

SENTURUS

**Weekly Wind Down
Using Prompts & Parameters**

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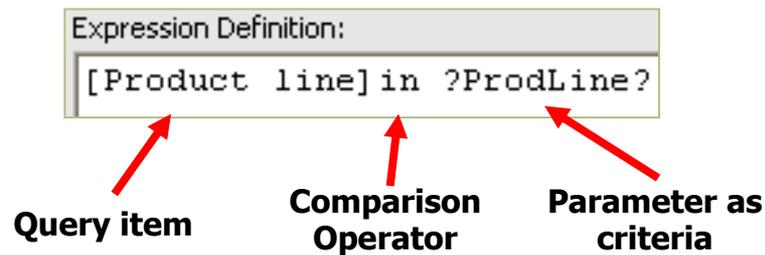
Session Overview

In this week's session we will

- Create dynamically grouped columns
- Use a parameter to control sorting
- Use parameters with conditional blocks
- Create prompt pages
- Create cascading prompts

Parameterized Filter

- Filters that have a parameter in place of the criteria that may be satisfied dynamically by the report consumer
- Can limit the result set returned



Prompt

Provide values for the report you are about to run.

- * Indicates a required field.
- ▶ Points to missing information.

Product line

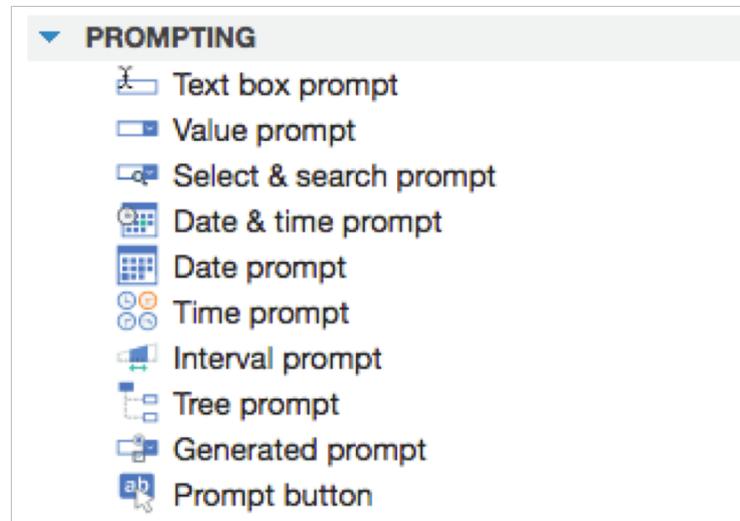
- * Camping Equipment
- Golf Equipment
- Mountaineering Equipment
- Outdoor Protection
- Personal Accessories

[Select all](#) [Deselect all](#)

OK Cancel

Prompt Types

Depending on your data type you can choose from many prompt types



Prompt Types

- Prompts can be placed directly on one of the report pages or on a separate prompt page
- Prompts placed on a report page and set as Optional will not limit the result set initially returned

Retailer Product Report

To limit the list of retailers, please choose a retailer from the following list:

Retailer name Finish

Retailer name	Product line	Product type	Product name	Quantity
Act'N'Up Fitness	Camping Equipment	Lanterns	Firefly Lite	592
			Firefly Mapreader	620
		Packs	Canyon Mule Carryall	470
			Canyon Mule Climber Backpack	252
			Canyon Mule Cooler	134
			Canyon Mule Weekender Backpack	306
	Golf Equipment	Golf Accessories	Course Pro Gloves	428
			Course Pro Golf and Tee Set	606

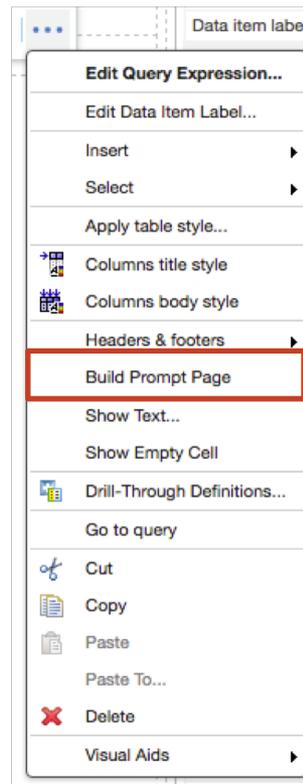
To limit the list of retailers, please choose a retailer from the following list and click "Finish" to run your report.

Retailer name

Cancel < Back Next > Finish

Prompt Pages

- Useful when organizing several prompts for one report
- Can be created using the Build Prompt Page option or manually adding controls to a prompt page



Cascading Prompts

- Cascading prompts allow users to filter the results of a prompt based on the value selected in a previous prompt
- Useful when there are multiple prompts that may lead to no results if the wrong combination of data was selected

Retailer type

- * Department Store
- Direct Marketing
- Equipment Rental Store
- Eyewear Store**
- Golf Shop
- Outdoors Shop
- Sports Store
- Warehouse Store

[Select all](#) [Deselect all](#)

Product line

- * Outdoor Protection
- Personal Accessories**

[Select all](#) [Deselect all](#)

Product type

- * Binoculars
- Eyewear

[Select all](#) [Deselect all](#)

Conditional Formatting

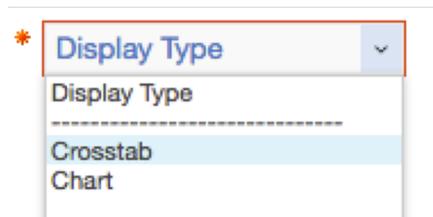
- Variable conditional formatting can also be implemented using conditional blocks
- Conditional blocks provide flexibility to have dynamic report contents based on conditions that we define as the block variable



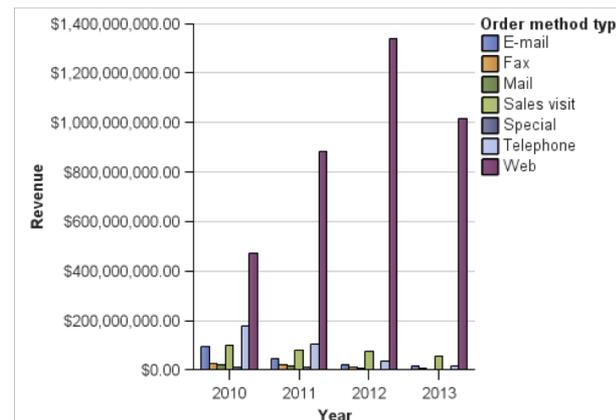
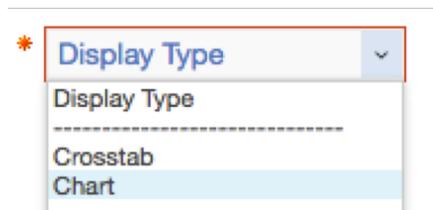
CONDITIONAL	
Conditional styles	
Style variable	
Block variable	
Current block	(Other)

Conditional Formatting

- Using a conditional block it is possible to dynamically hide or show report objects (covered in the [Senturus Advanced Authoring Course](#))



Revenue	2010	2011	2012	2013
E-mail	\$95,402,796.21	\$44,318,886.43	\$23,701,042.57	\$16,420,318.95
Fax	\$28,639,472.14	\$19,896,187.76	\$13,445,559.93	\$8,092,322.18
Mail	\$22,766,850.51	\$16,013,779.49	\$6,905,730.44	\$404,978.53
Sales visit	\$101,072,721.10	\$79,721,524.37	\$73,918,652.38	\$55,481,936.15
Special	\$13,905,918.75	\$10,769,180.34	\$1,006,100.01	\$1,670,121.15
Telephone	\$178,793,580.36	\$107,160,284.09	\$37,199,842.80	\$17,832,073.81
Web	\$473,771,464.65	\$881,315,747.68	\$1,339,714,172.77	\$1,017,434,523.30



Using Parameters

Demo 1-1 Using Parameters for Dynamic Reports

Purpose: In this demo we will use parameters in a variety of ways to make a dynamic report that meets the needs of multiple users. We will use cascading prompts, build a prompt page, make columns dynamic and use a parameter for sorting.

1. Create a new 1 column report. Add the GO sales (query) data source and quick add a List.
2. Click on the toolbox and drag a query calculation to the first column of the list.
3. Name the field GroupColumn and in the expression definition type:

```
IF (?groupParameter? = 'Retailer')  
THEN (
```

4. From the source tab, expand out Sales (query) → Retailers and drag Retailer to the expression definition box and close the parenthesis.
5. Add Else (to the end of the expression and from the source drag over Region from the Retailers query subject and close the parenthesis. Click OK. The final expression should read:

```
IF (?groupParameter? = 'Retailer')  
THEN ([Sales (query)].[Retailers].[Retailer])  
ELSE ([Sales (query)].[Retailers].[Region])
```

Using Parameters

Demo 1-1 Using Parameters for Dynamic Reports

6. Delete the Group Summary row Cognos has created from the list. This can be disabled under Options → Report by unchecking Automatic group and summary behavior for lists.
7. Click on the data tab and return to the source data.
8. Continue populating your list by expanding out Sales (query) → Products and add Product Line, Product Type, Product Number, and Product.
9. From Sales (query) → Sales add Quantity and Revenue to the end of the list.
10. Group the first two columns.
11. We will now add a parameter to control the sorting on our report. Some of our users want to sort by Product Name, while others, Product Number.
12. From the Toolbox → Layout, drag a table onto the white space of the report work area and make it 1 column by 3 rows.
13. Using the three dots in the upper left corner of the list object, select the entire list, and drag it to the third row of the table.
14. From the Toolbox → Prompting, drag a Value prompt into the first row of the table.
15. Create a new Parameter called SortItemParameter and click Next. Clear the checkbox, we do NOT want to Create a parameterized filter and click Next. Clear the checkbox, we do NOT want to Create a new query and click Finish.
16. Select the Value Prompt and click the Static Choices property and click the ellipsis. Click Add and type Product Name for the Use and Display fields. Click OK. Click Add again, and type Product Number in the Use and Display fields. Click OK.

Using Parameters

Demo 1-1 Using Parameters for Dynamic Reports

17. Set the Auto-submit property to Yes.
18. Click the Default Selections property and click the ellipsis. Click Add and type Product Name. Click OK twice.
19. From the Toolbox, drag a Query calculation into the List next to Product. Enter SortItem as the name. Create the following Expression: `if(?SortItemParameter? = 'Product Number') then ([Sales (query)].[Products].[Product number]) else([Sales (query)].[Products].[Product])`. Click OK.
20. Click on any of the List columns. On the Toolbar, click Sort, and select Edit Layout Sorting.
21. From the left pane, drag SortItem on top of the Detail Sort List folder. Click OK.
22. CUT the SortItem column from the List. Remember to cut, not delete, as we want the sort item to stay in our query.
23. Click the new value prompt, go to the Properties pane, scroll down, and click the ellipsis next to Header Text.
24. Click the radio button next to Specified text, then click the ellipsis. Under Default text, type Choose sort order and click OK twice.
25. In the second row of the table, click the quick add plus sign and select Block. In the Properties pane, go to the Size and overflow property. Click the ellipsis. Set both the Width and Height properties to 20px. Click OK. This will add some spacing between our parameter drop down and the list report.

Using Parameters

Demo 1-1 Using Parameters for Dynamic Reports

26. Next we will add a conditional block to our report page and a prompt allowing the user to choose whether or not to show a chart next to the list.
27. Start by clicking the first row in the table and from the on-demand toolbar, click the More ellipsis, Insert → Columns to the right. Click OK to add one additional column
28. Select the two table cells in the middle row and from the on-demand toolbar, click the Merge icon.
29. In the first row, second table cell, drag a value prompt. Create a new parameter called ChartParameter and click Next. Clear the checkbox, we do NOT want to Create a parameterized filter and click Next. Clear the checkbox, we do NOT want to Create a new query and click Finish.
30. Select the Value Prompt and click the Static Choices property and click the ellipsis. Click Add and type Yes for the Use and Display fields. Click OK. Click Add again, and type No in the Use and Display fields. Click OK.
31. Set the Auto-submit property to Yes.
32. Click the Default Selections property and click the ellipsis. Click Add and type No. Click OK twice.
33. Scroll down, and click the ellipsis next to Header Text.
34. Click the radio button next to Specified text, then click the ellipsis. Under Default text, type Show Chart and click OK twice.
35. From the Toolbox → Advanced, drag a Conditional block into the bottom right table cell.

Using Parameters

Demo 1-1 Using Parameters for Dynamic Reports

36. Select the conditional block and go to the Properties pane. Click the ellipsis next to Block variable.
37. Under the Variable dropdown, choose <New boolean variable>. Name the variable ChartVariable and click OK.
38. In the Report expression dialog box, click on the last tab under Available Components, Parameters.
39. Drag ChartParameter to the Expression Definition box and at the end type = 'Yes'. Click OK twice.
40. Under Properties, change the Current block to Yes.
41. From the Toolbox → Data Container drag a Visualization into the Conditional block. Filter for Charts and select any Pie and click OK. Under the Query property, select Query1. Click OK.
42. On the left, click the Data icon, then click Data Items. Drag Revenue to Default measure.
43. From the Source tab, expand out Sales (query) → Sales staff and drag Sales region to the Series.
44. Click the ellipsis next to the Size and overflow property and set both the Width and Height to 600px.
45. We will make sure that both objects line up. Click the two table cells containing the list and the Conditional chart. Make sure it says Table cell under properties. Set the Horizontal alignment to Left and the Vertical alignment to Top.

Using Parameters

Demo 1-1 Using Parameters for Dynamic Reports

46. Our report contains a lot of data. To make it more focused and improve performance, we want narrow down our users choices. We will create a cascading prompt that allows the user to focus on a given set of products based on their choice of Product Line and Product Type. We will also use this opportunity to create a prompt page to clean the report interface up.
47. Click on the Pages tool. Click on the Prompt pages folder, then click the Toolbox icon.
48. From the toolbox, drag a Page item into the Prompt Pages pane.
49. Double-click Prompt page1.
50. Quick add a Table. Set the columns to 7 and the rows to 4. Click OK.
51. Ctrl-click the cells in the bottom row. From the on-demand toolbar, click the Merge button.
52. Select this cell and in the properties pane, set the Horizontal alignment to Center and the Vertical alignment to Middle.
53. From the footer, drag the Cancel and Finish buttons to the table, bottom row. Click the footer and press delete on your keyboard.
54. In row three, column two, click the quick add button and select Block. This will give us spacing between our values.
55. With the block selected, set the Size & overflow property to 20px width and 20px height.
56. From the on-demand toolbar, click the More ellipsis and select Copy.
57. Click in the cell in the third row, fourth column. Select Paste from the on-demand More option.

Using Parameters

Demo 1-1 Using Parameters for Dynamic Reports

58. Repeat this step to paste the block into the cell in the third row, sixth column.
59. Ctrl-click all of the cells in both rows one and two and align them to Left Top.
60. Quick add a text item in row one, column one and type Select Grouping:.
61. Quick add a text item in row one, column three and type Select Product Line:.
62. Quick add a text item in row one, column one and type Select Product Type:.
63. Quick add a text item in row one, column one and type Select Product(s):.
64. Ctrl-click the cells with text items and set the font to 12pt Bold.
65. Now that we have completed our layout, we can add the value prompts.
66. From the Toolbox → Prompting, drag a Value prompt into the cell at row two, column one. Select Use existing parameter and choose GroupParameter. Click Next.
67. Uncheck the Create new query box and click Finish.
68. Select the Value Prompt and click the Static Choices property and click the ellipsis. Click Add and type Retailer for the Use and Display fields. Click OK. Click Add again, and type Region in the Use and Display fields. Click OK.
69. Drag a Value Prompt into the cell at row two, column three.
70. Create a new Parameter called ProductLineParameter and click Next.

Using Parameters

Demo 1-1 Using Parameters for Dynamic Reports

71. Create the parameterized filter by selecting the Package item Product line code from the Sales (query) > Products query subject. Click OK and click Next.
72. Create a new Query called ProductLineParameterQuery. Click the ellipsis next to Values to display and from the Products query subject, select Product Line and click OK. Click Finish.
73. Under properties for the value prompt, set the Auto-submit property to Yes.
74. Drag a second value prompt into the cell at row two, column five.
75. Name this parameter ProductTypeParameter and click Next.
76. Click the ellipsis next to package item and from the Products query subject, click Product type code and click OK. Click Next.
77. Click Next again to accept the query selection dialog.
78. Name the new query ProductTypeParameterQuery.
79. Click the ellipsis next to Values to display and from the Products query subject, select Product type.
80. In the Cascading source: dropdown, select ProductLineParameter and click Finish.
81. Set the auto-submit property to Yes for this new value prompt.
82. From the toolbox, drag a Value Prompt into the cell at row two, column seven.

Using Parameters

Demo 1-1 Using Parameters for Dynamic Reports

83. Create a new Parameter called ProductParameter and click Next.
84. Select Product number as the Package item, change the Operator to in click the checkbox to Make the filter optional, and click Next.
85. Make sure the checkbox is only on Query1 and click Next.
86. Create a new Query called ProductParameterQuery. Under Values to display, select Product from the Products query subject.
87. From the Cascading source: dropdown, select ProductTypeParameter and click Finish.
88. Under Properties, click the Select UI property and change it from a List box to Check box group.
89. Run the report as HTML.

Using Parameters

Demo 1-1 Results

Select Grouping: • Retailer
Select Product Line: • Mountaineering Equipmer
Select Product Type: • Rope
Select Product(s):
 Husky Rope 100
 Husky Rope 200
 Husky Rope 50
 Husky Rope 60

[Select all](#) [Deselect all](#)

