

# PLANSOURCE<sup>®</sup>

## Cognos Analytics Reporting User Interface

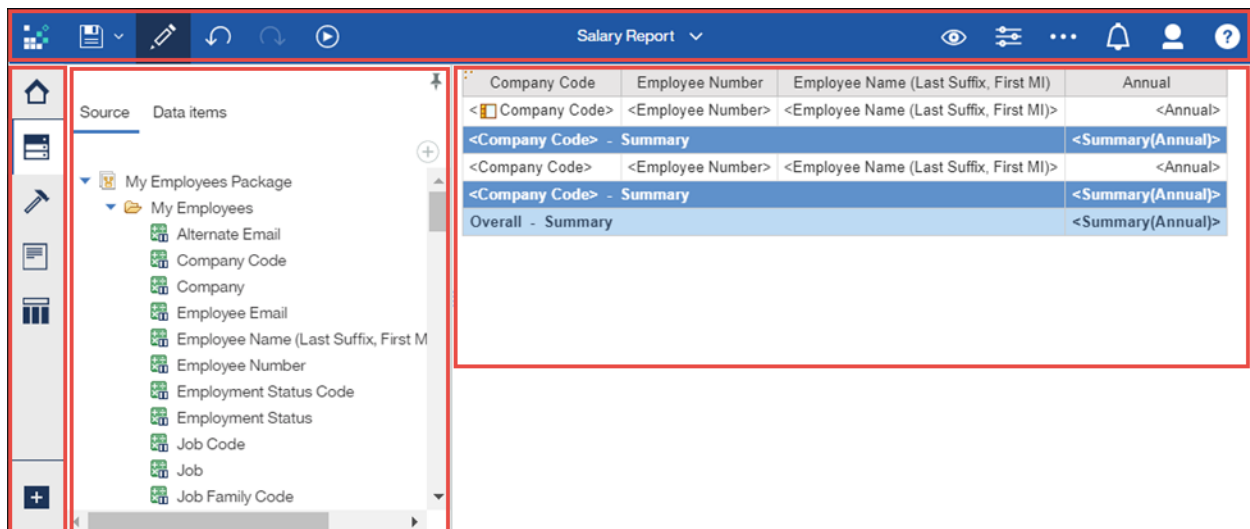
*Business Intelligence*

### Cognos Analytics Reporting

Cognos Analytics Reporting is a Web-based tool used to create ad-hoc reports for analysis of business data as well as complex, professional reports for enterprise-level reporting.

A single reporting tool is used for business reporting and professional report authoring.

Authors and Report Administrators are able to create and modify reports using Reporting.

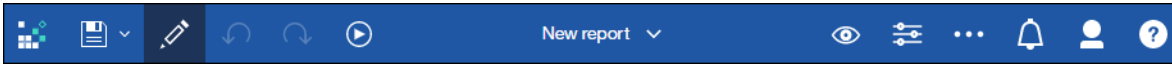


The Reporting user interface includes these sections:

- Application bar
- Side panel
- Content pane
- Work area

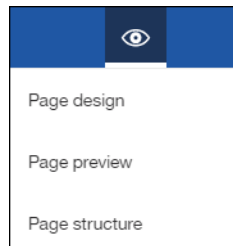
#### Application Bar

The Reporting application bar enables you to save reports and report views, run reports, switch report views, and view report object properties.

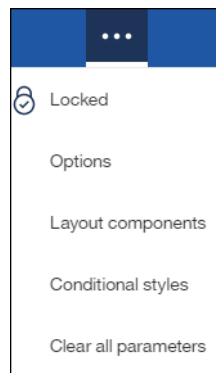


The following icons are available on the application bar:

- Save As - Save the report to My Content, or save the report as a report template.
- Edit - Edit a report in Reporting. Available only for users with permission to access Reporting.
- Undo/Redo - Remove or repeat the previous action.
- Run Options - Run the report to HTML, PDF, Excel, Excel Data, and CSV format. Show Run Options enables you to run the report with All Data, Limited Data, or No Data.
- Application Bar Drop-Down List - Navigate between open reports, close open reports, and navigate to the Welcome page.
- Page Views - View the report in Page Design, Page Preview, or Page Structure modes.



- Show Properties - View and change the properties of an item or object in your work area. The Properties pane provides a large selection of options with many of the more commonly used properties available to format all objects.
- More - Select to lock/unlock the report layout, view layout components and conditional styles, and other options.



- Notifications - View notifications of reports scheduled to run on a regular basis.

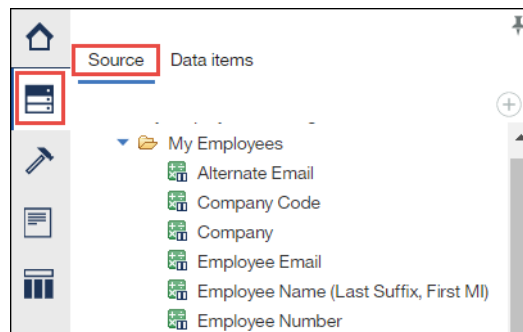
- My Preferences - Modify your Cognos Analytics preferences including the home page, report output format, preferred time zone and language, and more.
- Help - Access documentation from IBM.

### Side Panel and Content Pane

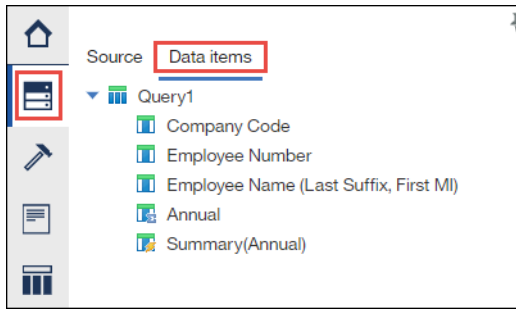
The Reporting side panel displays data and toolbox items in the Content pane that can be added to the report layout.



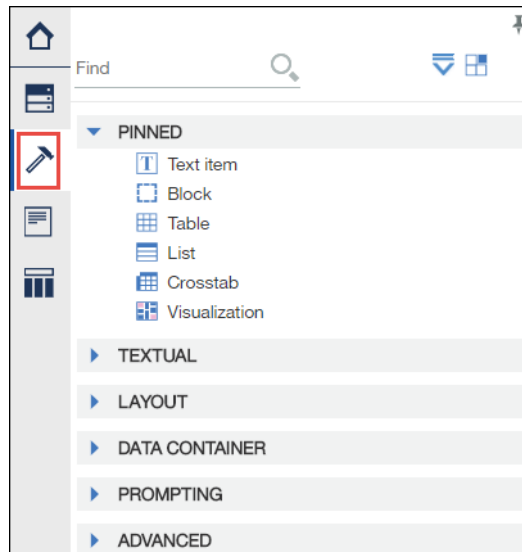
- Home - Returns you to your selected starting page.
- Data - Displays content that you can add to the report layout. The Data icon includes two tabs.
  - The Source tab allows you to insert data items from the package into the report layout.



- The Data Items tab allows you to insert data items into your report that already exist in your query.

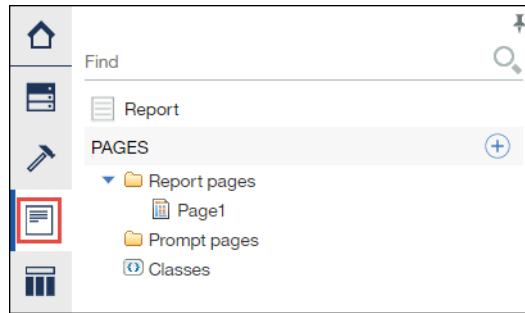


- **Toolbox** - Displays objects that you can add to your report, such as a visualization, table, or text. Toolbox items are organized into groups. Add items that you use frequently to the Pinned group.

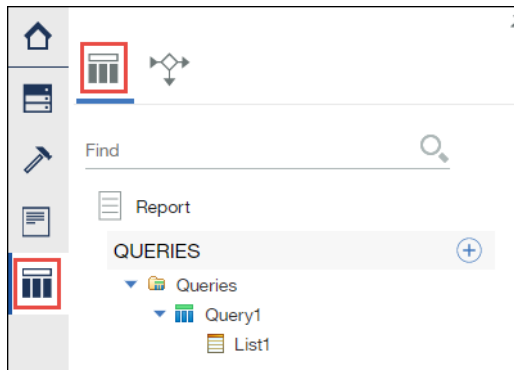


When you begin the report creation process, items from the Pinned group appear in the Add (+) menu in the work area. To add a toolbox item to the Pinned group, locate the item in a group, right-click the item, and then select Add to Pinned Toolbox Items. To delete an item from the Pinned group, right-click the item and then select Remove from Pinned Toolbox Items.

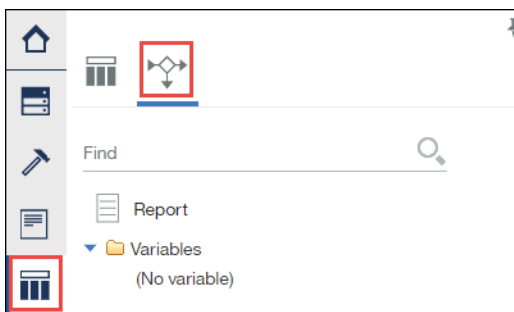
- **Pages** - Enables you to explore the structure of a report. Page explorer is used to create and modify report pages, prompt pages, and classes (local and global).



- Queries - Enables you to explore queries and conditional variables in the report. The Queries icon includes two tabs.
  - Query Explorer is used to create and modify queries and perform complex tasks such as defining unions and joins to be used in a report.



- Condition Explorer is used to create and modify variables to define conditions that will be used to format the report.

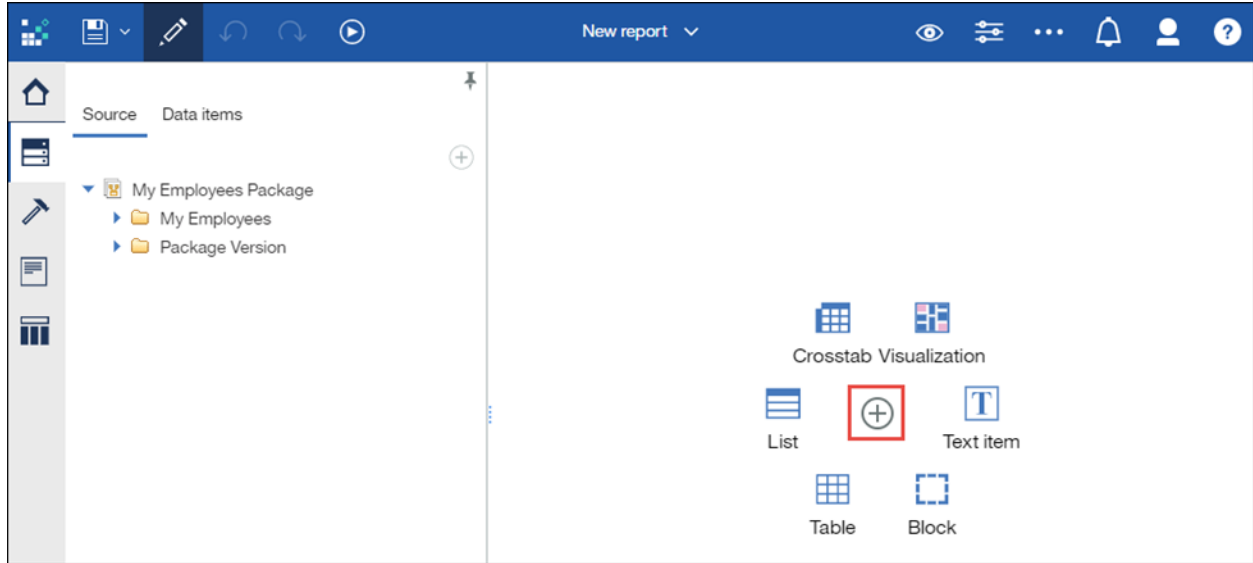


## Work Area

Reports are built in the Reporting work area.

When first creating a report, the Reporting work area displays a + icon. Select the + icon and then select a report layout.

The default menu objects are located in the Pinned group of the Toolbox.



Drag data items and toolbox objects from the Content pane to the work area to build a report.

