

PLANSOURCE[®]

Student Manual

Cognos Analytics

Add a Prompt to a Filter

Add a prompt to a filter to add interactivity to the report. Prompts allow you to change filter criteria when the report is run.

NAVIGATION: My Content > Employee List – Organized > Edit Report

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 Add.
4. From the Create Filter dialog box, select the Advanced radio button, and then select OK.
5. From the Detail Filter Expression dialog box, select the Data Items tab.
6. Move a data item from the Available Components pane to the Expression Definition pane.
 - **Data Item: Company Code**
7. In the Expression Definition pane, complete the expression.
 - **Type the following to the right of the data item: in ?Select a Company?**
You can easily add a prompt to a report by enclosing the name in question marks. Reporting automatically selects a prompt type based on the type of data item selected.
8. Select the validate icons.
A prompt dialog box appears.
9. From the drop-down list, make a selection, and then select OK.
 - **Provide a Value: CNTRL**
10. Select OK two times.
11. Run the report in HTML format.
12. From the report viewer, select the Run icon.
The Prompt Page appears again.
13. Make a different selection, and then select OK.
 - **Provide a Value: CORST**
14. Close the report viewer.
15. Save the report as Employee List – Organized with Prompt and save to My Content.

Delete All Filters

All report filters can be deleted at the same time.

1. Select any column, and then from on-demand toolbar, select Filters.
2. From the drop-down list, select Remove All Filters.
3. Run the report in HTML format, review the report output, and then close the report viewer.

Section Report Data

Break a report into sections to improve report clarity. The selected data column becomes a section header.

1. Select a report column.
 - **Column: Company Code**
2. From the on-demand toolbar, select Section/Unsection, and then from the drop-down list, select Section/Unsection.
The selected data item appears above the list container.
3. Run the report in HTML format and review the report output.
4. Use the navigation controls to scroll through the report to view section headings.
More than one section can appear on a single HTML page.
5. Close the report viewer.

Remove Report Sections

You can remove a section and reinsert the data item that was used to create a section in the list container.

1. Select the section heading.
 - **Section Heading Company Code**
2. From the on-demand toolbar, select Section/Unsection, and then from the drop-down list, select Section/Unsection.
Any section heading that is removed will be positioned to the left side of the report layout.

For example, if the report had been sectioned by Employment Status Code, unsectioning the report would result in the Employment Status Code column being added to the left side of the report specification.

From the application bar, select Save.

Page Break Data

Break a report into separate pages, the selected data column becomes a section header.

1. Select a report column.
 - **Column: Company Code**
2. From the on-demand toolbar, select Section/Unsection, and then from the drop-down list, select Set Page Break.
Click OK on the dialog box "A new page will be displayed for each value of "Company Code"
3. Run the report in Excel format, select all on the Prompt Page, and review the report output.
4. Use the navigation controls to scroll through the report to view Company page breaks.
5. Close the report viewer.

Activity – Create a Prompt and a Section

Complete this activity to practice creating a prompt for a filter.

1. Open the Employee List – Organized report (Location: My Content folder).
2. Create a prompt to filter by Company.
 - **Expression: [Company Code] in ?Select a Company?**
3. Validate the expression. Select the first option that appears when prompted.
4. Run the report in HTML format. Select the first option that appears when prompted.
5. Section the report by Job Code, create a Page Break by Company Code, and then run the report in Excel format.
6. Close the report viewer.
7. On the report layout, unsection the report by Job Code, and then run the report in HTML format.
8. Save the report to the My Content folder as Employee List – Organized with Prompt.

Calculations

A calculation is an expression created in Reporting that extends your data beyond what is stored in the database. Calculations can be based on numeric or non-numeric data.

An expression is any combination of operators, constants, functions, or other components that evaluate to a single value.

Calculation results are not stored in the underlying data source. Instead, reporting re-runs the calculation each time the report runs. The results are always based on the most current data in the data source.

Create a Calculation Based on Numeric Data

Calculations can be created to extend your use of numeric data items.

You can create a calculation using the Query Calculation object in the Toolbox, and then adding an expression.

You can also select a measure data item in the report layout, and then select the Insert Calculation icon from the on-demand toolbar. Cognos Analytics Reporting suggests calculations that relevant to the data item.

1. From the side panel, select the Toolbox Icon.
2. Expand the Textual divider, and then drag the Query Calculation object to the right of a column in the report layout.
 - **Column: Annual**
3. In the Name field, enter a name for the new column heading.
 - **Data Item: Annual + 2% Increase**
4. From the Available Components pane, select the Data Items tab.
5. Move the data item on which the calculation is based to the Expression Definition pane.
 - **Data Item: Annual**
6. In the Expression Definition pane, complete the expression
 - **Enter text: * 1.02**
7. Validate the expression, and then select OK.
8. Run the report in HTML format, view the report output, and then close the report viewer.
9. Name and save the report.
 - **Location: My Content**
 - **Report Name: Employee List with Increase**

Summarize Report Data

Numeric and non-numeric data can be summarized in a report.

NAVIGATION: My Content > Employee List with Increase

The type of summary depends on the type of data item. Count and Count Distinct are available for text data items. Total, Average, Maximum, Minimum, Median, Standard Deviation, and Variance summaries are available for numeric data items.

1. Modify the report as needed.
 - Group the Job Code column
2. Run the report in HTML format.
3. In the report viewer, select a column, and then from the on-demand toolbar select Summarize, and select a summary type.

Column Name	Summary Type
Employee Name	Count
Employee Name	Count Distinct
Annual	Average

4. Use the navigation links at the bottom of the report viewer to view the summaries on the last report page.
5. Close the report viewer.
6. From the message dialog box, select Leave.

Add Data Format

Adding formatting to your data fields allows you to update the format type for selected data items.

1. Select a report column
 - Annual
2. From the on-demand tool bar, select Data Format
3. From the drop-down Format Type list select Number
4. From the available options in the Properties window make the selections
 - Number of decimal places: 2
 - Use Thousand separator: No
5. Click OK

6. Run the report in HTML format, view the report output, and then close the report viewer

Turn Off Auto Group and Summarize

Reporting automatically groups and summarizes report data. If your Business Intelligence reports return an error, turn off the Auto Group and Summarize.

1. From the application bar, select the More icon, and then select Options.
The Options page appears.
2. Select the Report tab, and then uncheck the Automatic Group and Summary Behavior for Lists.
3. Select Apply, and then select OK.

Hint

Turning off Auto Groups and Summarization only works with new reports. Previously defined reports will not be affected by the change.

Activity – Create Calculations and Summaries

Complete this activity to practice creating calculations and summaries.

1. Using the Employee List with Increase report, add a calculation to the right of the Annual column.
 - Column Name: Annual + 2% Increase
 - Expression Definition: [Annual] * 1.02
2. Validate the expression.
3. Run the report in HTML format, view the report output, and then close the report viewer.
4. Add a Count Distinct to the Employee Name column.
5. Save the report to the My Content folder as Employee List with Increase.