**USING PROMPTS**

Adding prompts to a report adds versatility and interactivity for people who will use your report. A prompt is in essence a question asked of the user that will narrow the results in the report. There are various types and ways to use prompts:

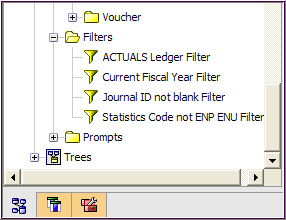
* Add a *Pre-written Prompt* (found **Insertable Objects** in **Prompts** folder)
* Add a simple prompt with a *Filter Expression*
* Add a *Text Box Prompt*
* Add a *Value Prompt*
* Create a *Prompt Page* with a *Cascading Prompt*

**A. Add a Pre-written Prompt for Purpose**

1. Open Report Studio using **UD Financial Data Mart**
2. Click **Create a new report or template**
3. Double-click **List** 
4. Add the following fields to the work area:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject | Folder |
| PURPOSE | Chart of Accounts | Purpose |
| ACCOUNT | Chart of Accounts | Account |
| ACCOUNTING\_DT | Trans Detail |  |
| JOURNAL\_ID | Trans Detail |  |
| TRANS\_DESCRIPTION | Trans Detail |  |
| TRANS\_AMOUNT | Trans Detail |  |

1. Save this report and name it ***Prewritten Prompt***
2. Add the following pre-written Filters (from the **Filters** folder):



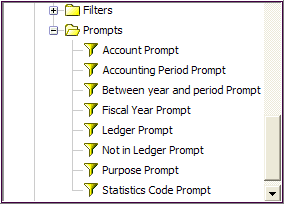
**-ACTUALS Ledger Filter**

**-Current Fiscal Year Filter**

**-Journal ID not blank Filter**

**-Statistics Code not ENP ENU Filter**

1. Add the following pre-written Prompt (from the **Prompts** folder):



**• Purpose Prompt**

1. Save your work
2. Run the report

**B. Add a simple Prompt with a Filter expression**

1. Click on the ACCOUNTING\_DT heading and click **Sort**  and then **Ascending**
2. Add a simple prompt to return dates greater (older) than a date entered
   1. On the toolbar, click **Filters**  and **Add** 
   2. From the **Data Items** tab, double-click **ACCOUNTING\_DT**
   3. Type **>?Acctg Date?**, your expression should look like this:

**[ACCOUNTING\_DT] >?Acctg Date?**

* 1. **Validate**  and click **OK** twice
     + A prompt page will appear with a calendar and a clock
     + Choose a **date** from the prior month, accept the default **time**
     + Enter a **Purpose** and click **OK**

1. **Save** your work
2. **Run** the report

**C. Add a Text Box Prompt to a report page**

1. Click **Open** 
   1. Go to **Public Folders, Ellen Training, Report fpr class**
   2. Double-click on ***class TEXT BOX PROMPT***
2. Immediately save in **My Folders** and name it ***Text Box Prompt***
3. On the toolbar, click **Filters**  and **Add** 
   1. From the **Data Items** tab, double-click **PURPOSE**
   2. Create the expression :

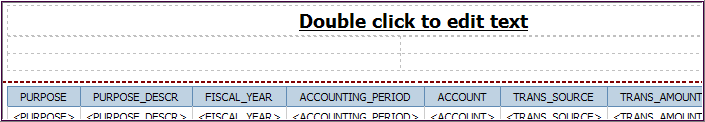
**[PURPOSE]='XXXX000000'** (enter your own Purpose instead of XXXX000000)

* 1. **Validate**  and click **OK**

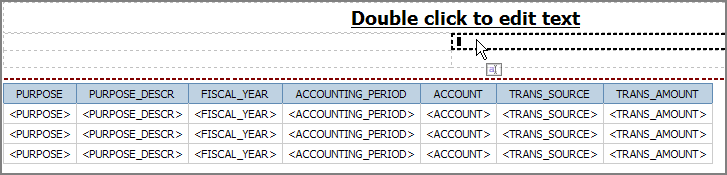
1. Click the  **Toolbox** tab
2. Drag a **Table** to just below the title, you will see a thick, blinking line on the right



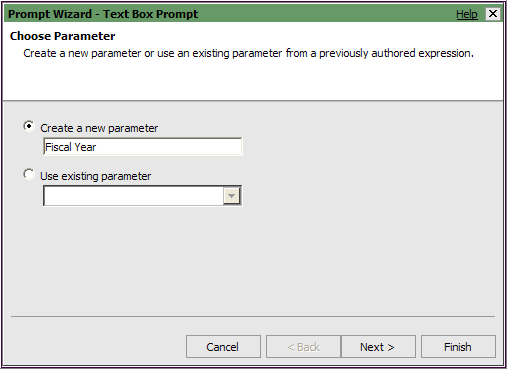
* 1. Make it **2** columns and **2** rows and click **OK**
  2. Your work area should look like this:



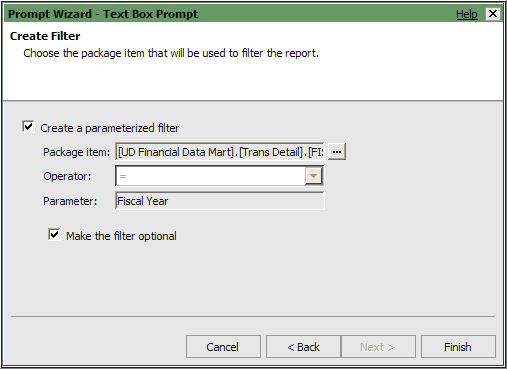
1. Still in the **Toolbox**, drag a  **Text Box Prompt** into the *upper right* table cell



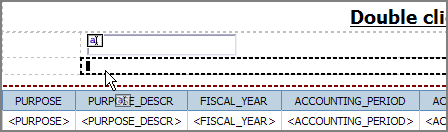
* 1. This will open the **Prompt Wizard**
  2. **Choose Parameter** window:
     + Change **Parameter 1** to **Fiscal Year**
     + Click **Next**



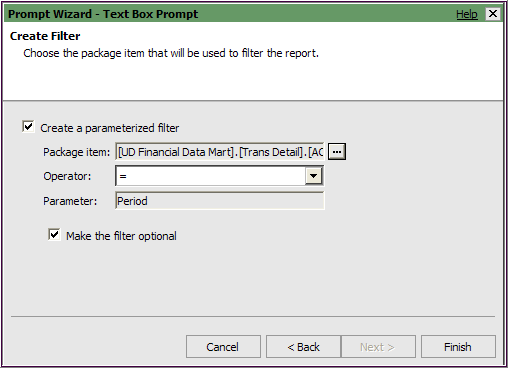
* 1. **Create Filter** window:
     + Click the ellipses 
     + **Package item** - open **UD Financial Data Mart** package/**Trans Detail/Dates** folder, select **FISCAL\_YEAR** and click **OK**
     + Click the **Finish** button



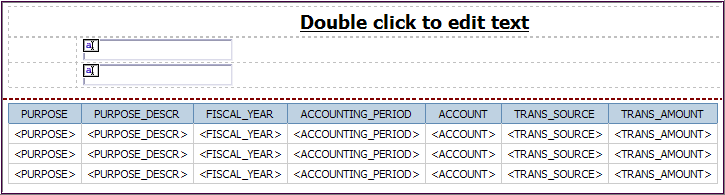
1. Drag another **Text Box Prompt** into the *lower right* table cell



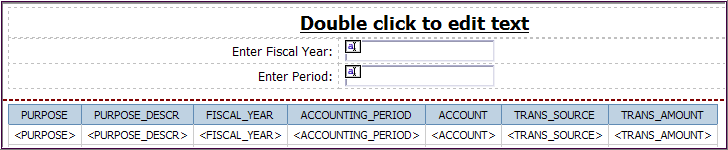
* 1. This will open the **Prompt Wizard**
  2. **Choose Parameter** window:
     + Change **Parameter 1** to **Period**
     + Click **Next** button
  3. **Create Filter** window:
     + Click the ellipses 
     + **Package item** - open **UD Financial Data Mart** package/**Trans Detail/Dates** folder, select **ACCOUNTING\_PERIOD** and click **OK**
     + Make this prompt optional - check the box **Make the filter optional**
     + Click the **Finish** button



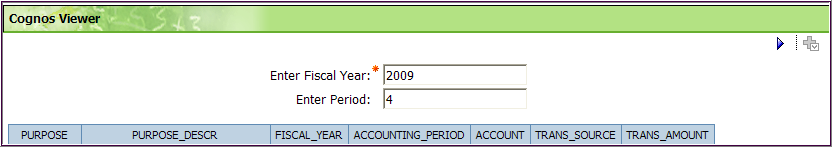
1. Your work area should look like this:



1. Still in **Toolbox**, drag a **Text Item**  to the into the *upper left* table cell
   1. Type – **Enter Fiscal Year:**
2. Drag a **Text Item**  to the into the *lower left* table cell
   1. Type – **Enter Period:**
3. Highlight both left table cells and click the **Right justify** button 
4. Your work area should look like this:



1. **Save** your work
2. **Run ** the report and enter a Fiscal Year in the prompt page
3. When you’ve run the report once, you will be able to change the filters for **Fiscal Year** and **Period** from **Cognos Viewer** to get new results.
   1. Change the values in the Text Box Prompts
   2. Click **Run** 



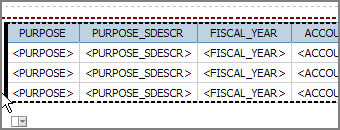
**D. Add a Value Prompt to a report page**

1. Click **Open** 
   1. Go to **Public Folders**, **Ellen Training**
   2. Double-click on ***class VALUE PROMPT***
2. Immediately save in **My Folders** and name it ***Value*** ***Prompt***
3. On the toolbar, click **Filters** 
   1. **Add**  the following filter using the **Data Items** tab:

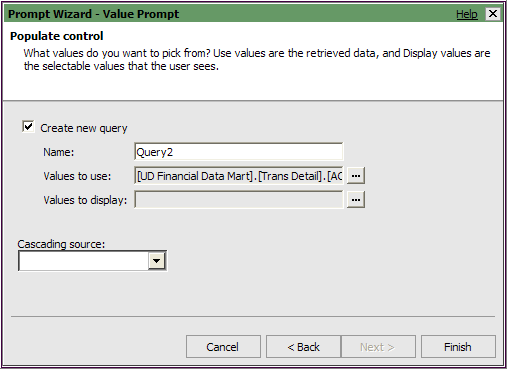
**[PURPOSE]='XXXX000000'** (enter your own Purpose instead of XXXX000000)

* 1. **Validate**  each one and click **OK** (twice)

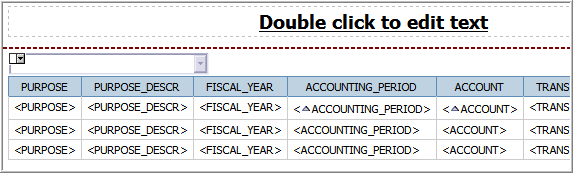
1. Click the **Toolbox** tab and drag a  **Value Prompt** to the ***left*** of list in the work area (look for **thick**, blinking line)



1. This will open the **Prompt Wizard**
2. **Choose Parameter** window:
   * + Change **Parameter 1** to **Period**
     + Click **Next**
3. **Create Filter** window:
   * + **Package Item** - click the ellipses 
     + **Package item** - open **UD Financial Data Mart** package/**Trans Detail/Dates** folder, select **ACCOUNTING\_PERIOD** and click **OK**
     + Make this prompt optional - check the box **Make the filter optional**
     + Click **Next**
4. **Populate control** window:
   * + - **Notice that Create new query** is checked and **Name** is **Query2** – leave both as is
       - Click **Finish**

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* + - Your work area should look like this:



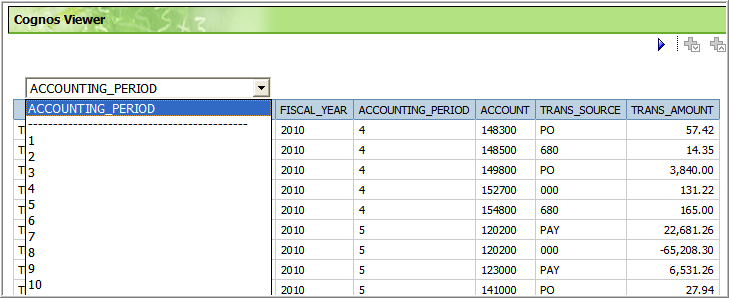
5. In the work area, highlight the **Value Prompt** by clicking on it

1. Go to **Properties** pane
2. Under **General**/**Auto-Submit** – change to **Yes**
   1. Click **ACCOUNTING\_PERIOD** column heading
      * Click **Sort** 
      * Choose **Sort Ascending**

6. **Save** your work

7. **Run** the report

1. When you’ve run the report once, you will be able to change the value for **the Accounting** **Period** from **Cognos Viewer** to get new results.
2. Change the value with the drop-down list in the Value Prompt
3. The report will re-run automatically
4. No need to click Run 



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**E. Create a Prompt Page with a Cascading Prompt**

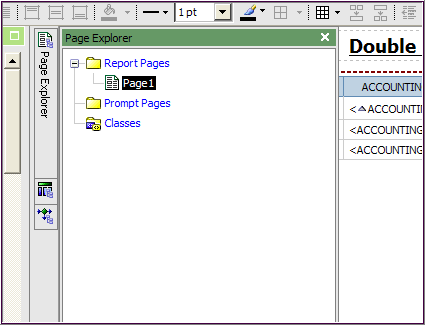
With Cascading Prompts, you create a series of prompts that are hierarchical. When a prompt value is chosen, it determines the values available for the following prompt.

1. Click **Open** 
   1. Go to **Public Folders**, **Ellen Training, Reports for Class**
   2. Double-click on ***class CASCADING PROMPT***
2. Immediately save in **My Folders** and name it ***Cascading*** ***Prompt***
3. On the toolbar, click **Filters** 
   1. **Add**  one filter using the **Data Items** tab

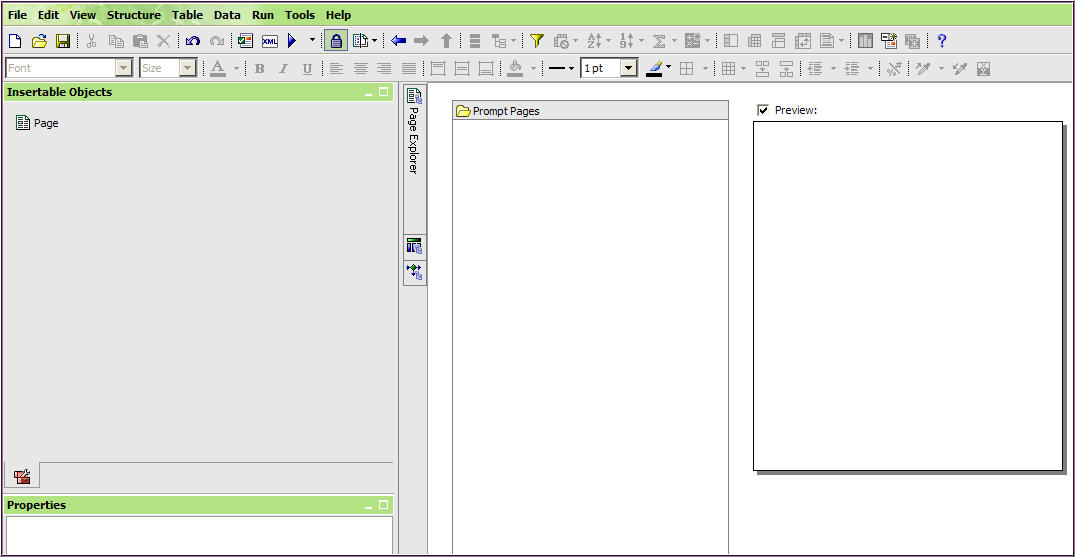
**[PURPOSE]='XXXX000000'** (enter your own Purpose instead of XXXX000000)

* 1. **Validate**  and click **OK**

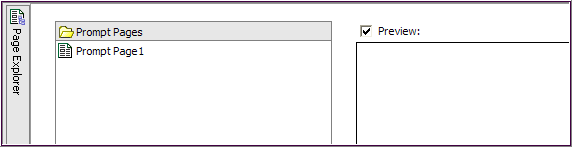
1. Open **Page Explorer**, click **Prompt Pages**



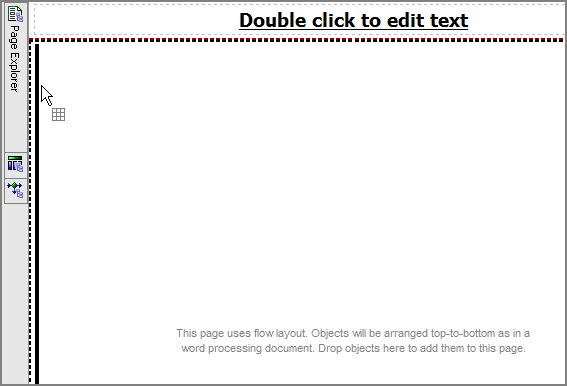
* It will look like this:



1. From **Insertable Objects**, drag  **Page** to the **Prompt Page** pane
2. Double-click **Prompt Page1** to open it (it will create a blank work area)



1. From the **Toolbox** tab, drag a  **Table** into the work area (you’ll see a very long blinking , black line)



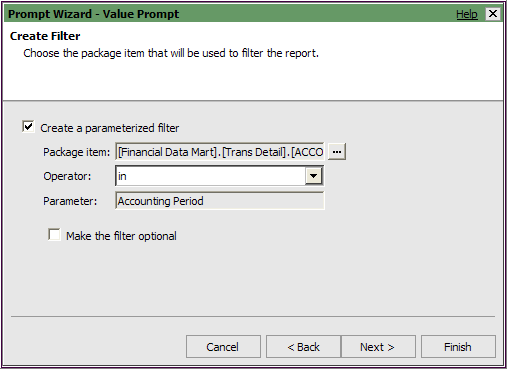
* 1. Enter - Columns **3** and Rows **3** and click **OK**
  2. Upper left table cell – drag a  **Text Item,** type: **Fiscal Year**
  3. Middle left table cell – drag a  **Text Item,** type: **Accounting Period**
  4. Bottom left table cell – drag a  **Text Item,** type: **Trans Source**
  5. Your work area should look like this:

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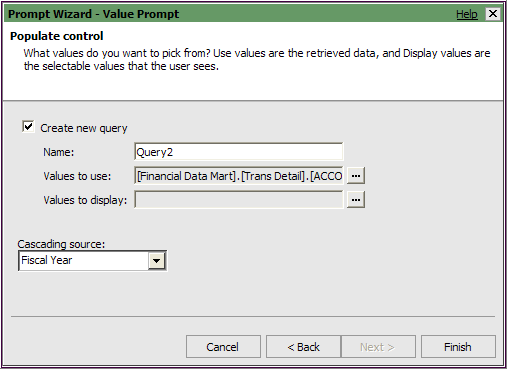
1. Scroll to the bottom of the Toolbox:
2. Drag a  **Text Box Prompt** to the upper center cell; this will open the **Prompt Wizard**



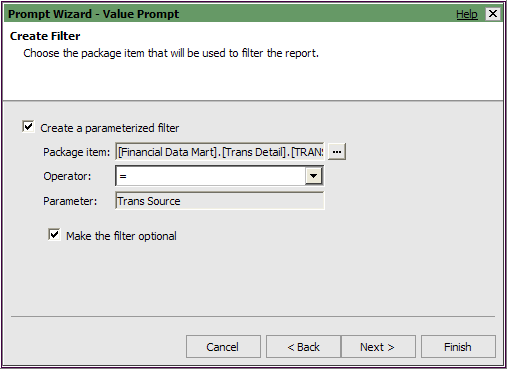
* **Choose Parameter** window:
  + - Change **Parameter 1** to **Fiscal Year**
    - Click **Next**
* **Create Filter** window:
  + - **Package Item** - click the ellipses 
    - **Package item** - open **UD Financial Data Mart** package/**Trans Detail/Dates** folder, select **FISCAL\_YEAR** and click **OK**
    - Click **Finish**
  1. Drag a  **Value Prompt** to the middle center cell; this will open the **Prompt Wizard**
* **Choose Parameter** window:
  + - Change **Parameter 1** to **Accounting** **Period**
    - Click **Next**
* **Create Filter** window:
  + - **Package Item** - click the ellipses 
    - **Package item** - open **UD Financial Data Mart** package/**Trans Detail/Dates** folder, select **ACCOUNTING\_PERIOD** and click **OK**
    - **Operator** – change to **in**
    - Click **Next**



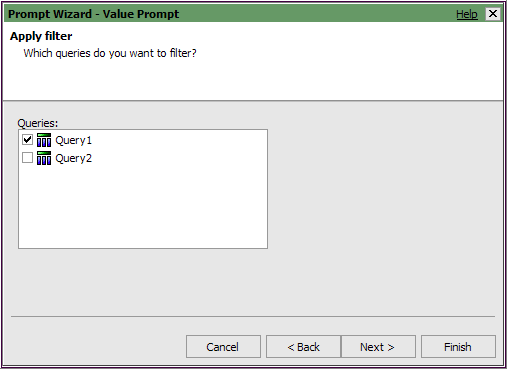
* **Populate control** window:
  + - Note – the prompt will create a new query – **Query2**
    - **Cascading Source** – change to **Fiscal Year**
    - Click the **Finish** button



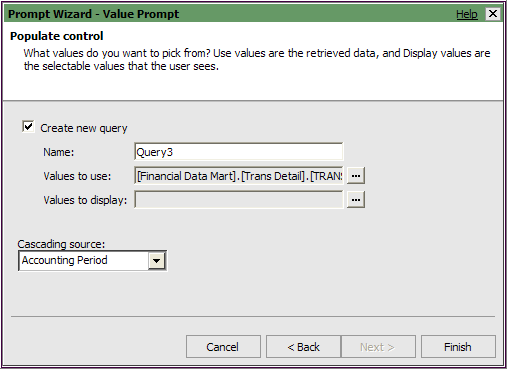
* 1. Drag a  **Value Prompt** to the bottom center cell; this will open the **Prompt Wizard**
* **Choose Parameter** window:
  + - Change **Parameter 1** to **Trans Source**
    - Click **Next**
* **Create Filter** window:
  + - **Package Item** - click the ellipses 
    - **Package item** - open **UD Financial Data Mart** package/**Trans Detail**, select **TRANS\_SOURCE** and click **OK**
    - Click the box for **Make the filter optional**
    - Click **Next**



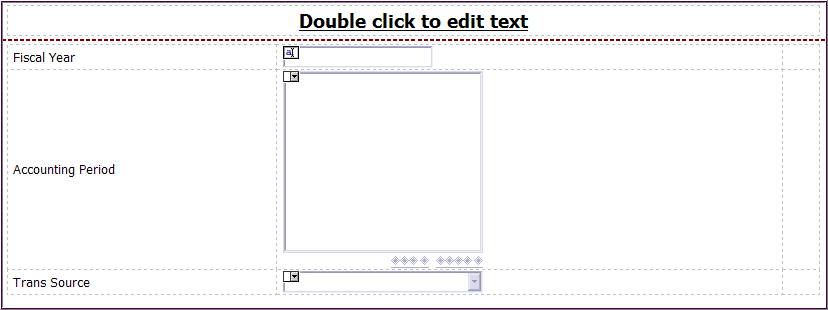
* **Apply Filter** window:
  + - Leave **Query1** checked and click **Next**



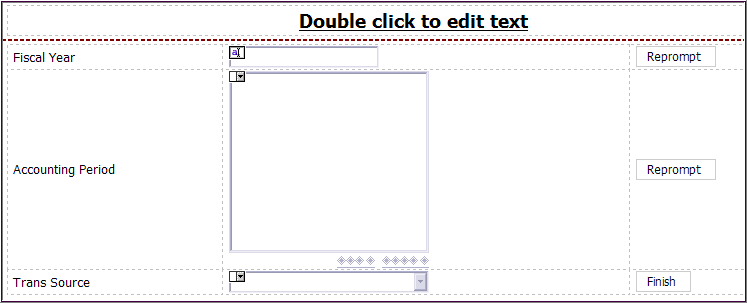
* **Populate control** window:
  + - Note – the prompt will create a new query – **Query3**
    - **Cascading Source** – select **Accounting Period**
    - Click the **Finish** button



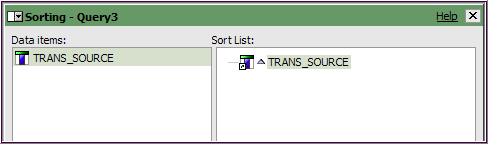
* + - Your work area should look like this:



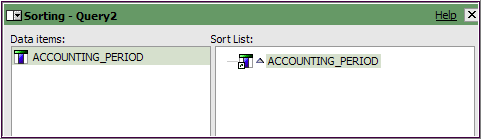
1. From the **Toolbox**, drag a  **Prompt Button** to the upper right cell
   1. It says **Next >**
   2. Click on the button and go to **Properties**
   3. Under **General** category:
      * **Type** – change to **Reprompt**
2. Drag a  **Prompt Button** to the middle right cell
   1. It says **Next >**
   2. Click on the button and go to **Properties**
   3. Under **General** category:
   4. **Type** – change to **Reprompt**
3. Drag a  **Prompt Button** to the bottom right cell
   1. It says **Next >**
   2. Click on the button and go to **Properties**
   3. Under **General** category:
   4. **Type** – change to **Finish**
   5. Your work area should look like this:



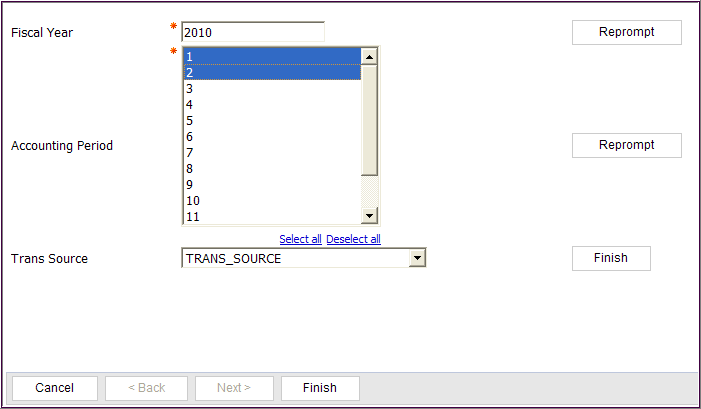
1. Click inside the **TRANS\_SOURCE** prompt box
   1. Go to the **Properties** pane
   2. Under **Data**/**Sorting**, click ellipses 
   3. Double-click **TRANS\_SOURCE** to add it to the **Sort List**
   4. It will sort this prompt list ascending – click **OK**

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1. Click inside the **ACCOUNTING\_PERIOD** prompt box
2. Go to the **Properties** pane
3. Under **Data/Sorting**, click ellipses 
4. Double-click **ACCOUNTING\_PERIOD** to add it to the **Sort List**
5. It will sort the prompt list ascending – click **OK**

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1. **Save** your report and **Run**  it
2. The Prompt Page will appear:
   1. **Fiscal** **Year** prompt – type in an FY such as **2010** and click **Reprompt** button
   2. **Accounting Period prompt** – select a period (or periods) and click **Reprompt** button
   3. **Trans Source** – this is an optional prompt; ***don’t select one the first time***
   4. Click **Finish** button (either one)



1. View your results in **Cognos Viewer**
   1. Note a few **Trans Source** values
   2. Rerun the report from **Cognos Viewer**
   3. Fill all three prompts this time including **Trans Source**