

PLANSOURCE[®]

Student Manual

Cognos Analytics

Review of how to access the portal


1. From the HCM home page, select Menu and then from the expanded menu select Administration.
2. Select Business Intelligence.
3. The Welcome page appears.

Navigating the folders (Team Content/My Content)

1. Public Folders = Team Content
2. My Folders = My Content

Running a delivered report

Familiarize yourself with the extensive library of delivered Business Intelligence reports. (Team Content > zzzCompany Folders > Company Named Folder (ABC Company) > Ultipro > PlanSource Delivered Reports)

1. Select a folder (Human Resources)
2. Click the report name (Employee Birthdays)
3. Select prompt option(s): First three months
4. Run Report
3. Exporting the report
 - To export the report, select the triangle dial in the top left-hand corner. 
 - Choose the export option (e.g. HTML, PDF, Excel, Excel Data, CSV, XML)

Building a simple list report

Select a Report Package

Business Intelligence packages link your UltiPro data to Reporting.

NAVIGATION: Welcome Page > New > Report > Templates and Themes

1. From the Source tab, the Blank Report Template is highlighted. Click OK.
2. From the Source tab, select Add Report Data (+).

3. In the Open File dialog box, navigate to a package location, select a package, and then select Open.
 - **Location: Team Content > UltiPro BI Content > UltiPro BI for Core HR and Payroll > UltiPro Delivered Packages > My Employees Package**
Package data items appear on the Source tab.
4. From the Source tab, expand the package folders to view data items.

Select a Report Layout

Many Reporting layouts are available, including list, crosstab, visualization, and more.

1. Select the + icon in the center of the work area, and then select a report layout.
 - Selection: List
Items available for the report layout are listed in the Toolbox, the Pinned section. You can change the default layout objects that appear.
2. In the Object and Query Name dialog box, rename the object and select a different query, if needed, and then select OK.
 - No action required.

To build a report, move data items from the Source tab to the report layout in the work area, add filters if needed, format the report, and then save the report.

Adding data items to a Report Layout

There are several ways to add data items to the report layout.

1. In the Content pane, expand the My Employees folder, and then double-click the **Company Code** data item. The data item appears in the work area.
2. From the Content pane, drag **Employment Status Code** to the right of the Company column. Important: Drop zones are very specific. To add a new column to a report layout, drop the data item only when three vertical lines appear at the target area.

Company	Employee Name (Last Suffix, First MI)
<Company>	<Employee Name (Last Suffix, First MI)>
<Company>	<Employee Name (Last Suffix, First MI)>
<Company>	<Employee Name (Last Suffix, First MI)>

If a solid vertical line appears, then a singleton is added to the work area. A singleton object retrieves only the first-row value for that query when a report is

Company	Employee Name (Last Suffix, First MI)
<Company>	<Employee Name (Last Suffix, First MI)>
<Company>	<Employee Name (Last Suffix, First MI)>
<Company>	<Employee Name (Last Suffix, First MI)>

To undo an incorrect drop, select the Undo icon from the toolbar.

3. Right-click Employee Number, and then from the drop-down list, select Insert. Data items are inserted to the right side of the report specification.
4. In the Content pane, double-click Employee Name (Last Suffix, First MI).
5. From the Content pane, drag Job Code to the end.

Save a Report

Reports saved in My Content are available only to you. Reports saved in Team Content can be shared with other users. Save any works in progress to My Contents before copying a version of that report to Team Content to share with others.

Reports that must be run in your absence can only be run by others from a shared location in Team Content.

Save important content in a public location.

1. From the application bar, select the Save icon.
2. From the Save As dialog box, select My Content.
3. In the Save As field, enter a name and then select Save.
 - **Save As: Employee List Report**

Activity – Create a List Report

Complete this activity to practice creating a list report.

1. Create a list report using the My Employees Package.
 - Location: Team Content > UltiPro >BI Content > UltiPro BI for Core HR and Payroll > UltiPro Delivered Packages > My Employees Package
2. Add data items to the list in the order shown.

Data Item	Location
Company Code	My Employees
Employment Status Code	My Employees
Employee Number	My Employees
Employee Name (Last Suffix, First MI)	My Employees
Job Code	My Employees

3. Run the report in Excel format.
4. Save the report to the My Content folder. Name the report: Employee List Report

Move a Report Column

There are several ways to move a report column to a new position in the report layout.

1. Select a column.
 - **Column: Employment Status Code**
2. Drag the selected column to the desired location.
 - **Location: Right side of the Employee Name column**
3. Select a column.
 - **Column: Job Code**
4. From the on-demand toolbar, select the More icon and then select Cut.
5. Select a column.
 - **Column: Employee Number**
6. From the on-demand toolbar, select the More icon and then select Paste.
The column that was cut is pasted to the left of the selected column.

Delete a Report Column

A column can easily be deleted from the report layout.

1. Select a column.
 - **Column: Employment Status Code**
2. From the keyboard, press the Delete key.
You can also right-click the column and select the More icon from the on-demand toolbar. Then, from the drop-down list, select Delete.

Modify a Column Heading

A column heading automatically uses the name of the item in the data source. You can change the heading to make it more meaningful. Changing the column name in the report does not change the name of the item in the data source.

1. Select a column heading.
 - **Column heading: Employee Name (Last Suffix, First MI)**
2. From the on-demand toolbar, select the More icon and then from the drop-down list select Edit Data Item Label.

3. In the Data Item Label field, enter the column name and then select OK.
 - **Data Item Label: EE Name**

Modify Page Views

Reporting allows you to easily switch from page design to page preview mode. You can also view a report's underlying page structure.

The default view, Page Design mode, displays placeholder data. Page Preview mode displays the report page with live data. In Page Preview mode you can modify the report using the on-demand toolbar. Page Structure mode displays an overview of all report objects in your report in a tree structure, organized by page.

1. From the application bar, select the Page Views icon.
2. From the drop-down list, select Page Preview.
Live data displays in the report layout.
3. From the application bar, select the Page Views icon, and then from the drop-down list, select Page Design.
The default view is restored.
4. Save the modified report version.

Activity - Modify a List Report

Complete this activity to practice modifying the Employee List report in the My Content folder.

1. Change the Employee Name (Last Suffix, First MI) column header to EE Name.
2. Move the Employment Status Code column to the right of the Employee Name (Last Suffix, First MI)
3. Move the Job Code column to the left of the Employee Number column.
4. View the report in Page Preview mode, and then return to Page Design mode.
5. Run the report in Excel format.
6. Close the report viewer, and on the report layout, delete the Employment Status Code column.
7. Run the report in Excel format, view the report output, and then close the spreadsheet.
8. Save the report to the My Content folder.
9. Navigate to the Welcome page.