



Seven enhancements (5 FIN, 1 HCM, and 1 Global) have been released in the OAKS Business Intelligence environment for December. The enhancements include new fields, new trees to assist with filtering reports, and the availability of job and report scheduling for all OAKS BI Cognos users.

The enhancements to the FIN package are as follows:

1. A new field entitled 'TA Report Description' has been added to the "Travel & Expense - Travel Authorization" subject area in the presentation layer. Some agencies use this field for audit and tracking purposes.
2. Travel & Expense authorization deletes that occur in OAKS are now being updated in EPM so the deleted authorizations do not show up in the BI environment.
3. A tree, OH_FUNDS, has been added to the presentation layer for the "General Ledger - Aggregate Balances", "General Ledger - Period Balances", and "General Ledger - Journal Entries" subject areas.
4. The OH_DEPTID_COMBO tree has been added to the presentation layer for the "General Ledger - Aggregate Balances", "General Ledger - Period Balances", and "General Ledger - Journal Entries" subject areas.
5. The CC_DEPT_AGENCY tree has been added to the presentation layer for the "General Ledger - Aggregate Balances", "General Ledger - Period Balances", and "General Ledger - Journal Entries" subject areas.

NOTE: Descriptions of trees can be found in the GL Trees report in the Data Dictionary.

The enhancement to the HCM Package is as follows:

1. The 'Military Status' field from OAKS has been added to the BI Cognos presentation layer. This new field is located in the 'Person Details' folder of the "Workforce - Time & Labor" and "Workforce - Employee Job" subject areas. It will allow agencies to identify employee's military status such as 'Active Reserve', 'Inactive Reserve', 'Vietnam-Era Veteran', 'Not a Veteran' or 'Not Indicated', among other designations.

The global enhancement applicable to both the FIN and HCM packages is as follows:

The final December enhancement is not limited to a specific Package: the ability to schedule reports in the new OAKS BI Cognos, previously limited to just Agency Administrators as the system stabilized, has now been opened up to all users.

This is a great tool that can make your use of Cognos more efficient. For instance, if you have a report that is used at regular intervals (e.g. every Monday, or the last Friday of the month) and that report takes several minutes to run, it may be a candidate for scheduling.

To ensure that scheduling performs optimally for everyone, people need to be aware of a few things. Some actions which **are recommended**:

- 1) If you are scheduling multiple reports or jobs, schedule them one after the other rather than all at the same time. Your results will be much better this way.
- 2) To avoid a log jam of reports waiting to run, schedule reports at times other than on the hour (e.g. schedule at 8:06 instead of 8:00).
- 3) If your report contains drillable data that you want to use, have a link to the report e-mailed to you - do not schedule delivery as an Excel spreadsheet attachment.

Additionally, **these actions are NOT recommended:**

- 1) Above all, do not schedule reports that simply dumps large amounts of raw, unfiltered data for you to sort through in Excel or import into your agency's database; this is a real drain on system resources and has a negative impact on everyone.
- 2) Do not create jobs with many reports scheduled to run at once.
- 3) Do not schedule many reports at the same; space them out.
- 4) Do not e-mail large reports. The e-mail server does not allow files greater than 10 MB, even though the report runs successfully in Cognos.
- 5) Do not schedule reports to run every day, especially if the report is not used every day. In addition there is no reason to pull un-refreshed data over the weekend.
- 6) Do not schedule reports which run quickly or whose input prompts will change each time the report runs.

The BI Team will be monitoring schedules, etc. to ensure that they are used appropriately.

Finally, if you would like to review how to schedule reports, please check the on-line training course, DAS-BI-102, available in ELM. If, after reviewing the training material you find that you still cannot schedule a report, please contact the OAKS Help Desk at oaks.helpdesk@oaks.state.oh.us.