**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**