

PLANSOURCE[®]

Student Manual

Cognos Analytics

Formatting a Report

NAVIGATION: *My Content > Employee List with Increase > Edit Report*

To add a report title:

1. Right click from the work area, using the on-demand tool bar select the more option.
2. Click Headers & footers, create header
3. In the header a + icon will appear, select Text.
4. Enter report name Employee List with Increase.
Report title will appear above the work space.
5. Select the header once more to change the Font. This includes family, size, weight, style...
6. Select the all column headers by holding down the shift button on your keyboard and clicking the first column Job Code and the last Annual + 2% Increase
7. From the on-demand toolbar, select Font
8. From the Font window change the font to the desired font including family, size, weight, style, and effects
9. With the columns highlighted also change the background color for the column headers.
From the on-demand toolbar, select Background color, from the drop-down select any color.
10. From the on-demand toolbar, horizontal and vertical alignments can be modified.

Apply Styles to the Report:

In addition to the header, styles can be applied to the report work area.

1. Select the all column by holding down the shift button on your keyboard and clicking the first column Job Code and the last Annual + 2% Increase
2. From the on-demand toolbar, select Font
3. From the Font window change the font to the desired font including family, size, weight, style, and effects
4. With the columns highlighted also change the background color for the column headers.
From the on-demand toolbar, select Background color, from the drop-down select any color.
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Activity – Formatting a Report

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Report title will appear above the work space.
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6. Select the all column headers by holding down the shift button on your keyboard and clicking the first column Job Code and the last Annual + 2% Increase
7. From the on-demand toolbar, select Font
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6. Save the Report Changes

Formatting a Report (cont'd)

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.

Once a report is completed it can be saved or moved to Team Content.

1. From the side panel, select My content.
2. Locate the report from the available reports list then choose the More link. From the drop-down list select Copy or move.
3. From the Select a destination page choose the location you wish to copy or move the report.
 - **Team Content > zzzCompany Folders > PlanSource Demo Company > Ultipro > _SALPS > Shared Reports**
 - **Select Copy to or Move to**

Convert Query Studio Reports to Reporting

All Query Studio reports can be accessed and run in the new Reporting tool.

Any reports created by your organization in Query Studio that need EDITS to the report must be manually converted before the report can be modified in the new Reporting.

1. Navigate to the location of a Query Studio report.
2. Select the More link to the right of the report name.
3. From the drop-down list opposite the name of the Query Studio report, select Convert to Report.
4. Modify the report in Reporting, as needed.
5. From the application bar, select the drop-down arrow to the right of the Save icon, and then select Save As.
6. Name and save the report.
7. Run the report in HTML format.

Turn Off Interactivity

If your Business Intelligence reports do not run as expected, or if a Query Studio report has been converted to Reporting, turn off interactivity.

1. From the side panel in Reporting, select the Pages icon, and then select Report.
2. From the application bar, select Show Properties.
The Properties pane appears.
3. From the Run with Full Interactivity drop-down list, select No.