**Basic Report Writing Financial Data Mart (FDM) -** **Repeater Tables **

Repeaters are tables in which you can insert items that are repeated in a particular order when you run the report. Examples are mailing lists and name badges.

Cognos-DEV – <https://cognos-dev.udel.edu/cognos8>

Cognos (production) - <https://cognos.udel.edu/cognos8>

* Login with your **UDelNet ID** and **password**
* Under My Actions, choose  **Create professional reports (Report Studio)**



Navigate to the yellow content folder **FDM packages**, click on name



Click on **UOD Financial Data Mart** package (blue folder)

This will launch **Report Studio**

**There are at least three ways to create a Repeater Table:**

1. Convert a List report to a Repeater (easier)
2. Create a new reportand select **Repeater** icon  (harder, time-consuming)
3. Add a Repeater to a report, such as a List
4. **Convert a List report to a Repeater**
5. Open **UD Financial Data Mart**



1. Create a list with these fields:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| SPEEDTYPE\_KEY | Chart of Accounts | Speedtype |
| SpeedType CHARTFIELD1  | Chart of Accounts | Speedtype |
| PURPOSE DESCR | Chart of Accounts | Purpose |
| FUND\_TYPE\_GROUP | Chart of Accounts | Purpose |
| PURPOSE\_CURRNT\_FLG | Chart of Accounts | Purpose |
| DEPTID1 | Chart of Accounts | Speedtype |
| FUND\_CODE1 | Chart of Accounts | Speedtype |
| PROGRAM\_CODE1 | Chart of Accounts | Speedtype |
| Speedtype CHARTFIELD2 | Chart of Accounts | Speedtype |
| PROJECT\_ID1 | Chart of Accounts | Speedtype |

1. Add the pre-written prompt for **Purpose**
2. **Run**  the report
3. Add a **Filter**  to only return data for the *current* Purpose description
	* **Add** 
	* Click the **Data Items**  tab when the window pops up
	* Double-click PURPOSE\_CURRNT\_FLG to addit to the expression
	* Then type: **=’C’**
	* The expression should look like this:



* **Validate**  it and then click **OK** twice
1. **Run**  the report again
	* Notice there are no historical rows, where the PURPOSE\_CURRNT\_FLG is an **H**
2. Click any part of the list
3. From the **Structure** menu, click **Convert List to Repeater**



1. The work area now displays a Repeater Table
	* Click just inside the repeater box until the whole thing is shaded



Click here

1. Next, we’ll set the “repeat” pattern
	* At the top of the **Properties** pane, click **Select Ancestor**  button
	* Click **Repeater Table**



* + In Properties, under **General**, click **Across** and change number to **3**
	+ And change **Down** to **2**

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* The work area will look like this:



1. **Save**  the report in **My Folders** and name it ***Repeater from List***
2. **Run** the report 
	* For best results, run this report with a Purpose that has multiple Speedtypes for one Purpose, such as a Basic Budget code in an academic department (e.g. CHEM110000)
3. **Create a new  report and select Repeater icon** 
	1. The New window appears, double-click on **Repeater Table** 



* 1. In the Work Area, click where it says “Drop items here…”



* 1. At the top of the **Properties** pane, click **Select Ancestor**  button
		+ Click **Repeater Table**



1. In **Properties** set the properties of the repeater:
	* + Under **General**, click **Across:** change to **4** and click **Down:** keep **3**

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* + - Under **Positioning,** double-click **Table Properties**
		- Check **Fixed size** and click **OK**

 

1. Add five blocks which will hold five fields
* Click on the **Toolbox**  tab
* Click on  **Block** and drag it into where it says “Drop items here…”



Drop the block when you see the thick, blinking line

* You will see 12 new blocks (4 across, 3 down), one in each **table cell**
* Drag another **Block** to the top left table cell – carefully drop it when a thick black, blinking line appears as shown below:

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HINT – if you accidentally drop a block in the wrong place, use Undo  button.

* Continue to drag & drop 3 more **Blocks** for a total of 5 in each table cell
* Your work area should look like this:

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This is one repeater table

1. **Save** the report in **My Folders** and name it ***Repeater from scratch***
2. In **Insertable Objects**, **Source** tab , expand **UOD Labor Distrib Mart**
3. Add the following five fields to the upper left table cell; click & drag one field *into* each of the five blocks:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| EMPLID | LAM | Employee |
| NAME  | LAM | Employee |
| CUR\_DEPT\_LDESCR | LAM | Employee |
| CUR\_DEPTID | LAM | Employee |
| CUR\_JOBCODE\_LDESCR | LAM | Employee |

1. Your work area should look like this (partial view):



1. Add a prompt for Department ID
	* Click anywhere in one of the table cells and click **Filter** 
	* Click **Add **
	* Click the **Data Items** tab 
	* Double-click **CUR\_DEPTID** to add it to the expression
	* Type - **= ?Department?**



* + **Validate**  the expression
	+ If there are “no errors”, click **OK**
1. Add a border around each table cell
	* Click any table cell in the work area
	* In the **Properties** pane, click the **Ancestor**  button
	* Choose **Repeater Table Cell**
	* Under **Box**, double-click **Border**
	* Choose any **Color, Style** and **Width**
	* Click the **Border**  button and click **OK**
2. **Save**  your work
3. **Run** the report 

**3. Add a Repeater Table to a List**

1. Create a new **List**:
	1. Open **Report Studio** using the package **UOD LAM Data Mart** (in FDM Packages)
	2. Add these fields from the **LAM** query subject, **Employee** folder:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| EMPLID  | LAM | Employee |
| NAME | LAM | Employee |

1. From the **Toolbox** tab, drag a **Repeater Table** to the right of NAME (look for long *thin* blinking line)
2. Click on the **Repeater Table** in the work area



1. In **Properties**:
	1. Click the **Ancestor** button and choose **Repeater Table**
	2. **Data/Query** - change **Query** **2** to **Query 1 – *very important!!***
	3. **General/Across** – change to **3**
	4. **General/Down** – change to **4**
2. From the **Toolbox** tab, drag a **Table** into the top portion of the Repeater Table



* 1. Insert Table – enter **3** (columns) and **8** (rows)
1. From the **Source** tab, drag the following 8 fields to the table, starting with the top, *right* cell:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| SPEEDTYPE\_KEY  | LAM |  |
| PROGRAM\_CODE | Chart of Accounts | Program |
| LASTUPDDTTM | LAM |  |
| PERCENTAGE | LAM |  |
| UODLABDST\_VLD\_FRM\_DT | LAM |  |
| UODLABDST\_VLD\_TO\_DT | LAM |  |
| CUR\_DEPTID | LAM | Employee |
| CUR\_DEPT\_LDESCR | LAM | Employee |



This is a partial view of what your work area will look like:



1. Add descriptions to the Repeater Table in the *left* cells
	1. From the **Toolbox** tab, drag a **Text Item** to the Table for *each* field
	2. Type the descriptions as shown below:



1. Save the report in My Folders as **Repeater LAM List – 5G**
2. Click **Filters** and add these three:
	1. [SPEEDTYPE\_KEY] > ‘ ‘ (This means: show any speedtype greater than blank; your report will exclude LAM rows with no Speedtype.)
	2. [UOD Labor Distrib Data Mart].[LAM].[UODLABDST\_CURRNT\_FLG]='C'

 (This means your report will only show the *current* LAM distribution line or lines. The other value for this field is H for historical data.)

* 1. [CUR\_DEPTID]=?dept? (This is a prompt for department id.)
1. Save the report
2. Run the report
3. Add some space between the descriptions and the data fields
	1. From the **Toolbox** tab Drag a **Text Item** to the top, middle cell
	2. Type: [space] [space]
	3. You only have to do this to one cell



1. Add formatting to the Repeater Table
	1. In the work area, click the Repeater Table until the **Properties** pane says **Repeater Table Cell**
	2. In Properties, go to **Box**/**Border**, click the ellipses 
		* Select a **Color**, **Style** and **Width** according to your taste
		* Click the square box  and the **OK** button
	3. Go to **Color & Background**/**Background Color**, click the ellipses 
		* Select a *light* color that will work with your border color
2. Save
3. Run the report
4. Adjust the formatting colors (if needed)