

PLANSOURCE[®]

Student Manual

Cognos Analytics

Navigate to My Content and open the report we created in last week's training.

NAVIGATION: My Content > Employee List Report > Edit Report

Using methods discussed last week we'll be adding the below data items to the report.

1. Employment Status Code – My Employees
2. Annual Salary – My Employees > Jobs > Compensation Information > Compensation

Filter for a Single Value

Filters remove unnecessary report data. The Select Value icon allows you to select a single filter value from a list.

1. Select the **Employment Status Code** column, and then from the on-demand toolbar, select Filters.
2. From the drop-down list, select Edit Filters, and then from the Filters dialog box, select Add .
3. From the Create Filter dialog box, select the Advanced radio button, and then select OK.
4. From the Detail Filter Expression dialog box, select the Data Items tab.
5. Move a data item from the Available Components pane to the Expression Definition pane.
 - **Data Item: Employment Status Code**

Hint

Filter on codes rather than on descriptions for both processing efficiency and accuracy. It is possible for two data items to have different codes but identical descriptions. Filtering on the code is the only way to ensure that the correct data item is being retrieved.

6. To the right of the data item in the Expression Definition pane, enter an equal sign (=).
Use the equal sign when filtering for a single value.
7. With the data item selected in the Available Components pane, select the Select Value icon above the Expression Definition pane.
8. From the Select Value dialog box, make a selection, and then click Insert.
 - **Employment Status Code: A for active**
9. Select the Validate icon, and then select OK.
The filter expression appears in the Filters dialog box.
10. Select OK again.
11. Run the report in HTML format, review the report output, and then close the report viewer.
You can run the report or work in Page Preview mode to view report output.

Filter for Multiple Values

You can easily edit a single-value filter to filter for multiple values. The Select Multiple Values icon allows you to select filter values from a list.

1. Select the Job Code column, and then from the on-demand toolbar, select Filters.
2. From the drop-down list, select Edit Filters, and then from the Filters dialog box, select Add.
3. From the Create Filter dialog box, select the Advanced radio button, and then select OK.
4. From the Detail Filter Expression dialog box, select the Data Items tab.
5. Move a data item from the Available Components pane to the Expression Definition pane.
 - **Data Item: Job Code**
6. To the right of the data item in the Expression Definition pane, use the 'in' operator to filter for more than one value.
 - **Expression Definition: [Job Code] in**
Note: Ensure the data item that is being filtered is highlighted.
7. From the toolbar above the Expression Definition pane, select the Select Multiple Values icon.
8. In the Select Multiple Values dialog box, move values from the Values pane to the Selected Values pane.
 - **Values: First 5 Job Codes that appear**
9. Select Insert.
10. Validate the expression and then select OK two times.
11. Run the report in HTML format, view the report output, and then close the report viewer.

Filter on Data Not in the Report Layout

You can filter for data items that do not appear in the report layout.

1. Select any column, and then from the on-demand toolbar, select Filters.
2. From the drop-down list, select Edit Filters, and then from the Filters dialog box, select Add.
3. From the Create Filter dialog box, select the Advanced radio button, and then select OK.
4. From the Available Components pane Source tab, move a data item to the Expression Definition pane.

- **Location: My Employees**
- **Data Item: Supervisor Name**

5. In the Expression Definition pane, complete the expression.
Type the following to the right of the data item: is not null
6. Validate the expression. Click ok twice.
7. Run in HTML once more, review the report output, and then close the report viewer.

Alternatively, add the data item to the report layout, and then create a filter. Cut (do not delete) the column from the report layout.

Disable a Filter

Disabling a filter permits you to use the filter again in the future.

1. Select any report column, and then from the on-demand toolbar, select Filters.
2. From the drop-down list, select Edit Filters.
3. Select a filter.
 - **Filter: [My Employees].[Supervisor Name (Unsecured)] is not null**
4. From the Usage section, select the Disabled radio button, and then select OK.
5. Run the report in HTML format, review the report output, and then close the report viewer.

Delete a Single Filter

Delete a filter when it is no longer needed.

1. Select any column, and then from the on-demand toolbar, select Filters.
2. From the drop-down list, select Edit Filters.
3. From the Filters dialog box, select the filter to be deleted.
 - **Filter: [Employment Status Code] = 'A'**
4. Select the Delete Icon, and then select OK.
5. Run the report in HTML format, review the report output, and then close the report viewer.

Activity – Create Filters

Complete this activity to practice creating report filters using the Employee List Report in the My Content folder.

NAVIGATION: My Content > Employee List Report > Edit Report

1. Add Employment Status Code and Annual
2. Filter for a single value: Employment Status Code. Use the Select Value icon.
 - Completed expression: [Employment Status Code] = 'A'
3. Filter on Job Code for multiple values. Select the first 5 job codes in the selection list.
 - Completed expression: [Job Code] in ('ACCOUNT','ACCTPAY','ADMIN','AM','APAR')
4. Add a filter for Supervisor Name.
 - Completed expression: [My Employees].[Supervisor Name (Unsecured)] is not null
5. Disable the Supervisor Name filter.
6. Delete the filter for Employment Status Code.
7. Save the report to the My Content folder. Name the report Employee List - Filter

Data Sort

Sort your report data in ascending or descending alphabetical, numeric, or date order.

1. Select a report column
 - **Column: Company Code**
2. From the on-demand toolbar, select Sort, and then from the Sort drop-down list, make a selection.
 - **Sort Order: Descending**

An arrow appears beside the data item in the column heading to indicate the sort order.
3. Run the report in HTML format, review the report output, and then close the report viewer.
4. Select another report column.
 - **Column: EE Name**
5. From on-demand toolbar, select Sort, and then from the Sort drop-down list, make a selection.
 - **Sort Order: Ascending**

The column selected second is sorted, however, the sort for the first column is removed.
6. From the drop-down list, select Don't Sort. Sort order is removed.

Perform Advanced Sorting

To sort multiple report columns, use the Edit Layout Sorting menu.

1. Select a report column.
 - **Column: EE Name**
2. From the on-demand toolbar, select Sort, and then from the Sort drop-down list, select Edit Layout Sorting.

The Grouping and Sorting dialog box appears.
3. From the Data Items pane, drag a data item to the Groups pane and drop it on top of the Detail Sort List folder.
 - **Data Item: Employee Name (Last Suffix, First MI)**

The column is sorted in ascending order.
4. From below the Groups pane, select the Sort Order icon.

The column is sorted in descending order.
5. From the Data Items pane, drag a data item to the Groups pane and drop it on top of the Detail Sort List folder.

- **Data Item: Company Code**

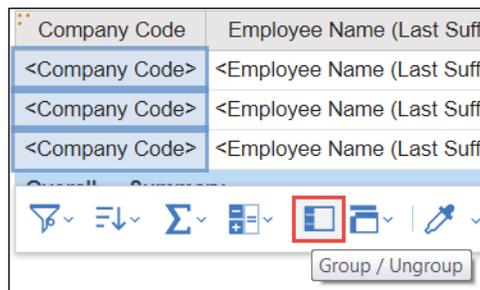
The arrow to the left of each data item indicate the sort order.

The icons below the Groups pane can be used to change the sort order, the sort priority, and delete the sort. To modify sort priority, you can also drag a data item up or down in the list.

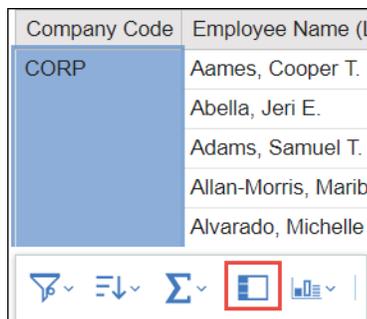
6. Select Ok.
7. Run the report in HTML format, review the report output, and then close the report viewer. Sorting is applied to the columns in the order listed.
8. Save the report.
 - **Location: My Content**

Data Groups

Grouping a column enables you to organize similar data items and display their value only one time. To group and ungroup a column, select the Group/Ungroup icon on the on-demand toolbar.



You can also group data in the report viewer for HTML output.



Ungrouping a column removes any sort applied to the data item.

Group Report Data

Group data items in a list report to remove duplicate values.

1. Select a report column.
 - **Column: Company Code**

Hint

To perform multiple groupings at once, use CTRL+click or Shift+click.

2. From the on-demand toolbar, select Group/Ungroup
The group indicator appears in the column.
3. Run the report in HTML format and review the report output.
4. Close the report viewer.
5. Select the grouped column and then from the on-demand toolbar, select Group/Ungroup.
Grouping is removed.

Activity – Organize Report Data

Complete this activity to practice organizing report data.

1. In the report viewer, use the on-demand toolbar to sort the report by Company Code in descending order (from Z to A).
2. Select EE Name, use the on-demand toolbar to Edit Layout Sorting in ascending order (from A to Z).
3. Remove the sort for Company Code column.
4. Run the report in HTML format and review the report output.
5. In the report viewer, use the on-demand toolbar to group the Company Code column.
6. Ungroup the Company Code column.
7. Close the report viewer.

Name the report Employee List – Organized and save it to My Content.