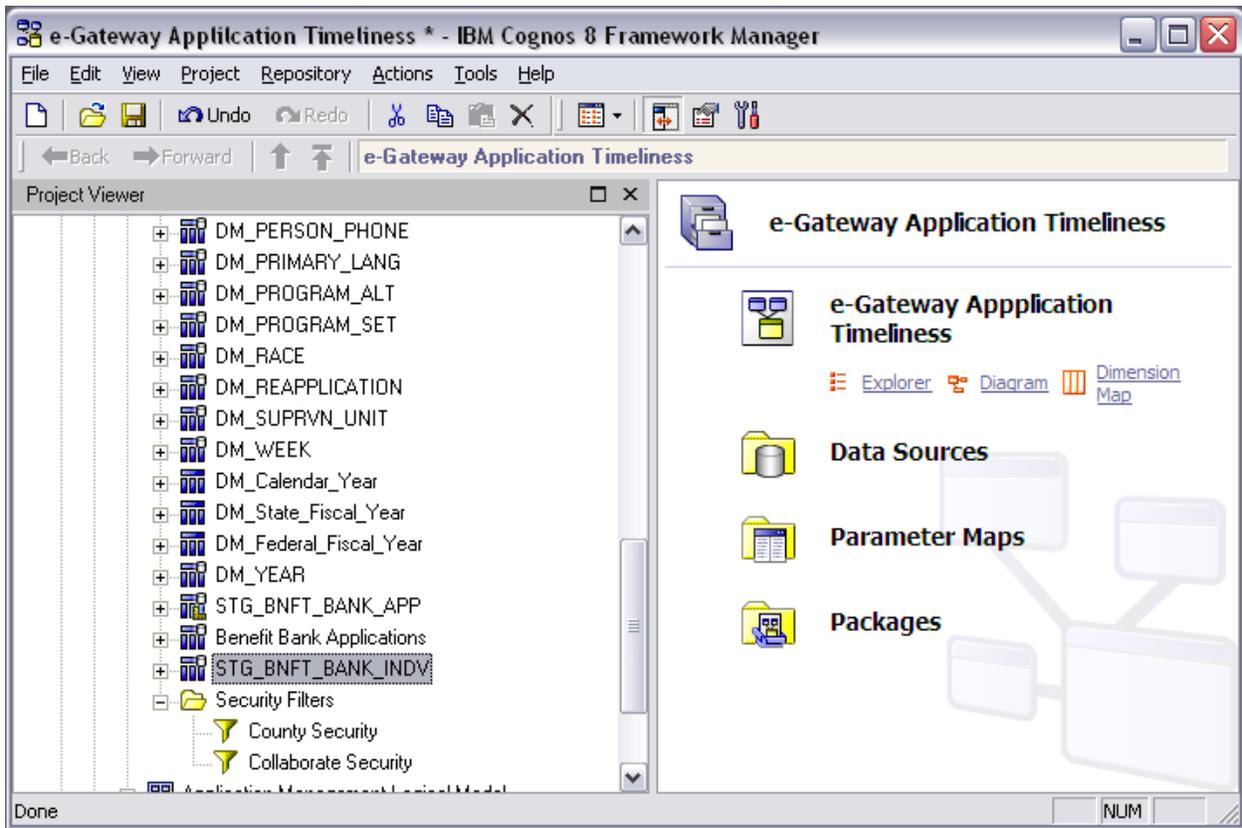
- Physical model with joins – Tables imported from the database.
- Where there is a need for Custom SQL, these should be created in the Physical Model with Datasource SQL. (Always use Cognos SQL and not native SQL). Please use IBM Cognos naming standards for Custom Query



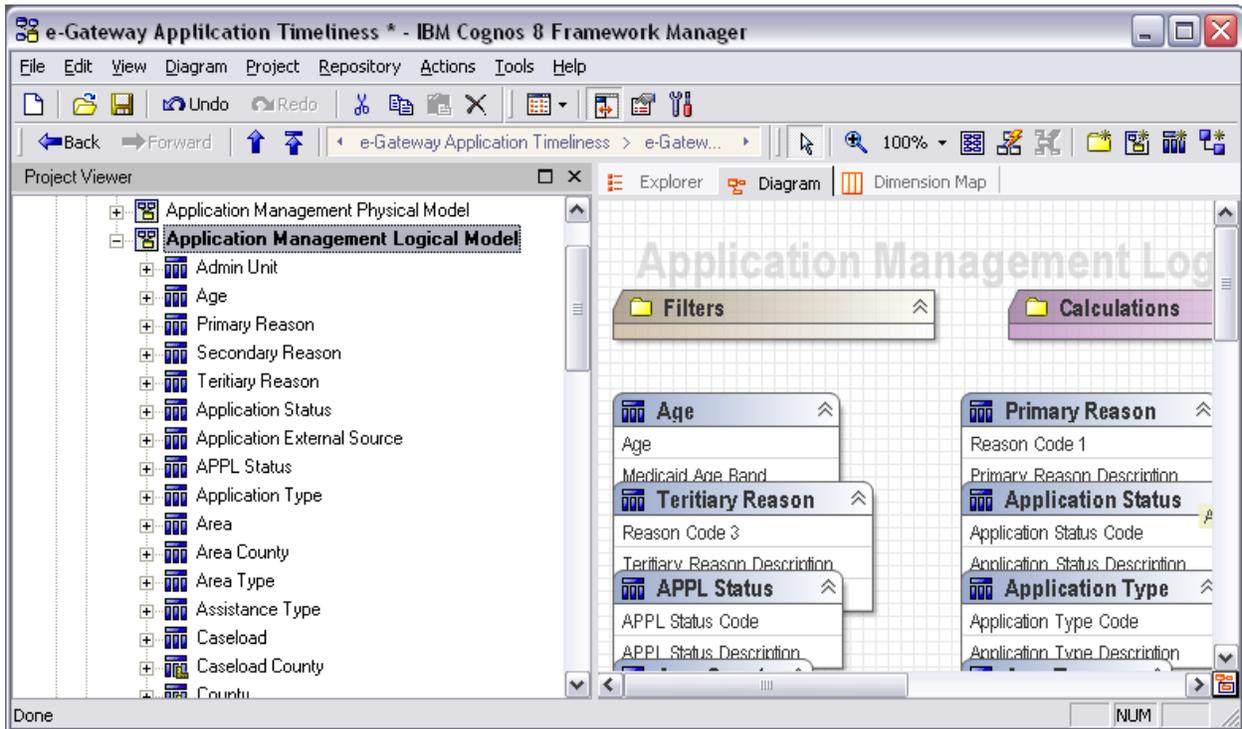
- Joins should be created at this level. IBM Cognos standard is dimensionalized models



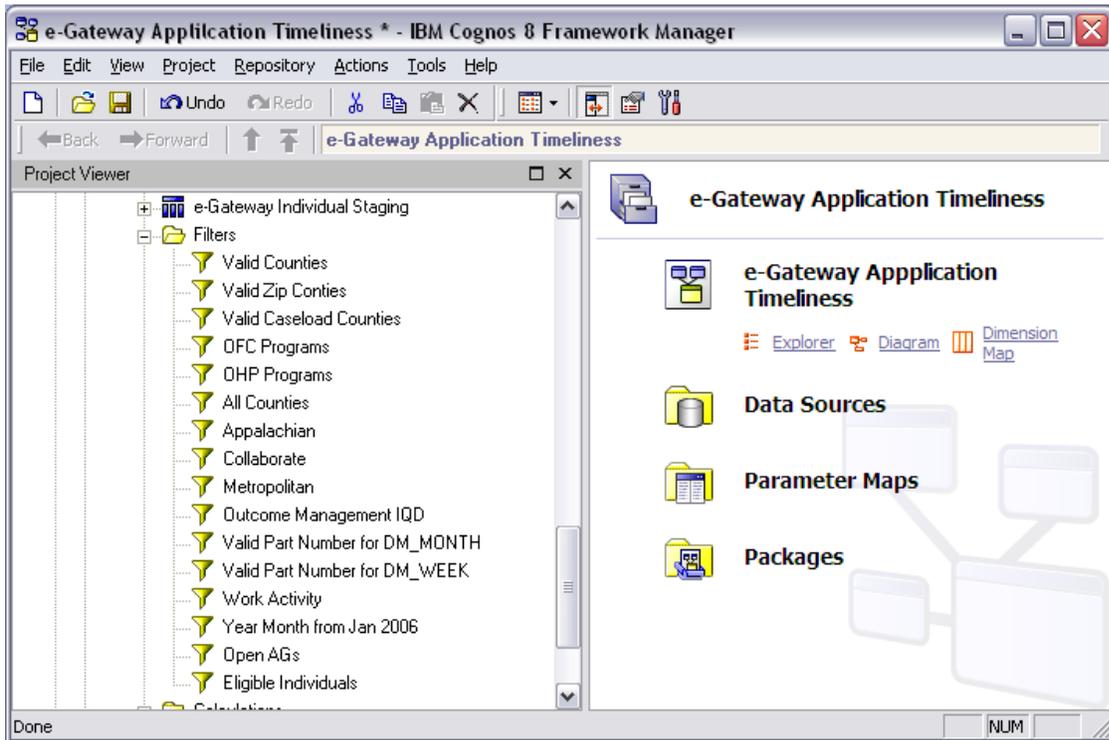
- Row level Security Filters created at this level and organized in a folder.



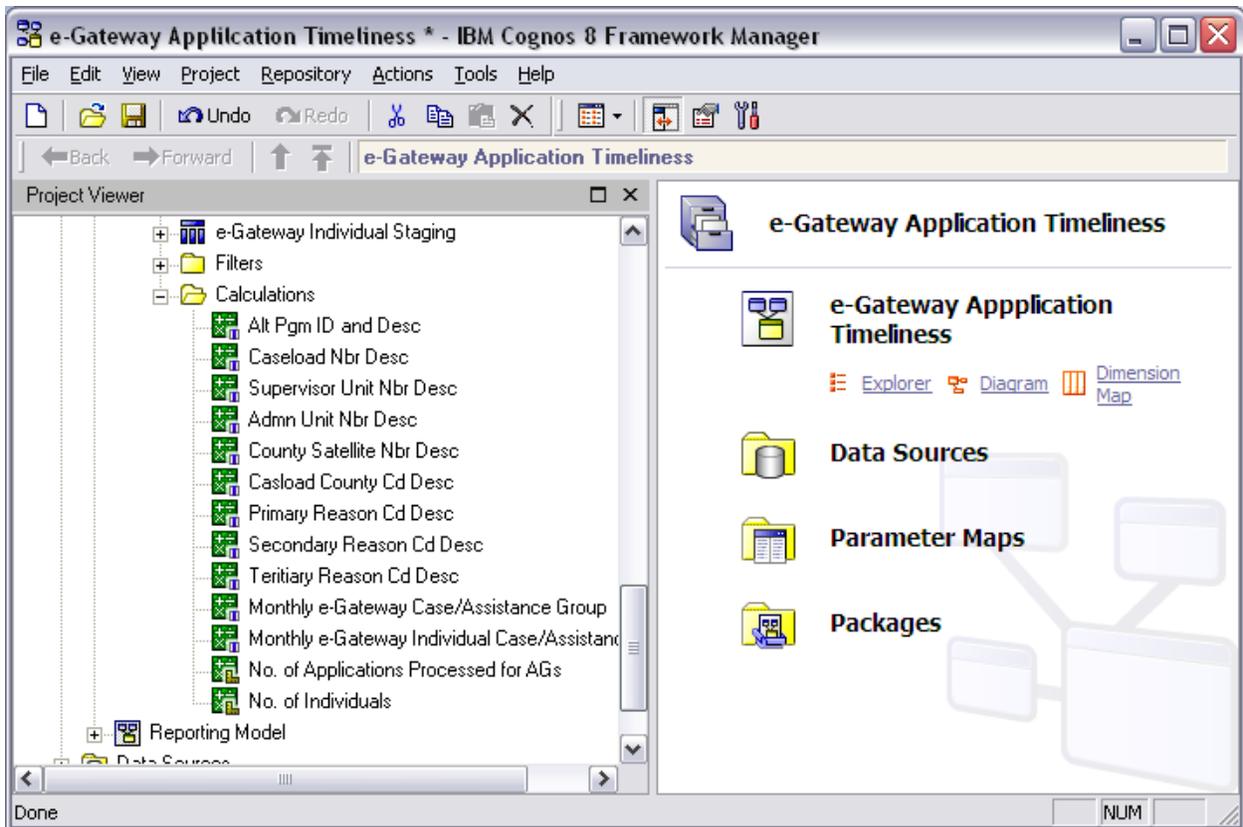
- Logical model with business names - Model query subjects created in the Logical Model using the tables in the Physical Model.



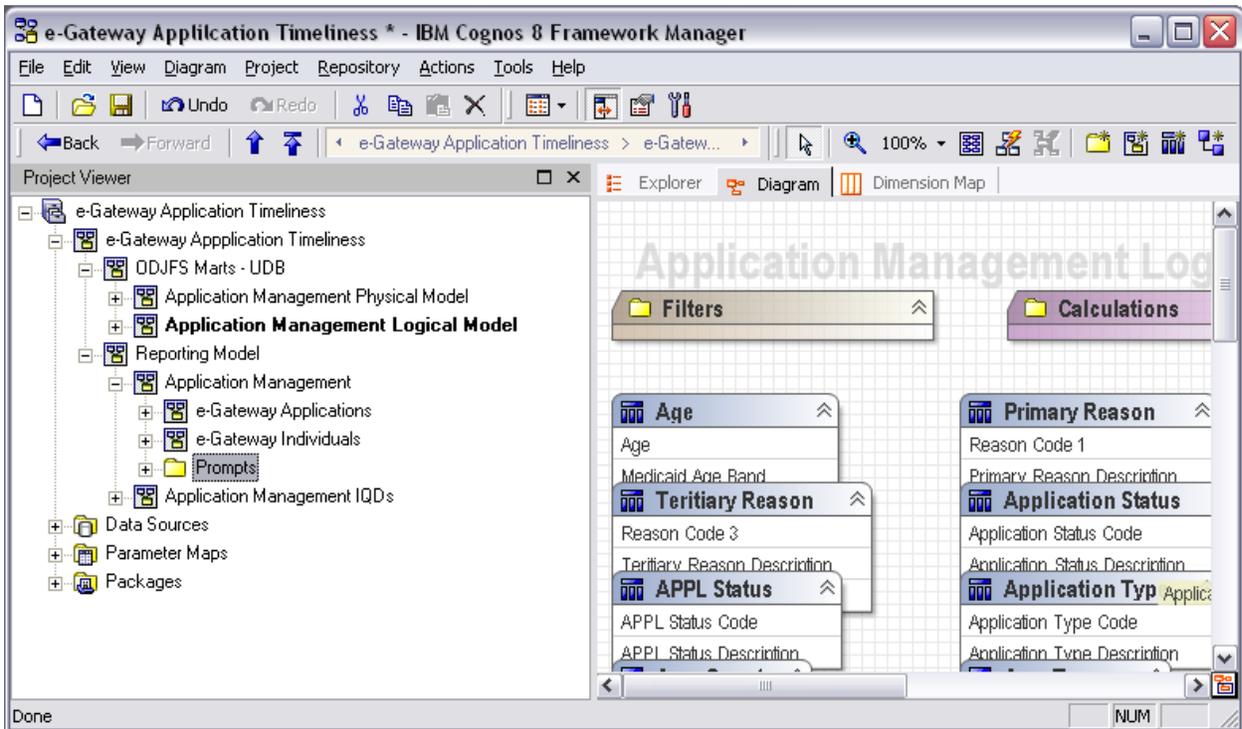
- All Filters created and organized in a folder.



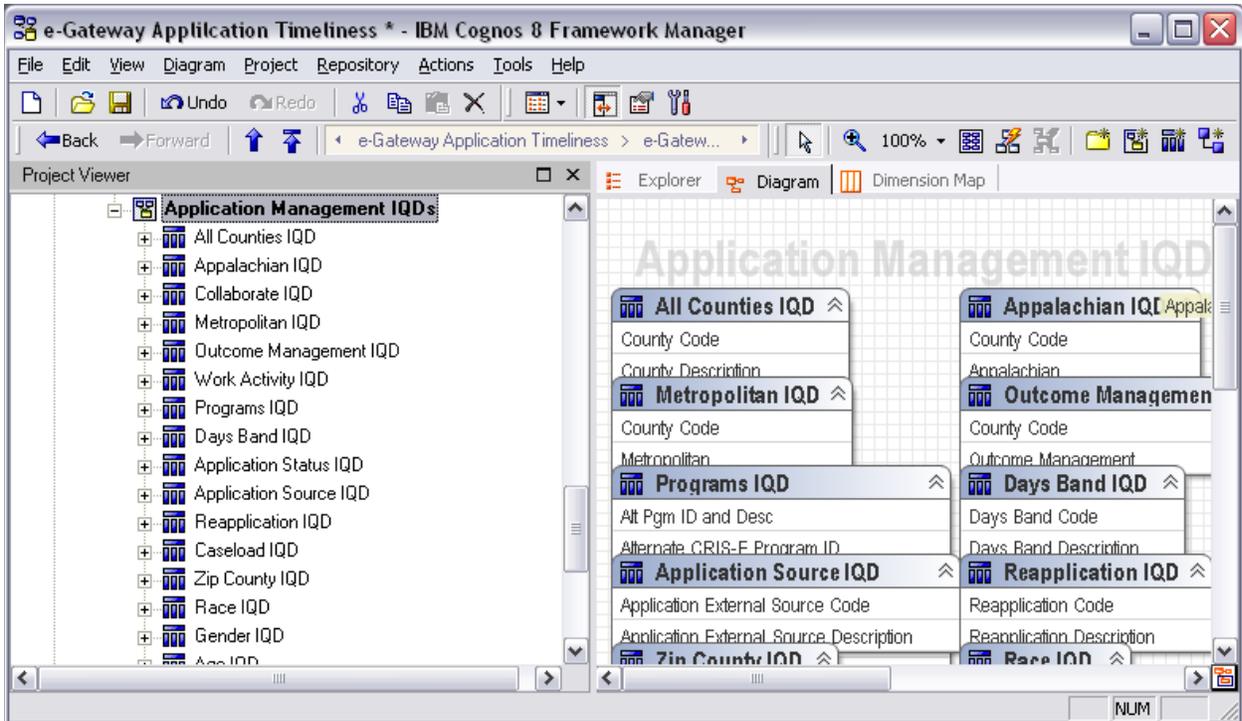
- All Calculations created and organized in a folder.



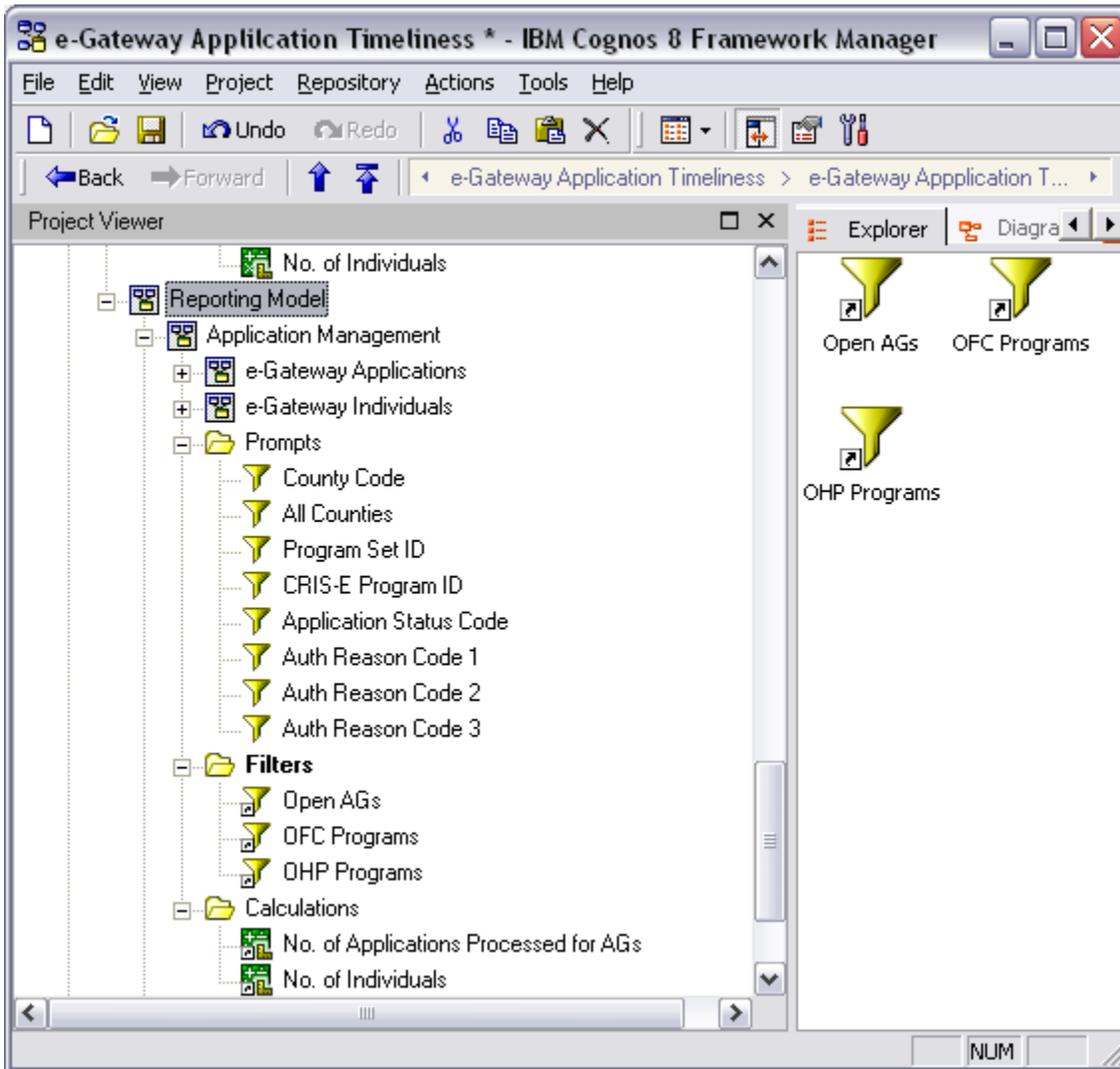
- Reporting model has two views with model query subjects or shortcuts to the existing model query subjects in Logical model.
- A Business view for the Promptable and Drill through reports and IQD View for the cubes.



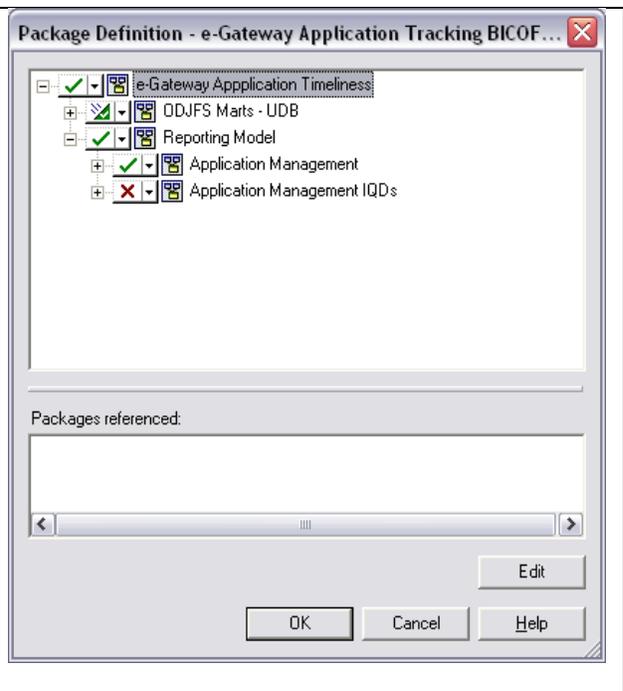
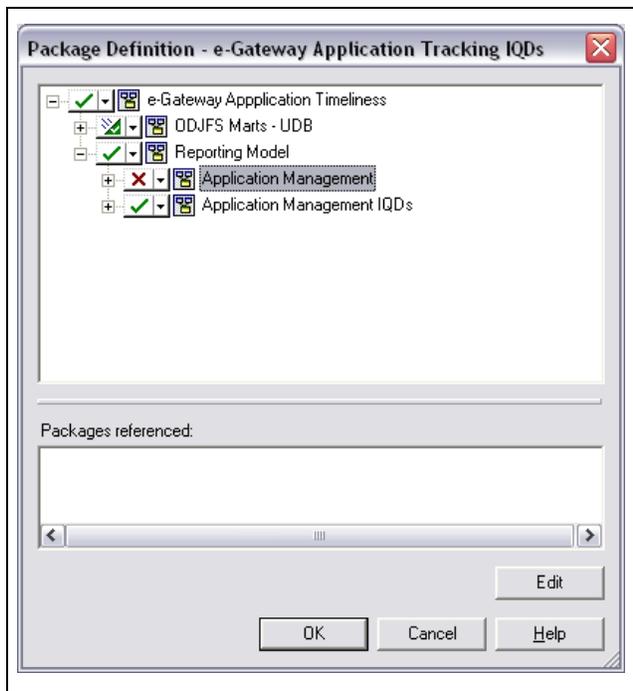
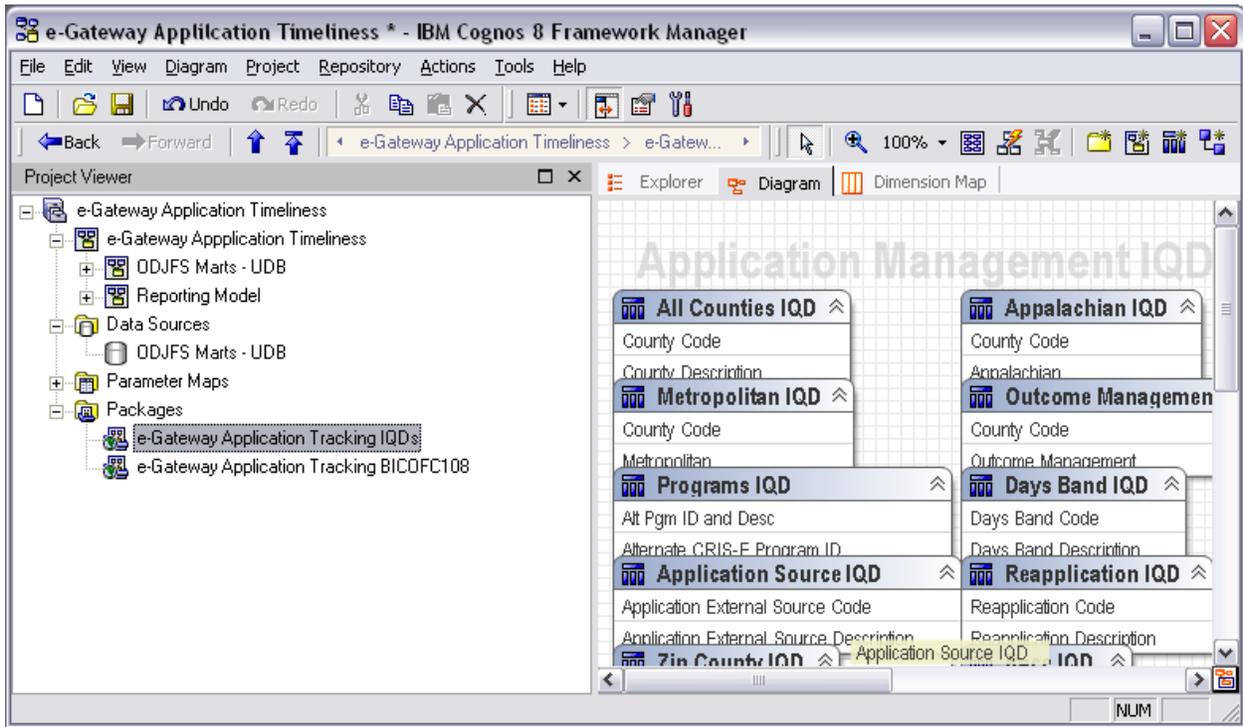
- And an IQD View for the cubes.



- Create Prompts, Filters and Calculations used by the reports in folders in the Business View.



- Create separate packages for the Business View and the IQD views. A standard numbering assigned to the package with Business View.

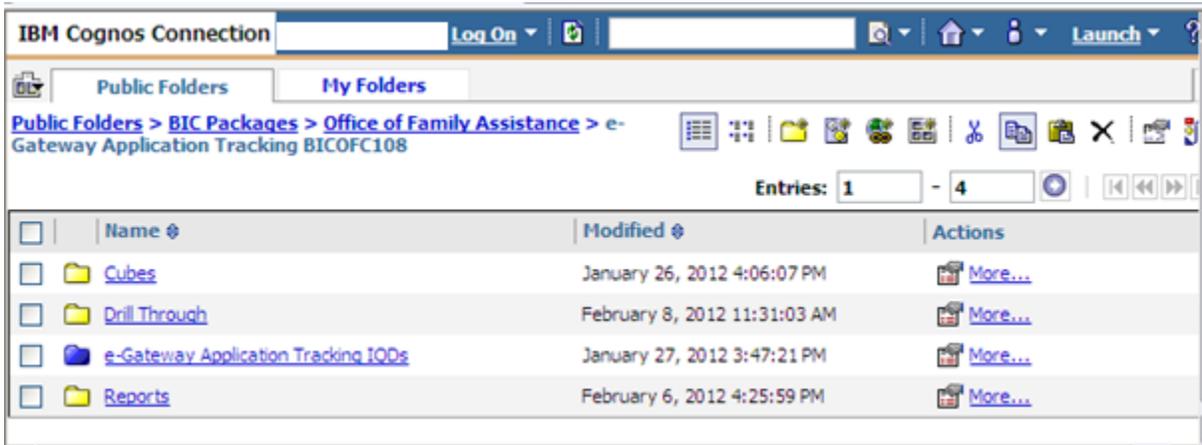


IBM Cognos Connection standards:

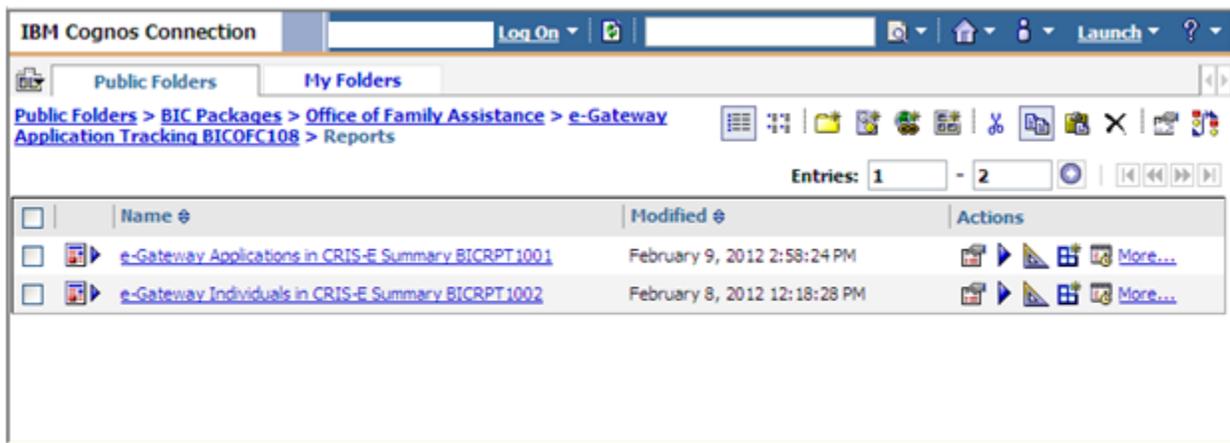
- All packages are organized in Public Folders > BIC Packages > <Office Name> folders



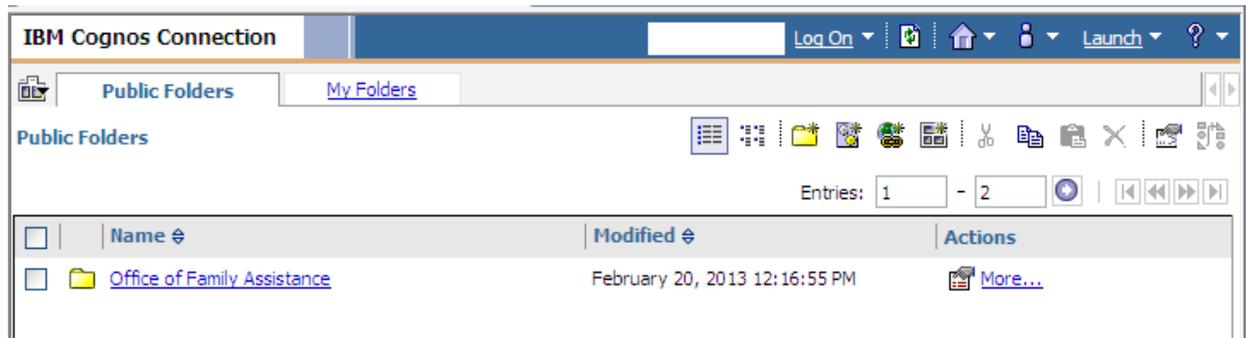
- Each package has folders to hold Cubes, Drill Through Reports, Prompted Reports and IQD packages.



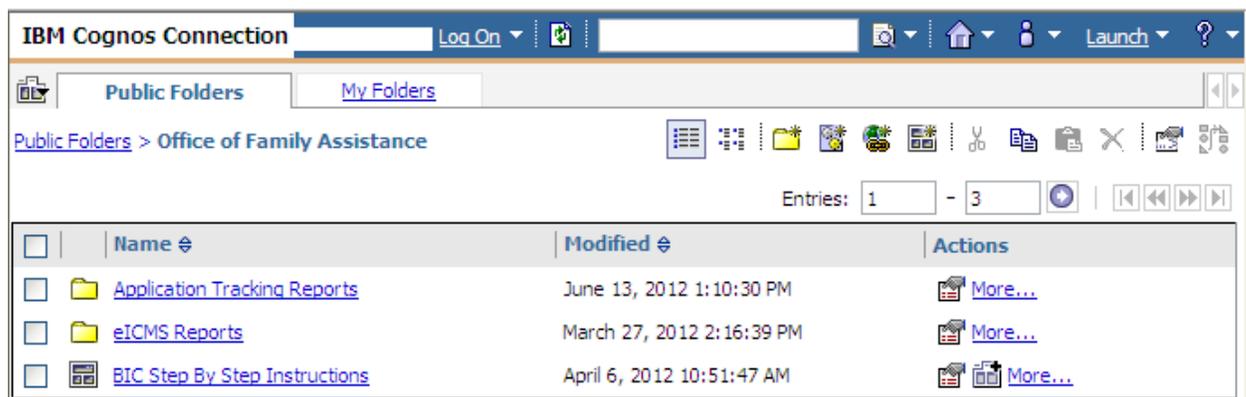
- All reports should have a name a Report ID and defaulted to display in PDF format unless there is a requirement for a different format.



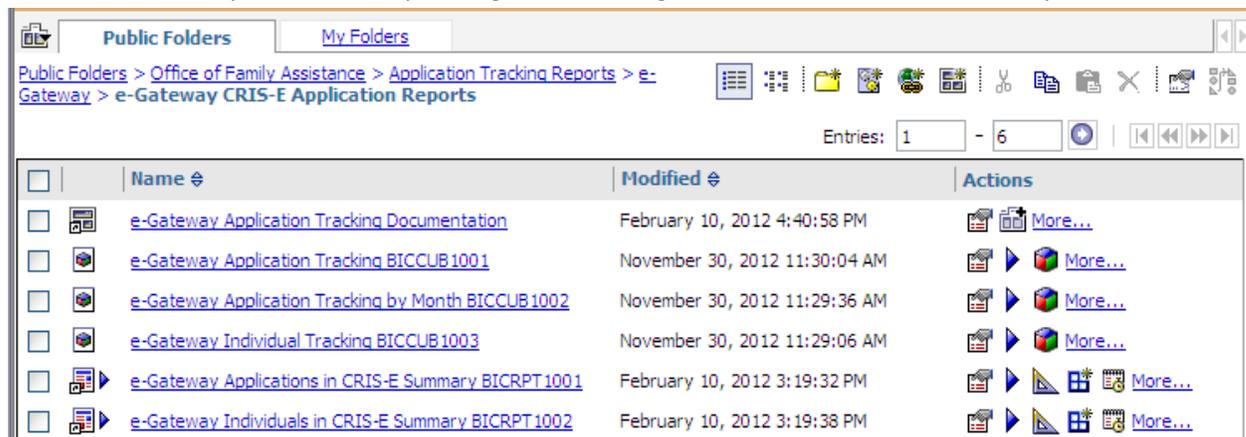
- BIC Packages folder and the folder structure mentioned above is for the developers and administrators only. This folder is hidden from the users.
- Users have access to their Office folders.



- Cubes and Reports are organized in user friendly folders for Subject Areas and Projects with documentation.

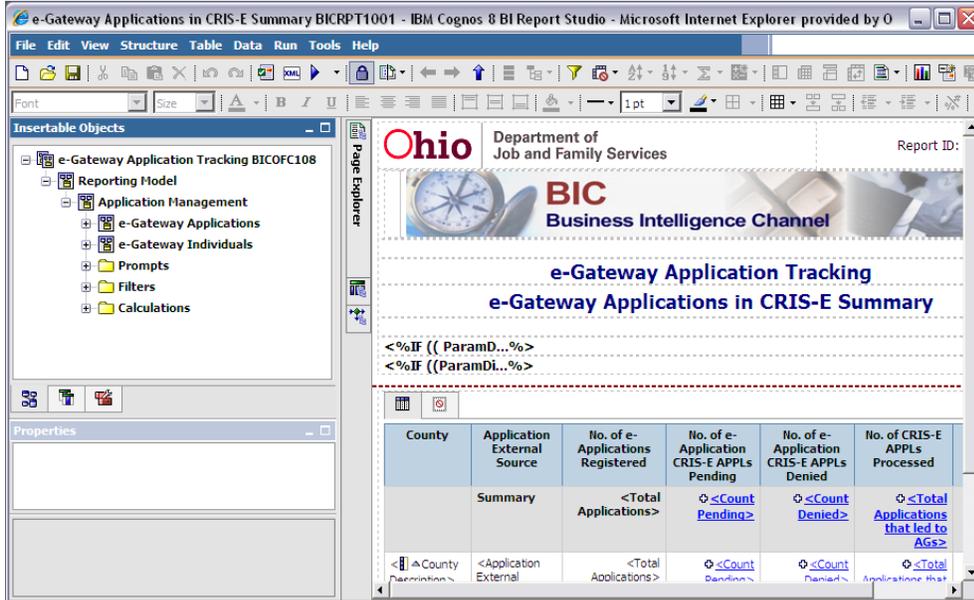


- Cube Views and Report shortcuts pointing to BIC Packages are created with User friendly names.

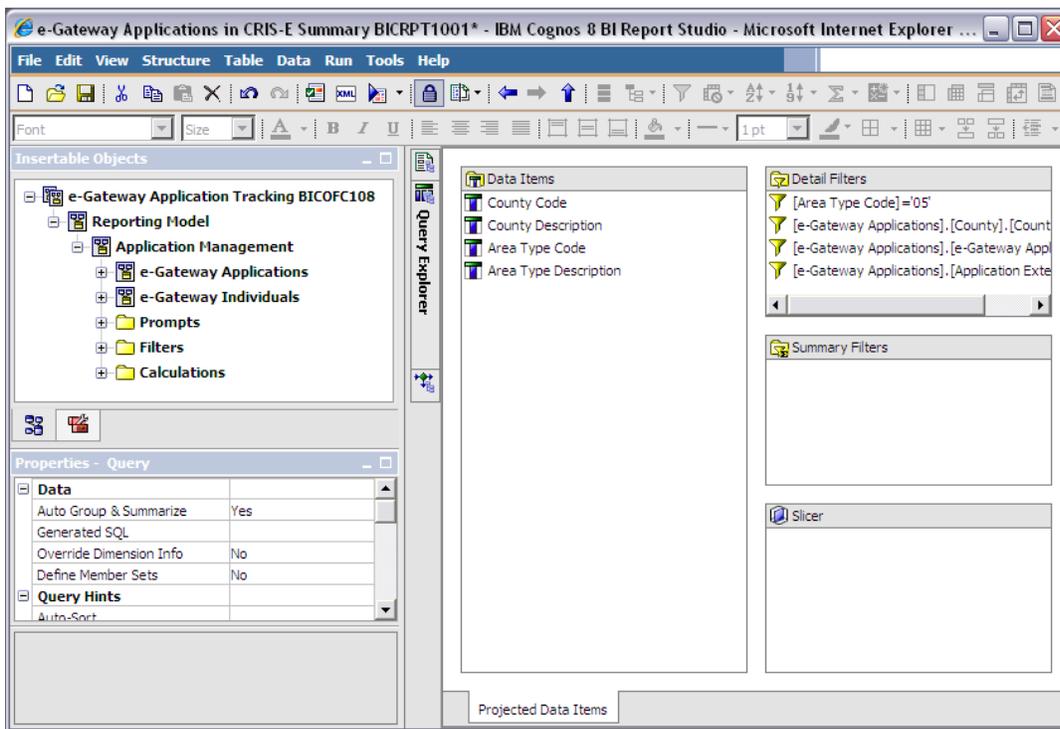


Reporting development standards:

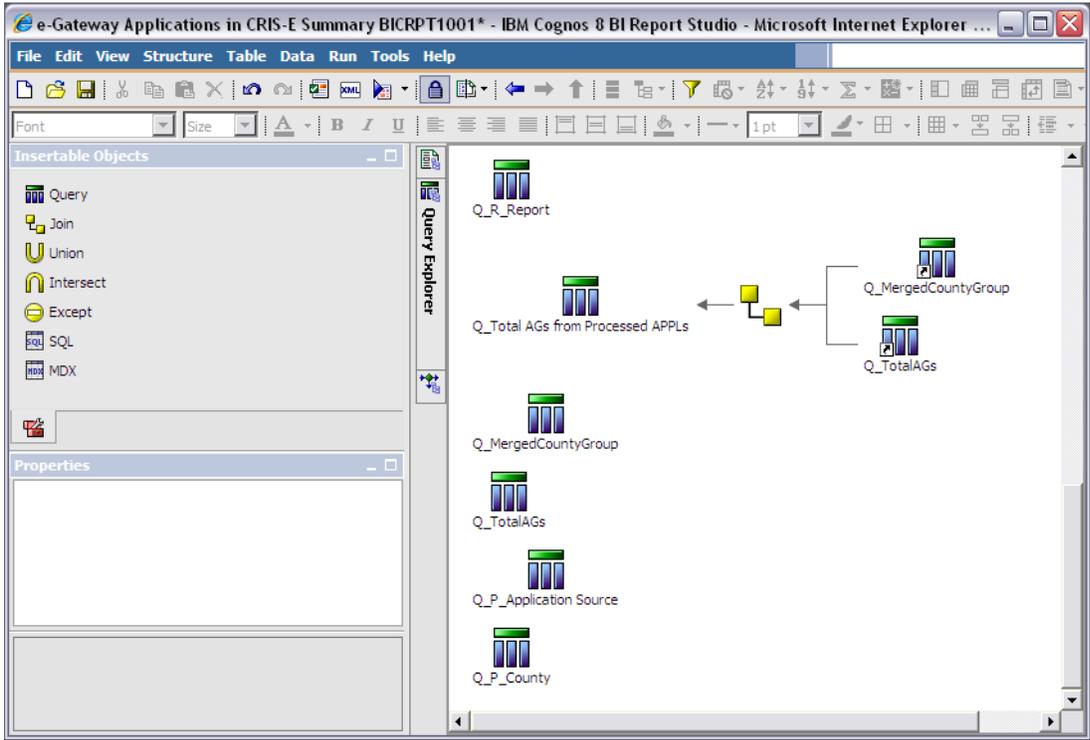
- Reports should always use the FM model per IBM Cognos best practices
- For history reports, tables should be designed to keep track of the history. Do not use Report PDFs archiving for history.



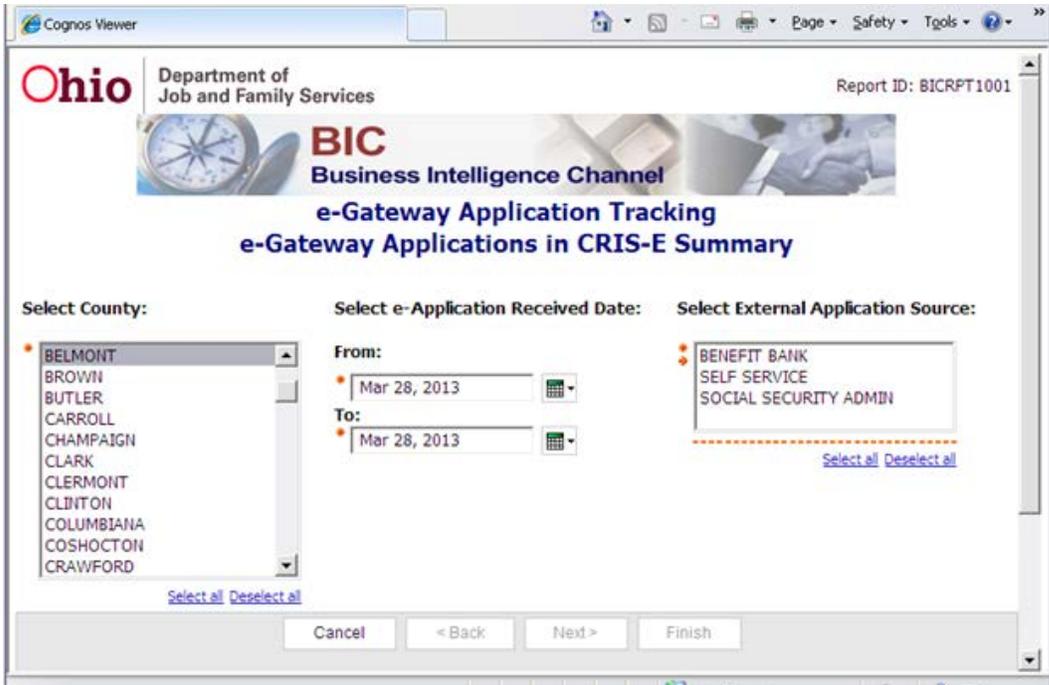
- Filters and calculations from the FM model should be used, necessary filters specific to the report can be created at this level.



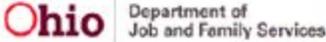
- Do not use custom sql for creating query subjects. One alternate solution is to create custom query subjects in FM model. Another alternate is to create joins at the report level.



- All reports should display the JFS logo in the top left corner, BIC logo centered, Report ID on the top Right corner in all prompt pages and report pages.
- Each report should have a Project Name and the report name in the title with the following format.
- Prompts should always be populated with the dimension tables and not from the Fact tables.



- All reports should display the selected parameters in the title, unless the parameter is a column in the report.
- Date the report run on the bottom left corner, Page Number Centered and Time stamp the report ran on bottom right corner as shown below.




Report ID: BICRPT1001

e-Gateway Application Tracking e-Gateway Applications in CRIS-E Summary

e-Application Received Between Feb 1, 2013 and Feb 28, 2013
Application Source: **BENEFIT BANK, SELF SERVICE**

County	Application External Source	No. of e-Applications Registered	No. of e-Application CRIS-E APPLs Pending	No. of e-Application CRIS-E APPLs Denied	No. of CRIS-E APPLs Processed	No. of AGs from Processed APPLs
Summary		1,125	302	643	180	460
ADAMS	BENEFIT BANK	2	0	1	1	2
	SELF SERVICE	15	3	8	4	13
ALLEN	BENEFIT BANK	14	2	3	9	29
	SELF SERVICE	121	21	60	40	124
ASHLAND	BENEFIT BANK	3	2	1	0	0
	SELF SERVICE	23	15	6	2	5
COLUMBIANA	BENEFIT BANK	6	2	4	4	12
	SELF SERVICE	138	55	46	37	99
COSHOCTON	BENEFIT BANK	1	0	1	1	4
	SELF SERVICE	8	2	1	2	8
CRAWFORD	BENEFIT BANK	5	0	4	1	3
	SELF SERVICE	27	7	15	5	10
CUYAHOGA	BENEFIT BANK	586	258	231	97	187
	SELF SERVICE	1,147	332	247	106	247
FAREF	BENEFIT BANK	1	1	1	0	0

Mar 28, 2013 1 3:04:52 PM

- Display the Summary Totals before the details. All Summary reports should have detail reports to validate the Summary measures.

e-Gateway Application Tracking Assistance Groups Created through e-Gateway

County: Adams
e-Application Received Between Feb 1, 2013 and Feb 28, 2013
Application External Source: **BENEFIT BANK, SELF SERVICE**

County	Application External Source Description	e-Confirmation Number	CRIS-E APPL Number	Case/ Assistance Group	Program	Date Last Updated	Assistance Group Status	e-Application Received Date	No. of Individuals on AG	New Assistance Group	Auth Reason Code 1	Auth Reason Code 2	Auth Reason Code 3
No. of Assistance Groups:		15											
No. of Individuals:		49											
ADAMS	BENEFIT BANK	██████	██████	██████	FOOD STAMPS	2/28/13	OPENED	2/6/13	2	Y	041	091	
		██████	██████	██████	MEDICAID	2/28/13	OPENED	2/6/13	2	Y	091		
	SELF SERVICE	██████	██████	██████	FOOD STAMPS	2/28/13	PENDING	2/7/13	5	Y	354		
		██████	██████	██████	MEDICAID	2/28/13	PENDING	2/7/13	5	Y			
		██████	██████	██████	MEDICAID	2/28/13	PENDING	2/7/13	5	Y			

Supplement Fourteen

JFS BI Reporting Specifications Document

Data Source Name	Data Source Type	Data Source Location	Source DB	DataMart DB
OUC - ERIC	DB2	OUC - ERIC - DB3A	WA50PS	WA55PX

BATCH DEPENDACY	BATCH #
Doesn't exist	NA

FILE DEPENDACY	FILE NAME	BATCH #
Doesn't exist	NA	NA

ETL DEPENDACY	TABLE NAME

FORMATTING CHECK LIST

General Formatting

- 1) Check report JFS Logo, Office and Bureau Name, report number and title, report run date and any param
- 2) Check the header font size and Footer Font Size
- 3) All the reports should have the same font type and size how ever applicable
- 4) List and Crosstab header and background color . Color code for background color would be BF D2 E2
- 5) "User Id:", "Page Number Of Page Count" in the footer
- 6) Report Page Setup. Based on the report, either landscape or Portrait. Print paper size would be letter (11
- 7) Alternate background colors for Conditional formatting if it applies for any of the reports.
- 8) Alternate background color for conditional formatting would be "Grey".
- 9) Check for the ****End Of Report**** text.

Data Formatting

Data Types	Alignment
TEXT	LEFT
DATE	CENTER
TIME	CENTER
PERCENTAGE	RIGHT
AVERAGE	RIGHT
COUNT	RIGHT
AMOUNT	RIGHT

Formatting of Query Items

DATE	MM/DD/YYYY
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NEGATIVE AMOUNTS	()
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Font Sizes

Page Headers

REPORT HEADING 1	Normal Bold 16 Point Arial
REPORT HEADING 2	Normal Bold 14 Point Arial
REPORT HEADING 3	Normal Bold 14 Point Arial
OTHER HEADERS	Normal Bold 10 Point Arial

Page Footers

REPORT FOOTER 1	Normal 10 Point Arial
REPORT FOOTER 2	Normal 10 Point Arial

List

LIST COLUMN TITLES	Normal Bold 10 Point Arial
LIST BODY	Normal 9 Point Arial
SUB TOTALS	Normal Bold 9 Point Arial
TOTALS	Normal Bold 9 Point Arial

Crosstab

CROSSTAB NODE MEMBER	Bold 10pt Arial
CROSSTAB INTERSECTION MEASURE	Normal Normal 9 pt Arial
CROSSTAB INTERSECTION MEASURE TOTAL	Normal Normal 10 pt Arial

eters the report uses

X 8.5)