

URGEMS Ad-Hoc Reporting QRC

This Quick Reference Card outlines the fundamentals of creating Ad Hoc reports in IBM Cognos Workspace Advanced. Net ID and Password is required for login at <https://cognos.dw.its.rochester.edu>. Request Access using the [Cognos Access Form](#).

IBM Cognos Workspace Advanced Navigation

Main Menu bar and Toolbars

Use this area to create filters, calculations, print, export reports.

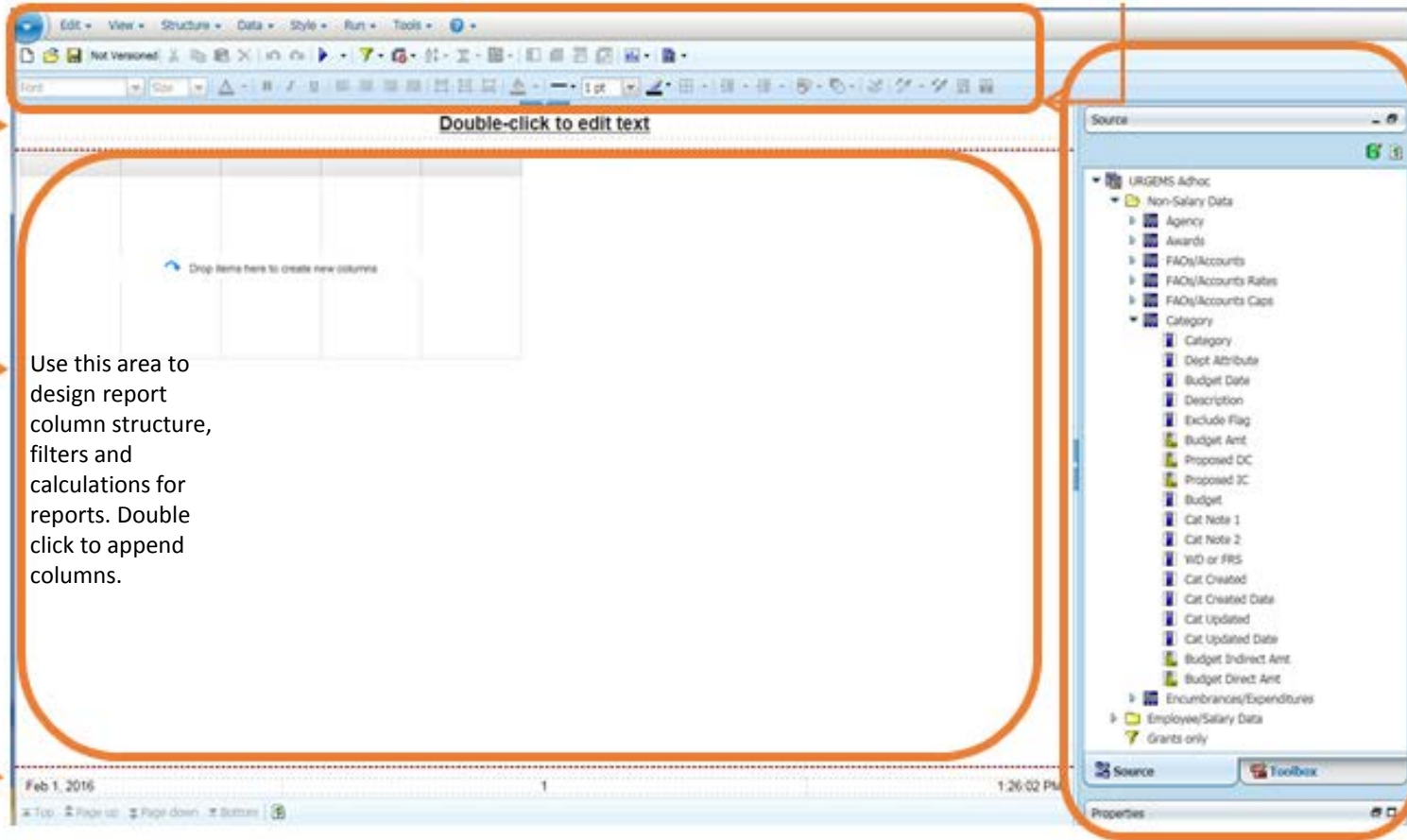
Report Header
Set Report Header by double clicking in area.

Report Build Area

Use this area to design report column structure, filters and calculations for reports. Double click to append columns.

Report Footer

Set Report Footer by double clicking in area.



Source and Toolbox

Select the tab at the bottom to select Source or Toolbox. Once Source is set, use the Toolbox to create the ad hoc report.

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Adding, Moving and Deleting Columns

Adding a Column


1. Log into IBM Cognos Workspace Advanced and navigate to the *Cognos>Public Folders>#URGEMS Ad-Hoc>Packages* folder
2. Create a **New** report and select **List** format
3. Locate the appropriate source object from the Source and Toolbox window pane and *double click* to add to the report build area



Moving a Column


1. Click once in the column to be moved.
2. When the column highlights, click, hold and drag that column to where it should land. Look for the flashing thick line when moving
3. When the flashing thick line is in the desired spot, release the mouse. This is where the column will land.

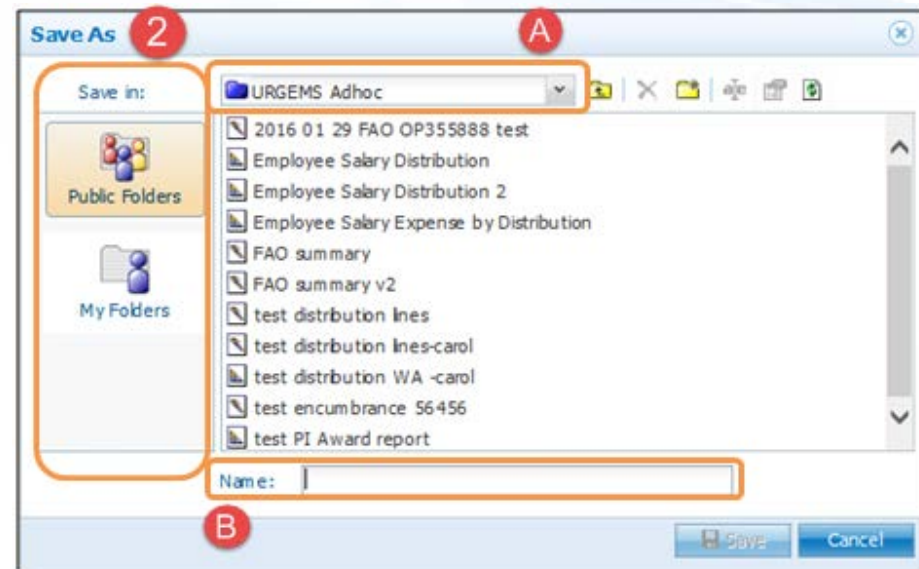
Deleting a Column

1. Click once in the column to delete
2. Go to the main Toolbar at the top of the application window and select the  button to remove the column

Tip: To rename a column, double click on the column title and type in the new name


Saving a Report

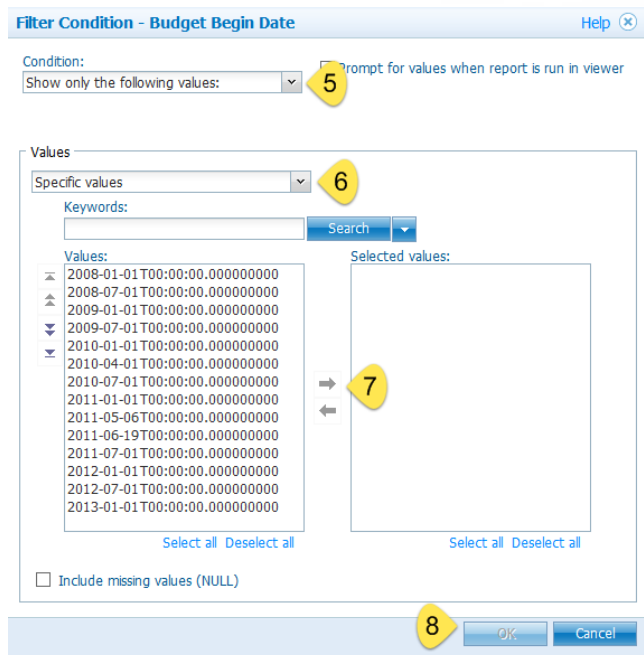
1. Select the “File” icon  from the Main Menu and select **Save As**
2. Within the Save As dialog box, Choose *Public Folders* or *My Folders*. Saving to the *Public Folders* will allow others to use the report, while saving to *My Folders* only the creator will see it. Location options will change upon selection
 - a. If Public folder is chosen, select the appropriate sub folder from the drop down list at the top
 - b. Provide a descriptive report name within the *Name* Field
3. Select **Save** once done



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
Filtering Columns

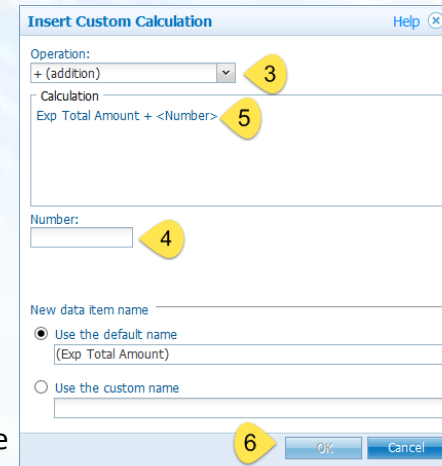
1. Ensure you have run your report at least one time.
2. Select a column title (cell) within the Report Build Area to filter
3. Select the Filter icon from the Main Toolbar 
4. Choose **Create Custom Filter** to access the Filter Condition window
5. Choose the Condition; Show or Do NOT (exclude) show
6. Within the Values section select the **Specific values** option
7. Choose from the Values shown, then select the arrow to bring to the Selected values area for filter
8. Select OK to activate filter



The screenshot shows the 'Filter Condition - Budget Begin Date' dialog box. It has a 'Condition:' section with a dropdown set to 'Show only the following values:' and a yellow callout '5' pointing to it with the text 'prompt for values when report is run in viewer'. Below is the 'Values' section with a dropdown set to 'Specific values' and a yellow callout '6'. There is a 'Keywords:' field with a 'Search' button. A list of dates is shown in the 'Values:' area, with a yellow callout '7' pointing to a right-pointing arrow between the list and the 'Selected values:' area. At the bottom, there are 'Include missing values (NULL)' checkbox, 'OK', and 'Cancel' buttons, with a yellow callout '8' pointing to the 'OK' button.

Creating Calculations

1. Select the column that the calculation will be based on
2. Select the insert calculation icon from the *Main Toolbar*  and choose the **Custom** option
3. From the *Operation* drop down list, select the calculation type
4. Type a number in the *Number* field to add to the column selected
5. Review the calculation created in the *Calculation* section
6. Select OK. This will place the calculation in a separate column on the report



The screenshot shows the 'Insert Custom Calculation' dialog box. It has an 'Operation:' dropdown set to '+ (addition)' with a yellow callout '3'. Below is the 'Calculation' section with the text 'Exp Total Amount + <Number>' and a yellow callout '5'. There is a 'Number:' field with a yellow callout '4'. Below is the 'New data item name' section with a radio button selected for 'Use the default name' and the text '(Exp Total Amount)'. There is also a radio button for 'Use the custom name'. At the bottom, there are 'OK' and 'Cancel' buttons, with a yellow callout '6' pointing to the 'OK' button.

Printing and Exporting Reports

1. Select Run from the Main Menu
2. Choose the type of report to create; PDF, Export to Excel
3. Cognos will build the report in the format selected
4. Select print from within the application launched; Adobe PDF, or Microsoft Excel

Technical Issues Contact:

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URMC: 275-3200 or email HelpDesk_ISD@URMC.rochester.edu