



# USA Staffing

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## USA Staffing Reporting & Analytics

Reporting and Analytics Workgroup Meeting

*July 6, 2021*

*Created by the OPM Federal Staffing Center*

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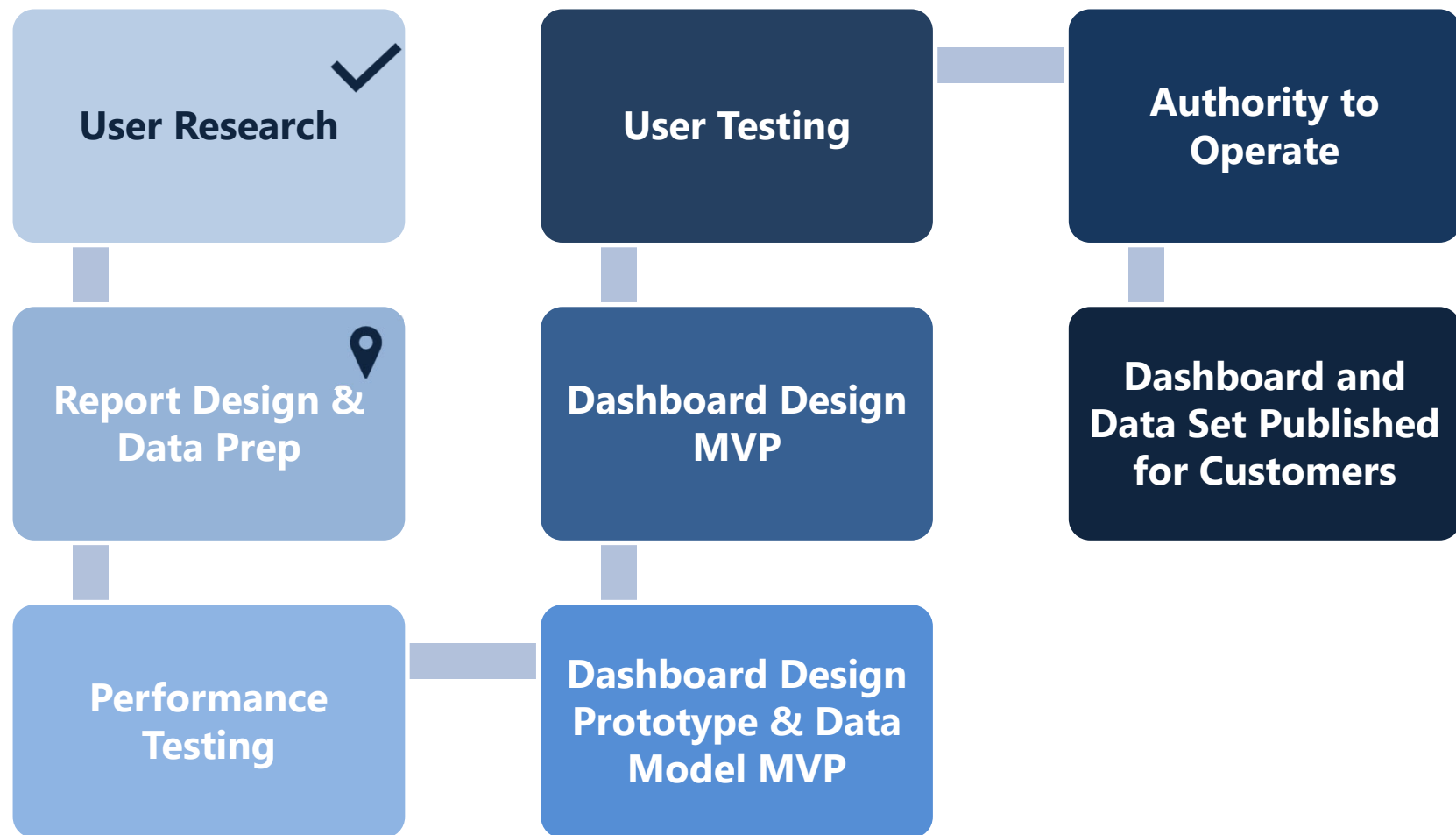
# Agenda

- **Program Updates**
  - Power BI Update
  - Cognos Performance Metrics
  - Reporting User Customer Satisfaction Survey
  - Cognos Training Program
  - Retiring New Hire (End of Day)
  - User License Reporting
- **Modifications to Reports and Data Models**
  - Reports
  - Data Models
- **Cognos Tip**
  - Maintaining the ability to sort and filter in Excel with grouped data
- **Open Demo and Q&A**



# Power BI Implementation Milestones

Minimum Viable Product (MVP) 1: A data set and dashboard published in a shared workspace available to customers.





# Power BI Implementation Milestones

## User Research Activities ✓

- ✓ User research interviews and focus groups
- ✓ Summarize user research
- ✓ Analyze report usage data

## Report Design and Data Prep 📍

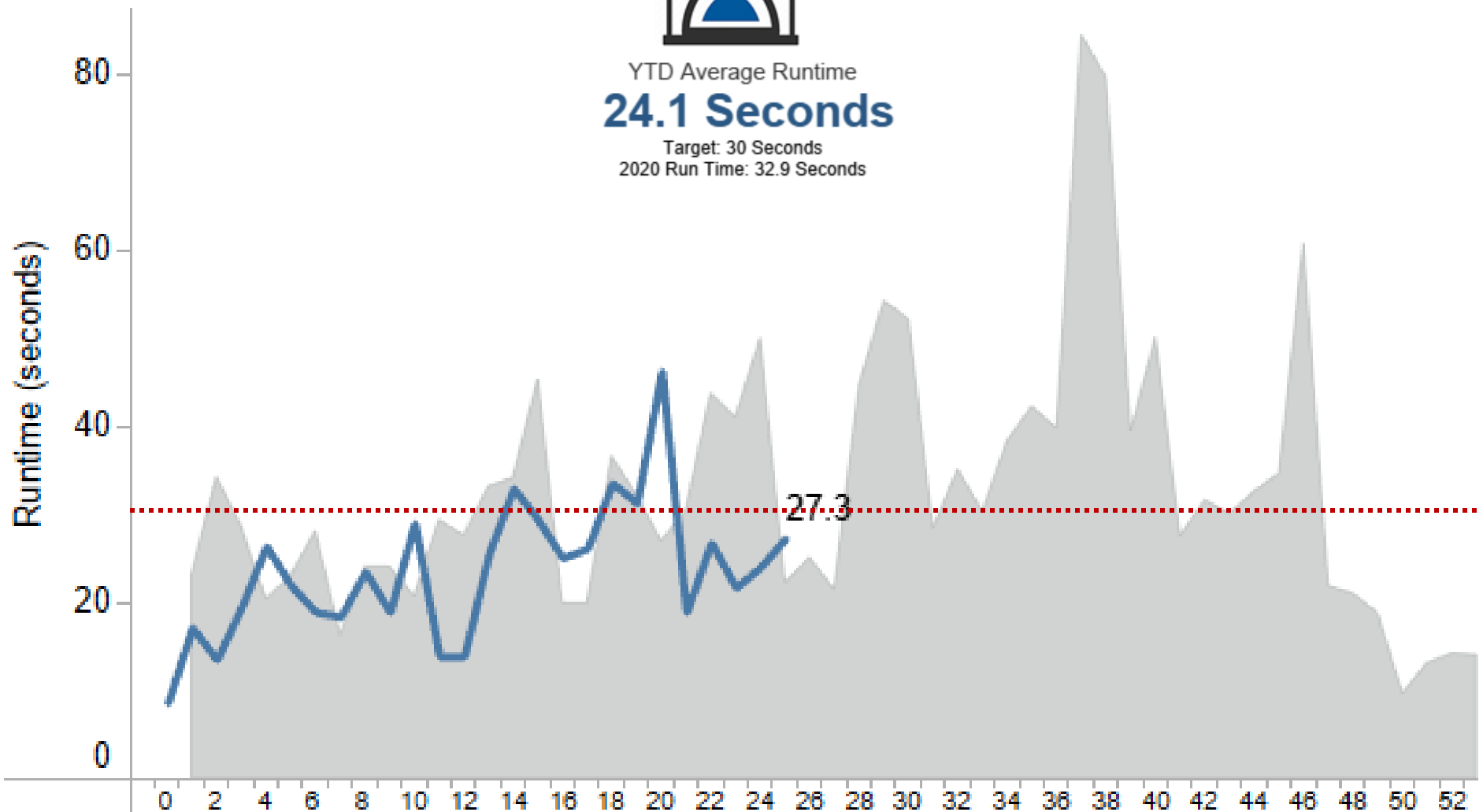
- Create report design assets (e.g., data visualization guide)
- Evaluate current reports to identify common use cases for standard report development
- Identify core features to meet the needs of the majority of report consumers
- Collaborate with developers to define data model requirements
- Dashboard/report prototyping
- Security model development



# Cognos Performance Metrics



YTD Average Runtime  
**24.1 Seconds**  
Target: 30 Seconds  
2020 Run Time: 32.9 Seconds



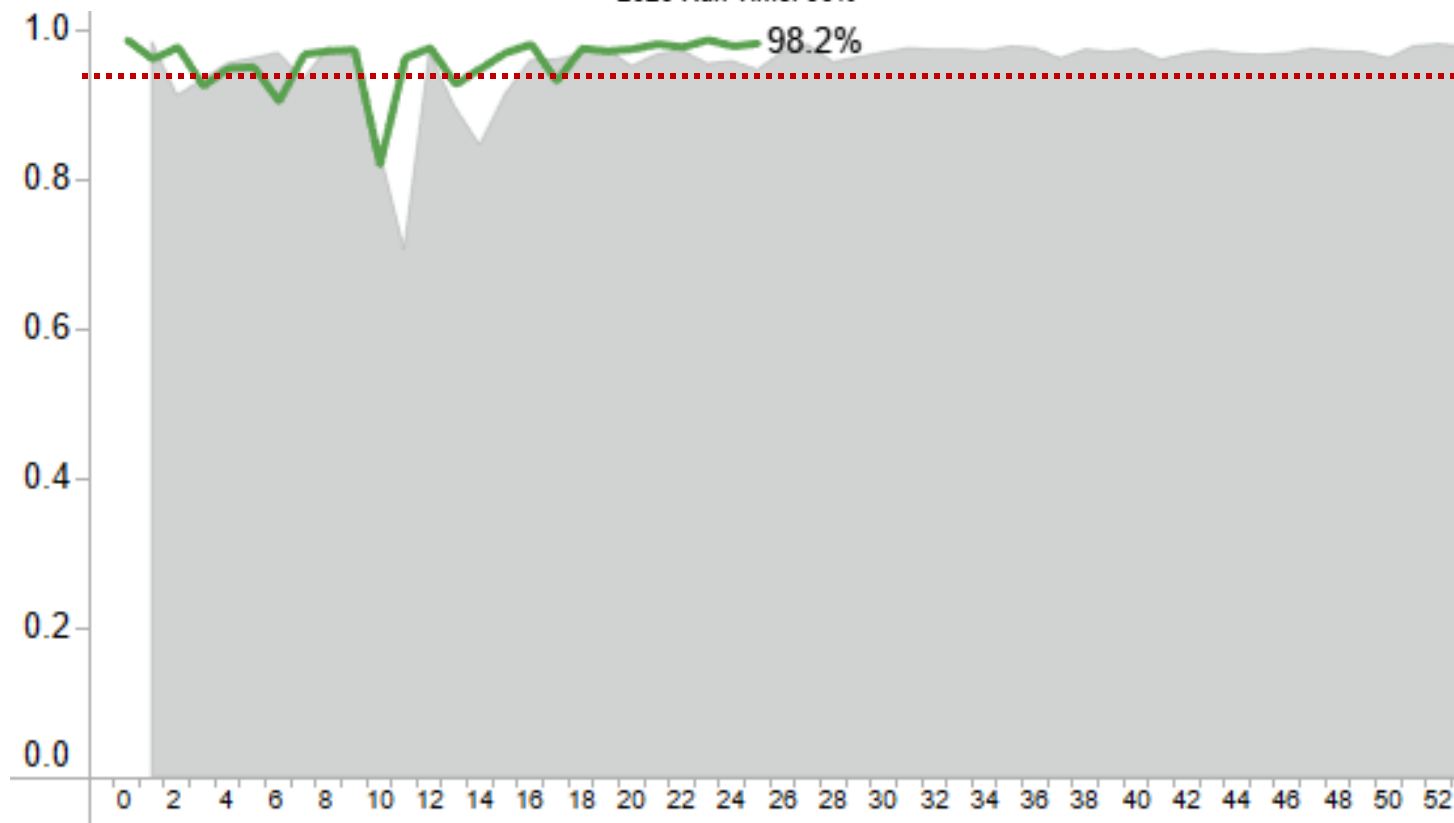


YTD Success Rate

**95.9%**

Target: 95%

2020 Run Time: 96%

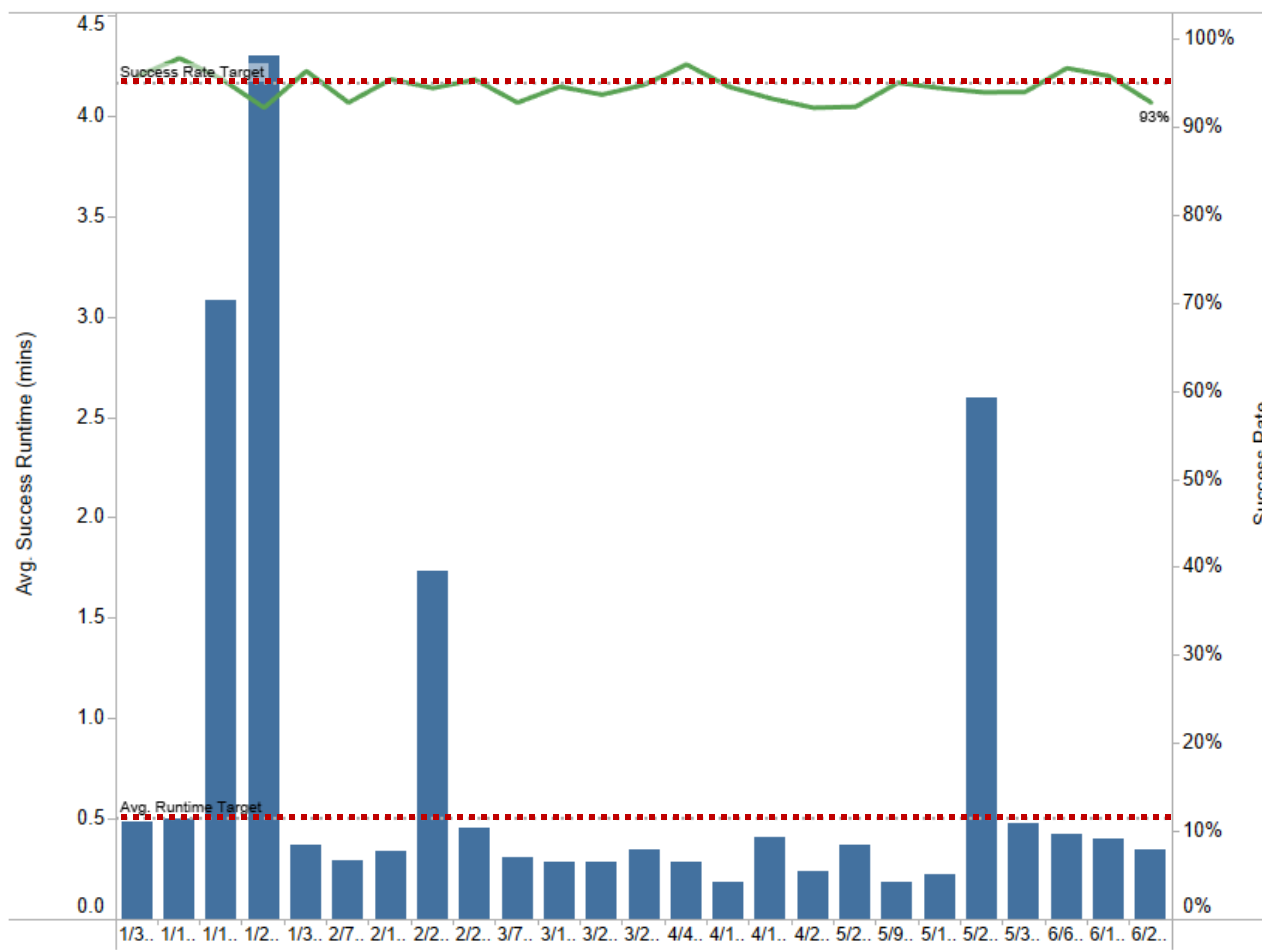




# HDW Standard Report Performance

YTD Average Runtime  
**0.65 Minutes**

YTD Success Rate  
**94%**







# HDW Standard Report Metrics

Report Name	Report Runs	Avg Success Rate	Avg Runtime (mins)
Announcement Status Dashboard	963	97.7%	0.076
Announcement Status Report	1,979	98.2%	0.181
Applicant Dashboard	1,019	92.0%	0.346
Applicant List Report	1,599	92.8%	0.533
Applicant Scores by Assessment Report	193	89.1%	0.090
Application History Report	352	97.7%	0.196
Areas of Waste Report	611	82.8%	1.372
Assessment Content Report	109	93.6%	0.067
Assessment Items and Applicant Responses ..	81	86.3%	0.910
Assessment, Items, and Competency Usage ..	87	98.9%	0.024
Certificate Activity Dashboard	591	98.5%	0.060
Certificate Activity Report	580	97.6%	0.026
Certificate Overview Report	34	100.0%	0.039
Certificate Review Detail Report	173	98.3%	0.042
Certificate Status Dashboard	581	94.3%	0.434
Certificate Status Report	1,043	92.4%	0.366
Declarations Dashboard	405	85.6%	0.848
Delegated Examining Audit Report	165	94.5%	0.129
Delegated Examining Production Activity	79	94.9%	0.024
Delegated Examining Workload Report	23	95.7%	0.054
eOPF Transmission Report	320	89.3%	0.225
New Hire Dashboard	751	95.3%	0.433
New Hire Detail Report	2,013	97.5%	1.136
Production Statistics Dashboard	748	95.3%	0.429
Recruitment Sources Dashboard	205	96.1%	0.130
Recruitment Sources Report	112	93.8%	0.178
Referrals by Certificate Report	103	100.0%	0.109
Request Overview Dashboard	402	95.0%	2.474
Request Overview Report	582	93.3%	3.338
Request Vacancy Information	125	98.4%	0.014
Selectees without Requests or Offers	86	92.3%	0.066
Selectees without Requests Report	13	94.4%	2.221
Staffing Process Tracking Report	645	75.0%	0.473
Tasks by Staffing Number	8	98.3%	0.079
USA Hire Tracking Report	464	94.3%	2.375
Vacancy Overview Dashboard	866	91.5%	0.058
Vacancy Overview Report	1,442		



## Reporting User Satisfaction Survey

A new **bi-annual customer satisfaction survey** will was launched in April 2021.

This new survey is designed to gather in-depth and comprehensive feedback about products and services provided by the USA Staffing Reporting teams, including:

- Business Intelligence tool
- Data available for reporting
- Standard reports
- Interconnections
- Workgroups
- Training
- Support

640

Survey Recipients

146

Completed Surveys

23%

Completion Percent

11

Agencies

58

Organizations



# Reporting User Satisfaction Survey

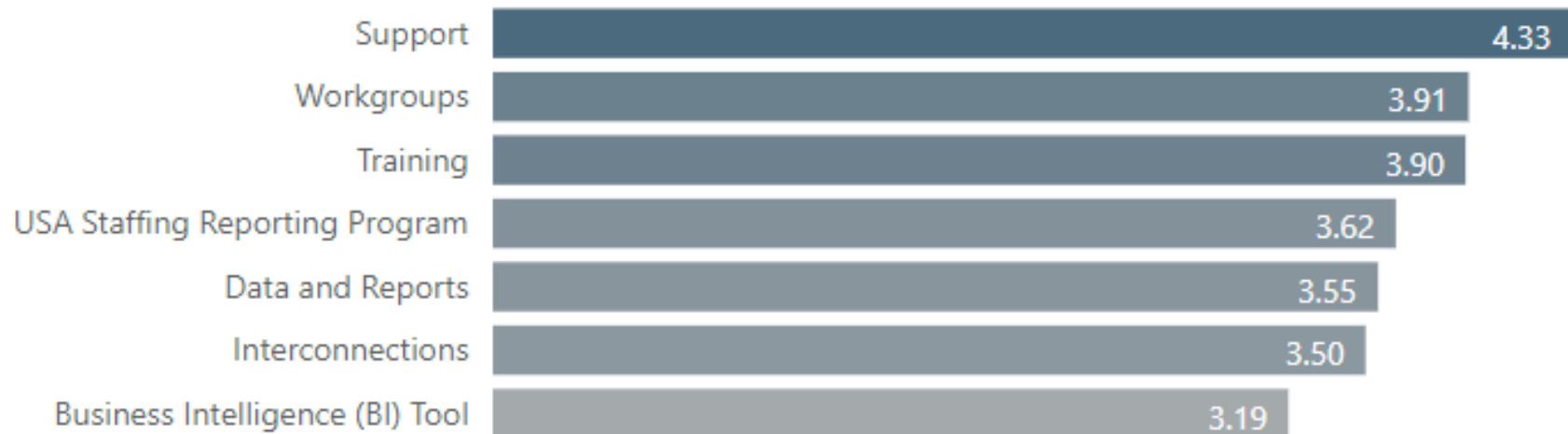
70%

Positive Responses

3.8

Avg Response to All Questions  
1 = Most Negative; 5 = Most Positive

## Average Rating Survey Section





# Reporting User Satisfaction Survey

## Top Five Highest Rated Questions

The USA Staffing Reporting team conducts business in a professional manner.

4.49

The USA Staffing Reporting team is knowledgeable

4.43

The USA Staffing Reporting team provides timely service.

4.33

The USA Staffing Reporting team provides consistent and reliable service.

4.36

How satisfied are you with the timeliness of the resolution or responses provided?

4.29



# Reporting User Satisfaction Survey

## Bottom Five Lowest Rated Questions

It is easy to navigate the library of standard reports to find what I need.

3.28

The BI tool is easy to navigate to locate the reports and data I need.

3.23

Considering everything, how satisfied are you with the BI Tool that supports USA Staffing reporting?

3.24

It is easy to set up an interconnection with USA Staffing.

3.10

The BI tool is easy to use to create or modify reports.

2.92

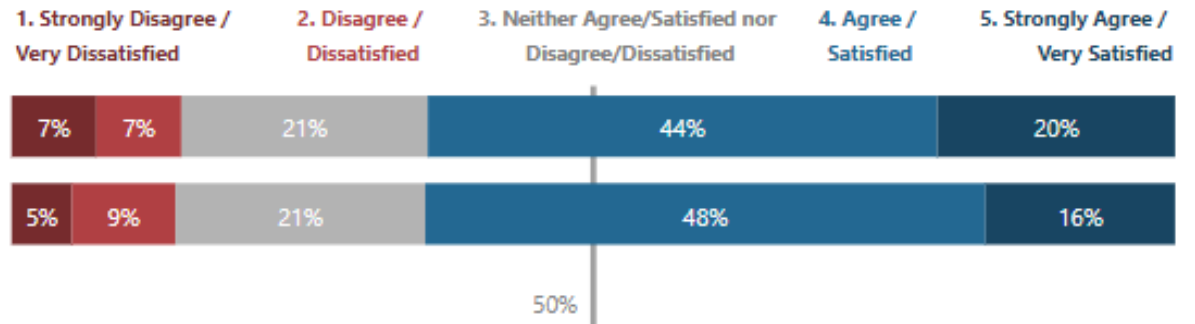


# Reporting User Satisfaction Survey

## USAS Program Questions

I would recommend USA Staffing reporting products and services to other government organizations.

Considering all your experiences with USA Staffing Reporting, how satisfied are you with reporting products and services?



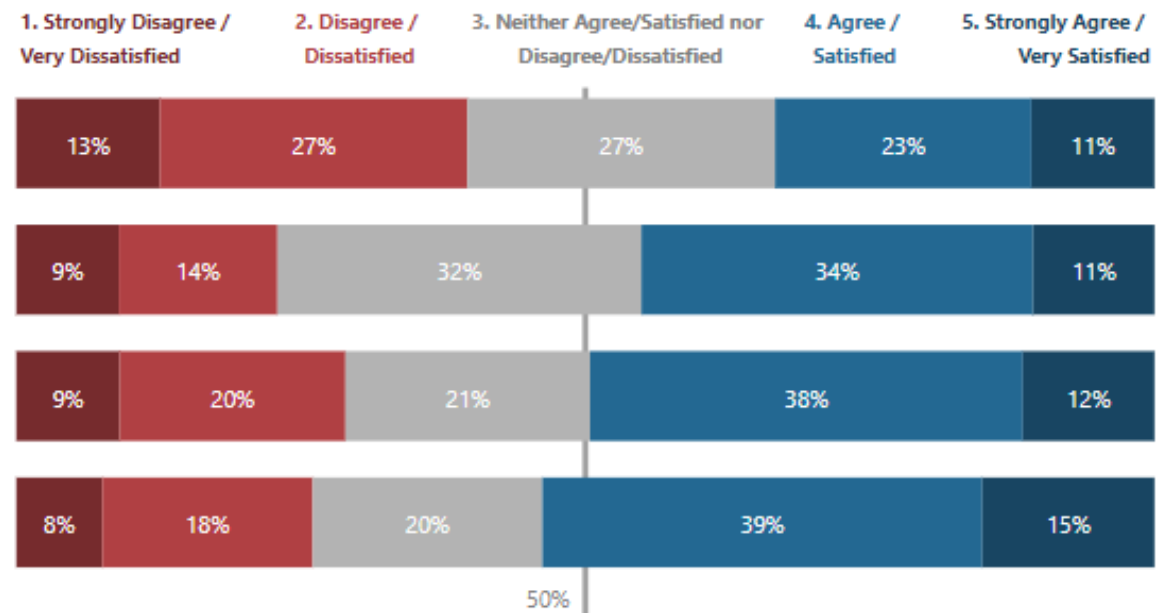
## BI Tool Questions

The BI tool is easy to use to create or modify reports.

Considering everything, how satisfied are you with the BI Tool that supports USA Staffing reporting?

The BI tool is easy to navigate to locate the reports and data I need.

The BI tool is easy to use to run reports.





# Reporting User Satisfaction Survey

## Data and Reports Questions

It is easy to navigate the library of standard reports to find what I need.

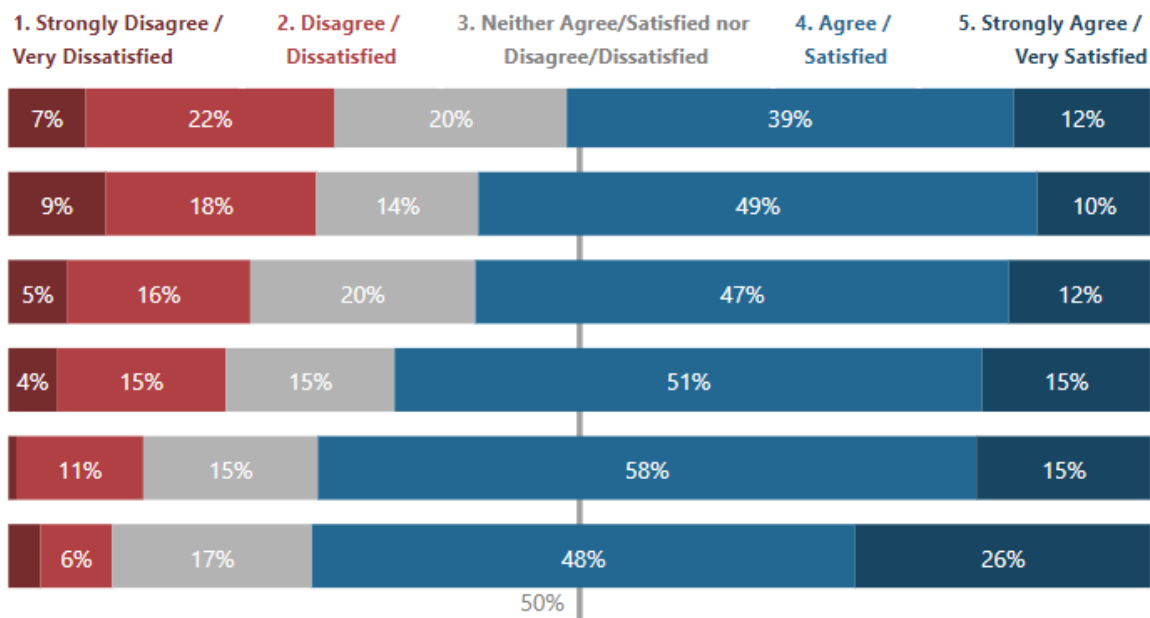
How satisfied are you with the typical amount of time it takes for reports you run to complete?

The library of standard reports managed by the USA Staffing Reporting team provides the information I need to do my job.

How satisfied are you with the success rate of reports you run?

The data I need to report on is available through USA Staffing Reporting.

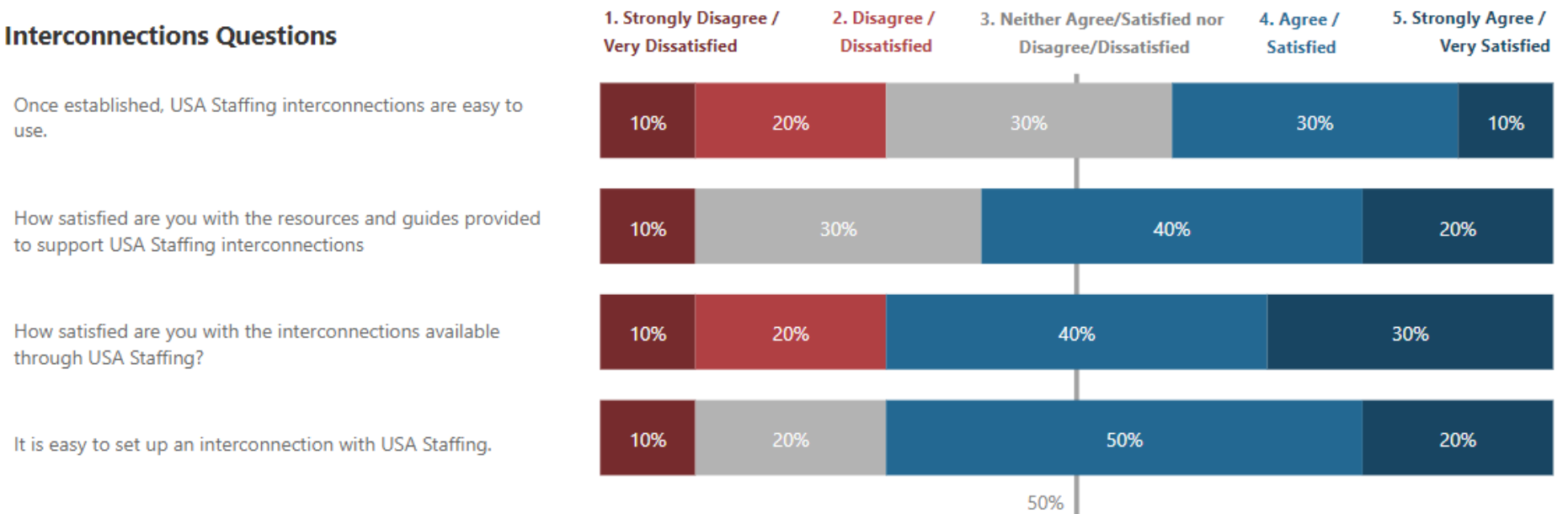
I have confidence that the data provided through USA Staffing reports is accurate.





# Reporting User Satisfaction Survey

## Interconnections Questions







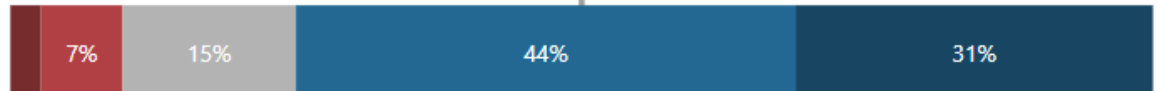
# Reporting User Satisfaction Survey

## Workgroups & Training Questions

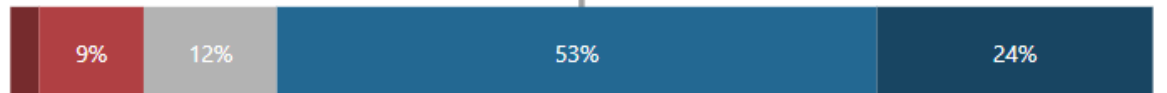
How satisfied are you with the Applicant Flow Data Workgroup?



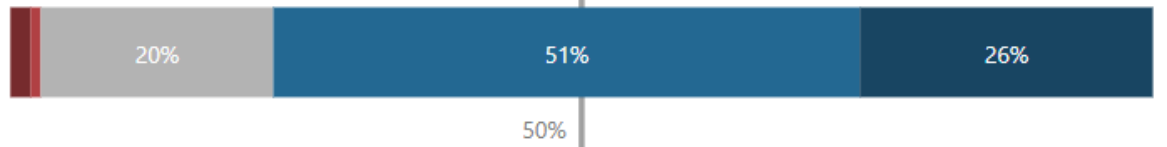
How satisfied are you with the trainings offered by the USA Staffing Reporting team?



How satisfied are you with the resources, guides, and/or job aids that have been provided by the USA Staffing Reporting team?



How satisfied are you with the Reporting and Analytics Workgroup?





# Reporting User Satisfaction Survey

## Support Questions

The resolution or responses provided fully addressed the issue(s) I encountered.

Considering everything, how satisfied are you with the reporting support provided?

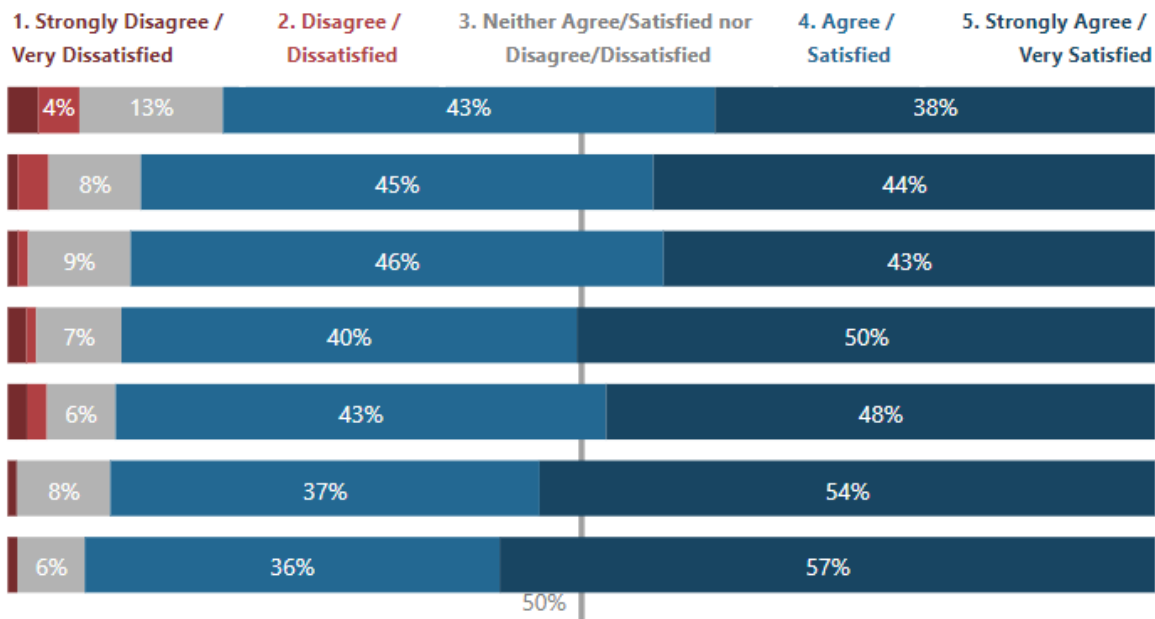
How satisfied are you with the timeliness of the resolution or responses provided?

The USA Staffing Reporting team provides consistent and reliable service.

The USA Staffing Reporting team provides timely service.

The USA Staffing Reporting team is knowledgeable

The USA Staffing Reporting team conducts business in a professional manner.





# Reporting User Satisfaction Survey

## Selected Comments (Trends) – What does USA Staffing do well?

- "I am especially grateful to the reporting team for providing above-and-beyond support through the years. We can always count on them whenever we need additional/personal assistance."
- "Great team that cares a lot about providing a quality tool for reporting and analytics."
- "I think the workgroups are helpful."
- "The advanced author forum is a great tool if you need a report and aren't sure how to create it."
- "...has been very satisfied with the reporting out of USAS. We are looking forward to leveraging the APIs as they roll out and utilize all interconnections available. The fact that you all offer COGNOS training exceeds my expectations. We have used this for new users on our reporting team."
- "The Hiring Data Warehouse is amazing. Very much appreciated the time and effort that went into creating that."



## Reporting User Satisfaction Survey

### **Selected Comments (Trends) – What can USA Staffing do to improve?**

- “Locating reports is the biggest struggle and identifying which reports show what data.”
- “There seemed to be a step missing between the Consumer Reports Training and the Author reports training.”
- “Cognos is not intuitive. I think it would work if I was using it more often, but having gone to training last year and not trying to create custom reports is a bit difficult and slow. I am looking forward to the new BI tool.”
- “Even with HDW, performance still needs to be improved.”
- “Cognos occasionally stops working reliably every 6-8 weeks, and we have to report the issue.”
- “...be more descriptive about the information reports are generating. Creating reports is difficult when trying to generate certain outcomes but not able to determine what data elements are pulling the data and how they’re interconnected.”



# Cognos Training Program

## Report Consumer Training

## Report Author Training

## Advanced Author Forum

<b>Who?</b>	• New USA Staffing reports users	• New report authors	• Experienced report authors
<b>What?</b>	• How to navigate to and run reports	• How to get started building reports	• Open forum for authors to ask questions
<b>Time?</b>	• ½ day	• 1 ½ days	• 1 hour
<b>When?</b>	One session per month, alternating between each Report Consumer Training and Report Author Training		• The first Thursday of each month at 11:00 AM EDT
<b>How?</b>	Contact your USA Staffing Account Manager to sign-up.		• All report authors are welcome. Questions can be submitted in advance



# Cognos Training Dates

## Report Consumer Training

## Report Author Training

## Advanced Author Forum

### Dates

Tuesday, July 13  
12:30 – 4:30 PM EDT

Tuesday, September 14  
12:30 – 4:30 PM EDT

Tuesday, November 16  
12:30 – 4:30 PM EDT

Tuesday, August 17  
10:00 AM – 4:00 PM EDT

+

Wednesday, August 18  
10:00 AM – 3:00 PM EDT

Tuesday, October 12  
10:00 AM – 4:00 PM EDT

+

Wednesday, October 13  
10:00 AM – 3:00 PM EDT

Thursday, August 5  
11:00 AM – 12:00 PM EDT

Thursday, September 2  
11:00 AM – 12:00 PM EDT

Thursday, October 7  
11:00 AM – 12:00 PM EDT

Thursday, November 4  
11:00 AM – 12:00 PM EDT

### How to Register

Contact your USA Staffing Account Manager.

No registration required.  
Questions can be submitted in advance.



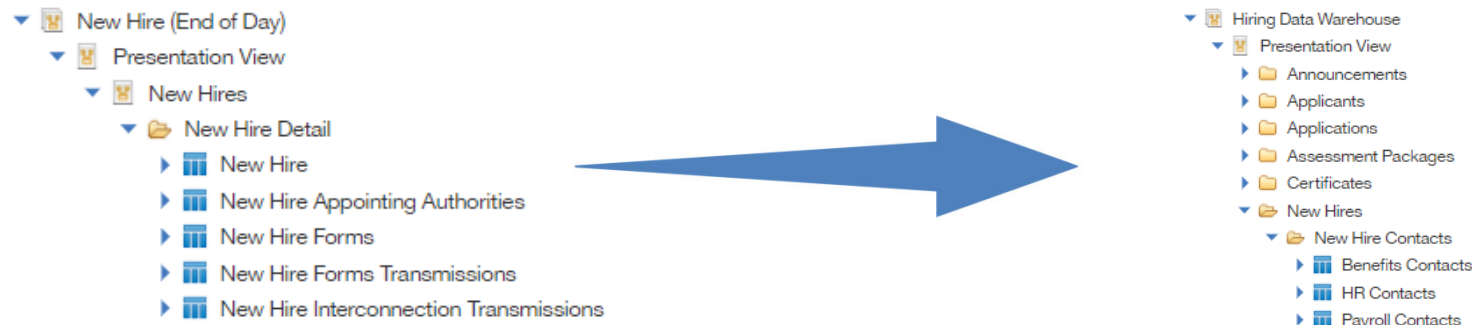
## Retiring New Hire (End of Day)

The following data items in New Hire (End of Day) are **planned for HDW** but are **still in development**.

### Fields in New Hire (End of Day) that are in development for HDW:

- New Hire Form Status

Run the Cognos Reports List report (selecting New Hire (End of Day) in the prompt) to obtain a list of reports for your office/organization.



There are over 300 custom reports using New Hire (End of Day). Please review your reports and if there is a corresponding report using the Hiring Data Warehouse, retire/delete your New Hire (End of Day) reports. Contact [USAStaffingData@opm.gov](mailto:USAStaffingData@opm.gov) or submit a HD ticket if you need assistance.



# User License Reporting Support

The **new User License** data package **is now available in Cognos**, and **Staffing Analytics will be retired** following the transition of existing reports to the new data package.

## Transition Support

**Standard Reports** – current standard User License reports will be created to meet the needs met by the existing standard reports.

### Custom Reports –

- USA Staffing Reporting teams are analyzing all existing custom reports that use Staffing Analytics and that have been run at least 5 times in the last year.
- Custom reports will be analyzed to develop requirements for new standard reports to meet the needs met by the custom reports.

**Information Sharing** – once available in Cognos, information about the new User License will be shared at workgroup meetings and any necessary job aids will be posted on the USA Staffing Resource Center.

### Retirement –

- Current standard reports will be retired upon delivery of new standard reports.
- Current custom reports will be retired upon confirmation that the reporting need is met by a report using the new User License data package.
- The Staffing Analytics package will be retired following retirement of all reports that use it as a data source.





# Modifications to Reports and Data Models

**Sprint 65 deployed to Production on June 9<sup>th</sup>**

**Sprint 1 deployed to Production on June 23<sup>rd</sup>**

**Sprint 2 will be deployed to Production on July 7<sup>th</sup>**

\*The data teams moved to a new workload tracking system, which restarted the sprint numbers.



# HDW Reports Library

**HDW standard reports have been organized into folders** based on the major topic area.



## Announcement

- Announcement Status Dashboard
- Announcement Status Report



## Application

- Applicant Dashboard
- Applicant List Report
- Application History Report
- Declinations Dashboard



## Assessment

- Applicant Scores by Assessment Report
- Assessment Content Report
- Assessment Items and Applicant Responses Report
- Assessment, Items, and Competency Usage Report



## Certificate

- Certificate Activity Dashboard
- Certificate Activity Report
- Certificate Overview Report
- Certificate Review Detail Report
- Certificate Status Dashboard
- Certificate Status Report
- Referrals by Certificate Report
- Selectees without Requests or Offers



# HDW Reports Library



## Delegated Examining

- Delegated Examining Audit Report
- Delegated Examining Production Activity
- Delegated Examining Workload Report



## New Hire

- eOPF Transmission Report
- New Hire Dashboard
- New Hire Detail Report
- New Hire Interconnection Transmission Report



## Production Metrics

- Areas of Waste Report
- Production Statistics Report



## Request

- Request Overview Dashboard
- Request Overview Report
- Request Vacancy Information
- Staffing Process Tracking Report



## Task

- Active and Pending Tasks Report
- Tasks by Staffing Number



# HDW Reports Library



## Delegated Examining

- Delegated Examining Audit Report
- Delegated Examining Production Activity
- Delegated Examining Workload Report



## New Hire

- eOPF Transmission Report
- New Hire Dashboard
- New Hire Detail Report
- New Hire Interconnection Transmission Report



## Production Metrics

- Areas of Waste Report
- Production Statistics Report



## Request

- Request Overview Dashboard
- Request Overview Report
- Request Vacancy Information
- Staffing Process Tracking Report



## Task

- Active and Pending Tasks Report
- Tasks by Staffing Number



# HDW Reports Library



USA Hire

- USA Hire Tracking Report



Vacancy

- Claimed Reasonable Accommodation Report
- Recruitment Sources Dashboard
- Recruitment Sources Report
- Vacancy Overview Dashboard
- Vacancy Overview Report



# HDW Reports

## New/Modified Reports

### **Active and Pending Tasks Report – deployed June 23<sup>rd</sup>**

The Active and Pending Tasks Report was created. This report provides tabular data displaying pending or active staffing and onboarding tasks by announcement, vacancy, request, and/or new hire number, including the owner and key milestones.

- Team Content > USA Staffing Packages and Folders > Hiring Data Warehouse > Task

### **Areas of Waste – deployed June 9<sup>th</sup>**

The Areas of Waste report was modified. This report provides tabular data to identify potential waste from cancelled vacancies and certificates, unreleased vacancies, certificates without selections, certificate reviews that were recalled, and certificate reviews that are overdue. The report was updated to include an optional prompt for customer and to replace some manually calculated metrics with built-in metrics available in the Hiring Data Warehouse. Additionally, underlying work was done to optimize report performance, including the indexing of some of the queries used by the report.

- Team Content > USA Staffing Packages and Folders > Hiring Data Warehouse > Production Metrics



# HDW Reports

## New/Modified Reports

### **Certificate Activity Dashboard – deployed June 9<sup>th</sup>**

The Certificate Activity Dashboard was modified. This report provides visualizations and tabular data summarizing the number of certificates issued, certificates audited, and selections made. The data is provided by vacancy, year, month, organization, and office. The report was modified to include metrics identifying the number of certificates returned on reviews and the number of certificates sent on reviews that have not been returned. Additionally, the existing optional prompts for series and grade were updated to use the certificate filter series and certificate filter grade query items rather than vacancy series and grade.

- Team Content > USA Staffing Packages and Folders > Hiring Data Warehouse > Certificate

### **Certificate Overview Report – deployed June 9<sup>th</sup>**

The Certificate Overview Report was created. This report provides tabular data displaying an overview of one or more certificate(s), including detailed certificate application information.

- Team Content > USA Staffing Packages and Folders > Hiring Data Warehouse > Certificate



# HDW Reports

## New/Modified Reports

### **New Hire Interconnection Transmission Report – deployed June 23<sup>rd</sup>**

The New Hire Interconnection Transmission Report was created. This report provides tabular data displaying a list of new hire interconnection (NHI) transmissions by organization, office, and new hire.

- Team Content > USA Staffing Packages and Folders > Hiring Data Warehouse > New Hire

### **Tasks by Staffing Number – deployed June 23<sup>rd</sup>**

The Tasks by Staffing Number report was created. This report provides tabular data displaying all staffing and/or onboarding tasks by staffing number (i.e., announcement number, new hire number, request number, or vacancy number).

- Team Content > USA Staffing Packages and Folders > Hiring Data Warehouse > Task





# HDW Reports

## New/Modified Reports

### **Vacancy Overview Dashboard – deployed June 9<sup>th</sup>**

The Vacancy Overview Dashboard was modified. This report displays key vacancy metrics as well as tabular data to the display details about a vacancy, including the total number of applications received and number of applications by status. The report was updated to include columns for vacancy pay plan-series-grade, announcement locations, and USAJOBS job status on several of the pages that include tabular data.

- Team Content > USA Staffing Packages and Folders > Hiring Data Warehouse > Vacancy

### **Vacancy Overview Report – deployed June 9<sup>th</sup>**

The Vacancy Overview Report was modified. This report displays key vacancy metrics as well as details about a vacancy, including the total number of applications received and number of applications by status. The report was updated to include columns for vacancy pay plan-series-grade, announcement locations, and USAJOBS job status on several of the pages that include tabular data.

- Team Content > USA Staffing Packages and Folders > Hiring Data Warehouse > Vacancy



# User License Reports

## New/Modified Reports

### **User Account Details Report – will be deployed July 7<sup>th</sup>**

The User Account Details Report was created. This report provides tabular data displaying a list of users, including account flags, creation date/time, last log-in date/time, and days since last log-in.

- Team Content > USA Staffing Packages and Folders > User License

### **User Accounts by Office/Customer Report – will be deployed July 7<sup>th</sup>**

The User Accounts by Office/Customer Report was created. This report provides tabular data displaying a list of users by user type and by organization and office or customer name, including permission profile details, account flags, creation date/time, last log-in date/time, and days since last log-in as a specific user type.

- Team Content > USA Staffing Packages and Folders > User License



# Hiring Data Warehouse

## Data Model Changes

### **Applicant List Applicants – deployed June 23<sup>rd</sup>**

A new query subject and query items were added to enable reporting on the applicants included on an applicant list.

- Applicants folder
  - Applicant List Information sub-folder
    - Applicant List Applicants query subject
      - [Presentation View].[Applicant List Applicants].[Applicant List Applicant Name]
      - [Presentation View].[Applicant List Applicants].[Applicant List Application Number]



# Hiring Data Warehouse

## Data Model Changes

### **Application Notes – deployed June 23<sup>rd</sup>**

A new query subject and query items were added to enable reporting on the notes associated with an application.

- Applications folder
  - Application Information sub-folder
    - Application Notes query subject
      - [Presentation View].[Application Notes].[Application Note]
      - [Presentation View].[Application Notes].[Application Note Created By]
      - [Presentation View].[Application Notes].[Application Note Created By User Type]
      - [Presentation View].[Application Notes].[Application Note Date/Time]
      - [Presentation View].[Application Notes].[Application Note Visible to Hiring Manager?]



# Hiring Data Warehouse

## Data Model Changes

### **Application Notifications – will be deployed July 7<sup>th</sup>**

A new query subject and query items were added to enable reporting on the notes associated with an application.

- Applications folder
  - Application Information sub-folder
    - Application Notifications query subject
      - [Presentation View].[Application Notifications].[Application Notification Sent By]
      - [Presentation View].[Application Notifications].[Application Notification Sent By Email]
      - [Presentation View].[Application Notifications].[Application Notification Sent Date/Time]
      - [Presentation View].[Application Notifications].[Application Notification Template Name]
      - [Presentation View].[Application Notifications].[Application Notification Template Type]



# Hiring Data Warehouse

## Data Model Changes

### Assessment Item Scoring – deployed June 23<sup>rd</sup>

A new sub-folder, query subject, and query items were added to enable reporting on the item-level scoring protocol of a questionnaire included in an assessment package.

- Assessment Packages folder
  - Assessment Scoring Information sub-folder
    - Assessment Item Scoring query subject
      - [Presentation View].[Assessment Item Scoring].[Item ID]
      - [Presentation View].[Assessment Item Scoring].[Item Is Rated for Rating Combination?]
      - [Presentation View].[Assessment Item Scoring].[Item Linked Competency]
      - [Presentation View].[Assessment Item Scoring].[Item Number on Assessment]
      - [Presentation View].[Assessment Item Scoring].[Item Proportional Weight]
      - [Presentation View].[Assessment Item Scoring].[Item Rating Combination]
      - [Presentation View].[Assessment Item Scoring].[Item Required for Rating Combination?]
      - [Presentation View].[Assessment Item Scoring].[Item Response Base Value]
      - [Presentation View].[Assessment Item Scoring].[Item Response Option]
      - [Presentation View].[Assessment Item Scoring].[Item Response Text]
      - [Presentation View].[Assessment Item Scoring].[Item Response Weighted Value]
      - [Presentation View].[Assessment Item Scoring].[Item Text]



# Hiring Data Warehouse

## Data Model Changes

### **Assessment Scoring Protocol – will be deployed July 7<sup>th</sup>**

New query items were added to the existing query subject to enable reporting on whether scores on manual assessments are to be standardized. Additionally, existing query items were re-named to more closely mirror how the fields are named in the USA Staffing interface.

- Assessment Packages folder
  - Assessment Information sub-folder
    - Assessment query subject
      - [Presentation View].[Assessment].[Rating?] vice [Contains Rating?]
      - [Presentation View].[Assessment].[Screen-Out?] vice [Contains Screen-Out?]
      - [Presentation View].[Assessment].[Standardize Scores Using Custom Values?]
      - [Presentation View].[Assessment].[Standardize Scores?]



# Hiring Data Warehouse

## Data Model Changes

### **Certificate Issuer – deployed June 23<sup>rd</sup>**

A new query subject and query items were added to enable reporting on the notes associated with a certificate.

- Certificates folder
  - Certificate Information sub-folder
    - Certificate Notes query subject
      - [Presentation View].[Certificate Notes].[Certificate Note]
      - [Presentation View].[Certificate Notes].[Certificate Note Created By]
      - [Presentation View].[Certificate Notes].[Certificate Note Created By User Type]
      - [Presentation View].[Certificate Notes].[Certificate Note Date/Time]
      - [Presentation View].[Certificate Notes].[Certificate Note Visible to Hiring Manager?]





# Hiring Data Warehouse

## Data Model Changes

### **Certificate Notes – deployed June 23<sup>rd</sup>**

A new query item was added to the existing query subject to enable reporting on the email address of the certificate issuer and the existing Certificate Issuer query item was updated to include the issuer's middle initial.

- Certificates folder
  - Certificate Information sub-folder
    - Certificate query subject
      - [Presentation View].[Certificate].[Certificate Issuer]
      - [Presentation View].[Certificate].[Certificate Issuer Email]



# Hiring Data Warehouse

## Data Model Changes

### **New Hire Request Tags – deployed June 23<sup>rd</sup>**

New query subjects and query items were added to enable reporting on the tags associated with requests tied to new hire records.

- New Hires folder
  - New Hire Request Information sub-folder
    - New Hire Request Appointing Authorities query subject
      - [Presentation View].[New Hire Request Appointing Authorities].[Request Appointing Authority]
    - New Hire Request Mission Critical Occupations query subject
      - [Presentation View].[New Hire Request Mission Critical Occupations].[Request Mission Critical Occupation]



# Hiring Data Warehouse

## Data Model Changes

### **Vacancy Metrics – will be deployed July 7<sup>th</sup>**

A new query item was added to enable reporting on applicants that declined or withdrew from consideration at the vacancy level.

- Vacancies folder
  - Vacancy Metrics sub-folder
    - Vacancy Metric query subject
      - [Presentation View].[Vacancy Metric].[Total Declined/Withdrawn Applications]



# Hiring Data Warehouse

## Data Model Changes

### **Vacancy Notes – deployed June 23<sup>rd</sup>**

A new query subject and query items were added to enable reporting on the notes associated with a vacancy.

- Vacancies folder
  - Vacancy Information sub-folder
    - Vacancy Notes query subject
      - [Presentation View].[Vacancy Notes].[Vacancy Note]
      - [Presentation View].[Vacancy Notes].[Vacancy Note Created By]
      - [Presentation View].[Vacancy Notes].[Vacancy Note Created By User Type]
      - [Presentation View].[Vacancy Notes].[Vacancy Note Date/Time]
      - [Presentation View].[Vacancy Notes].[Vacancy Note Visible to Hiring Manager?]



## Cognos Tip

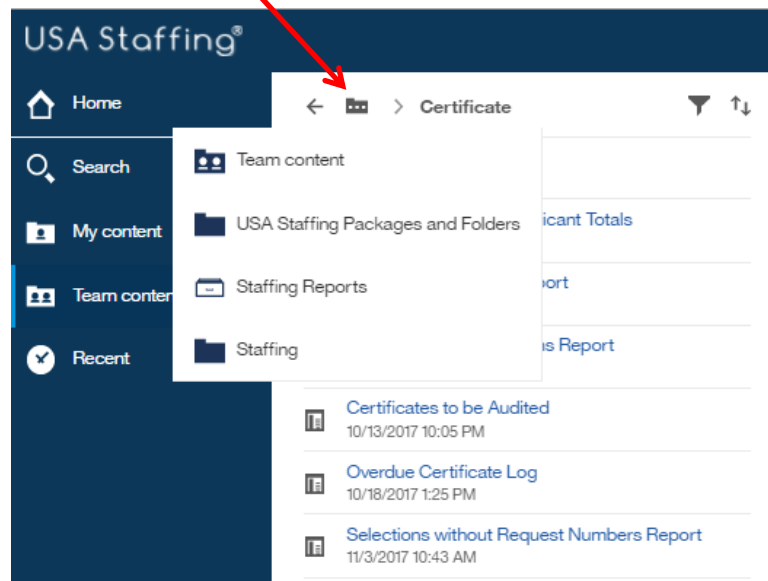
*Maintaining the ability to sort and filter in Excel with grouped data*



## Report Output Options

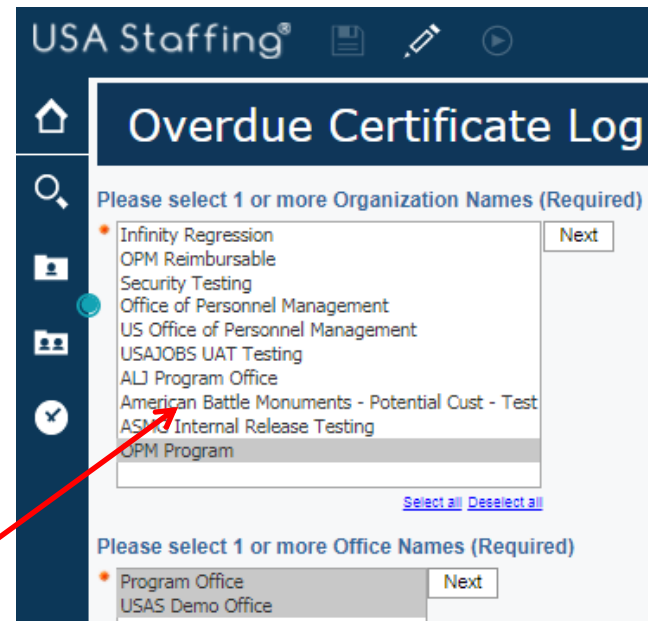
### 1. Locate Report

Navigate to the desired report through Team Content



### 2. Run Report

Enter prompt values and run the report



### 3. Export Report

Reports can be run and exported as HTML, PDF, Excel, CSV, or XML



Run HTML

Run PDF

Run Excel

Run Excel data

Run CSV

Run XML

Show run options



## Excel vs. Excel Data

Running a report in **Excel** maintains **formatting and grouping** settings. **Excel Data** strips **formatting and grouping** to enable filtering and sorting in Excel.

### Excel

Organization Name	Office/Customer Name	User Full Name
OPM Program	09282020	Miller, Janelle
		Test-One, BOT
		Testing, Carrie
	Account Management Branch	Foster, Ozie
		Johnson, Dana
		McCrary, Monique
		Miller, Janelle
		Sarracino, Allison
		Test-One, BOT

### Excel Data

Organization Name	Office/Customer Name	User Full Name
OPM Program	09282020	Miller, Janelle
OPM Program	09282020	Test-One, BOT
OPM Program	09282020	Testing, Carrie
OPM Program	Account Management Branch	Foster, Ozie
OPM Program	Account Management Branch	Johnson, Dana
OPM Program	Account Management Branch	McCrary, Monique
OPM Program	Account Management Branch	Miller, Janelle
OPM Program	Account Management Branch	Sarracino, Allison
OPM Program	Account Management Branch	Test-One, BOT
OPM Program	Account Management Branch	Tester, Stuart's Regression
OPM Program	Account Management Branch	Testing, Carrie

The limitation when running in Excel Data is that **only the first page/tab of a report returns**, impacting all HDW standard reports.



## Report Properties Setting

A newly identified report properties setting **maintains grouping in HTML** but **repeats data in Excel to enable filtering** as well as **returns all report pages/tabs**.

The screenshot shows the USA Staffing application interface. The top navigation bar includes the USA Staffing logo, a search icon, a pencil icon, and a dropdown menu for 'User Accounts by Office/Customer Report'. The left sidebar contains a navigation menu with icons for Home, Reports, Tools, Pages, and Data. The 'Pages' icon is highlighted. The main content area displays the 'Report overview' page, which includes a 'Report description' section with the text 'Tabular report displaying a list of users by user type and by organization and office or customer name'. Below this is a 'Validation' section with a 'Validate Now' button. On the right side, there is a 'Data' section with a 'User License' link. Two red arrows point from the 'Pages' icon in the sidebar to the 'Report overview' page, indicating the navigation path.

**1. Navigate to Pages**  
With the report open for editing, navigate to Pages.

**2. Navigate to Report Overview**  
Click on the Report button to open the Report overview





## Report Properties Setting

**Report**

**RUNNING & VALIDATING**

Run options	
Validate options	
Burst options	
Upgrade information	
Run with full interactivity	Yes

**STYLE**

Theme	
-------	--

**REPORT**

Language	English (Uni...
Name	User Accou...
Report styles	11.4 styles
Page break for interactive HTML	
View pages as tabs	Top left
Paginate saved HTML output	Yes
Use 1.x CSV export	No
Group repeating cells - export to Excel	<div>(Default) No Yes</div>
PDF page setup	
Conditional layouts	

**DATA**

Data formats	
Package-based drill-through source	Yes
Dynamic filtering	Yes

**3. Open Properties**  
Click the Properties icon.

**4. Set the "Group repeating cells – export to Excel" to "No"**  
Modify the setting then save your report.

### Excel

Organization Name	Office/Customer Name	User Full Name
OPM Program	09282020	Miller, Janelle
OPM Program	09282020	Test-One, BOT
OPM Program	09282020	Testing, Carrie
OPM Program	Account Management Branch	Foster, Ozie
OPM Program	Account Management Branch	Johnson, Dana
OPM Program	Account Management Branch	McCrary, Monique
OPM Program	Account Management Branch	Miller, Janelle
OPM Program	Account Management Branch	Sarracino, Allison
OPM Program	Account Management Branch	Test-One, BOT
OPM Program	Account Management Branch	Tester, Stuart's Regression
OPM Program	Account Management Branch	Testing, Carrie
OPM Program	Account Management Branch	User, Test

We will be reviewing standard reports to adjust this setting where appropriate.



## Open Demo and Q&A



## Resources and Contacts

### IBM Cognos Analytics User Guide

The official IBM user guide for Reporting via Cognos Analytics:

[https://www.ibm.com/support/knowledgecenter/SSEP7J\\_11.0.0/com.ibm.swg.ba.cognos.ug\\_cr\\_rptstd.doc/ug\\_cr\\_rptstd.pdf?view=kc](https://www.ibm.com/support/knowledgecenter/SSEP7J_11.0.0/com.ibm.swg.ba.cognos.ug_cr_rptstd.doc/ug_cr_rptstd.pdf?view=kc)

### USA Staffing Resource Center

Under the Reports and Analytics section, you'll find presentations from previous workgroup sessions and other resources:

[https://help.usastaffing.gov/ResourceCenter/index.php?title=USA\\_Staffing\\_Resource\\_Center](https://help.usastaffing.gov/ResourceCenter/index.php?title=USA_Staffing_Resource_Center)

### Need Help?

If you are experiencing issues accessing Cognos or need help to create or troubleshoot a report, submit a HelpDesk ticket through USA Staffing. If you are unable to submit a HelpDesk ticket, please contact us at

[USASTaffingData@opm.gov](mailto:USASTaffingData@opm.gov)