

# Human Capital Analytics Ad Hoc Reporting (Cognos 11.2.4) Quick Start Guide



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# HCA Reporting

HCA Reporting is the portal to iCON reporting and is based on IBM Cognos Analytics software. A user can use the tool to run reports and dashboards, author ad hoc reports, distribute and schedule reports.

You must have Manager Services function security to HCA Reporting in order the run reports.

This is a quick start document. To see a more complete set of documentation see the full UnicornHRO Human Capital Analytics User Guide.

## Launch

In Manager Services, start HCA Reporting by clicking the HCA Reporting tile or navigate to the Tools > HCA Reporting menu item.



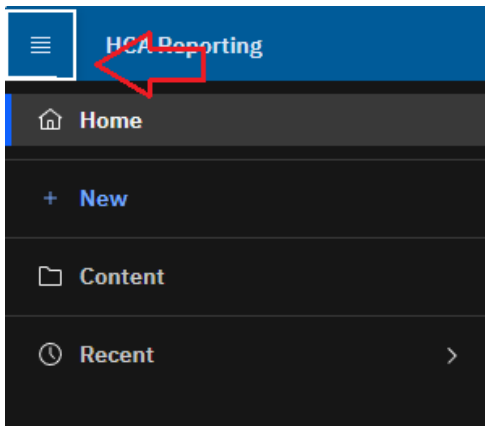
## Layout

The **Application Bar** runs along the top. It provides access to Help, personal menus including Schedules and Sign Out as well as a view switcher.

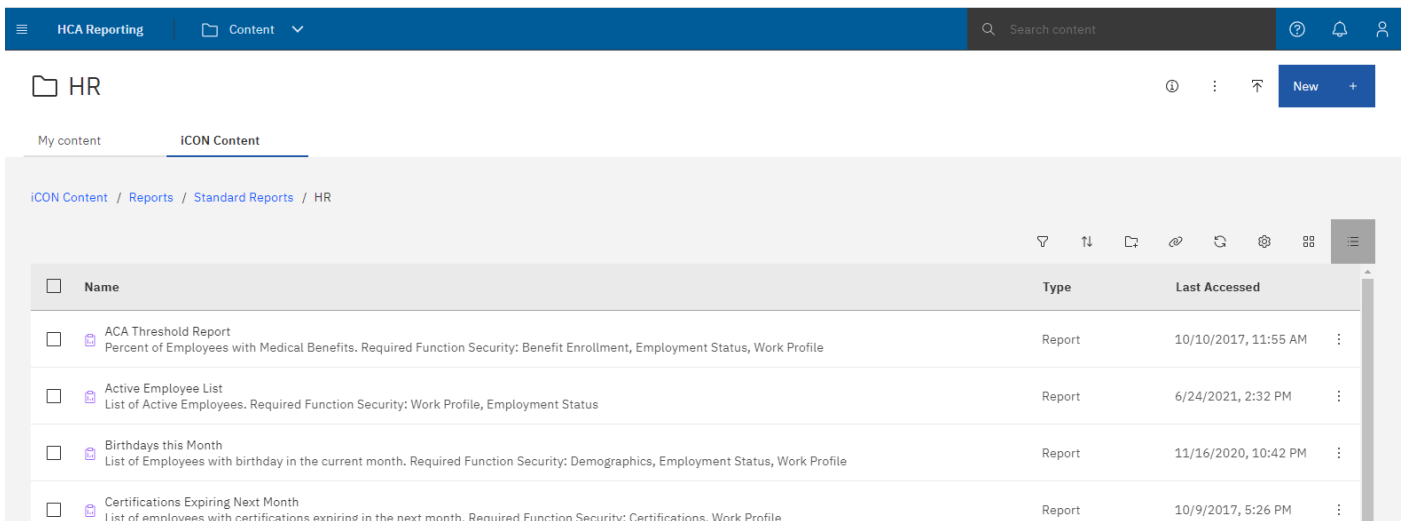
The **Content View** by default shows your recently run reports.

<input type="checkbox"/>	Name	Location	Type	Last Accessed
<input type="checkbox"/>	Birthdays this Month	Team content > iCON Content > Reports > Standard Report...	Report	12/29/2022, 5:15 PM
<input type="checkbox"/>	Employee List - MF	My content	Report	12/29/2022, 5:14 PM
<input type="checkbox"/>	HR Dashboard	Team content > iCON Content > Reports > Standard Dashb...	Dashboard	12/29/2022, 5:14 PM
<input type="checkbox"/>	Payroll Dashboard by Check Date	Team content > iCON Content > Reports > Standard Dashb...	Dashboard	2/2/2022, 10:34 AM

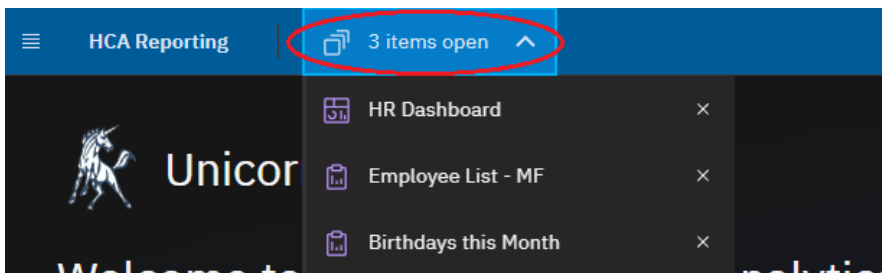
The **Open Menu** provides access to exiting content, creating new reports or to see recently run reports. You can navigate with in your personal My Content folder or navigate thru Shared content from here.



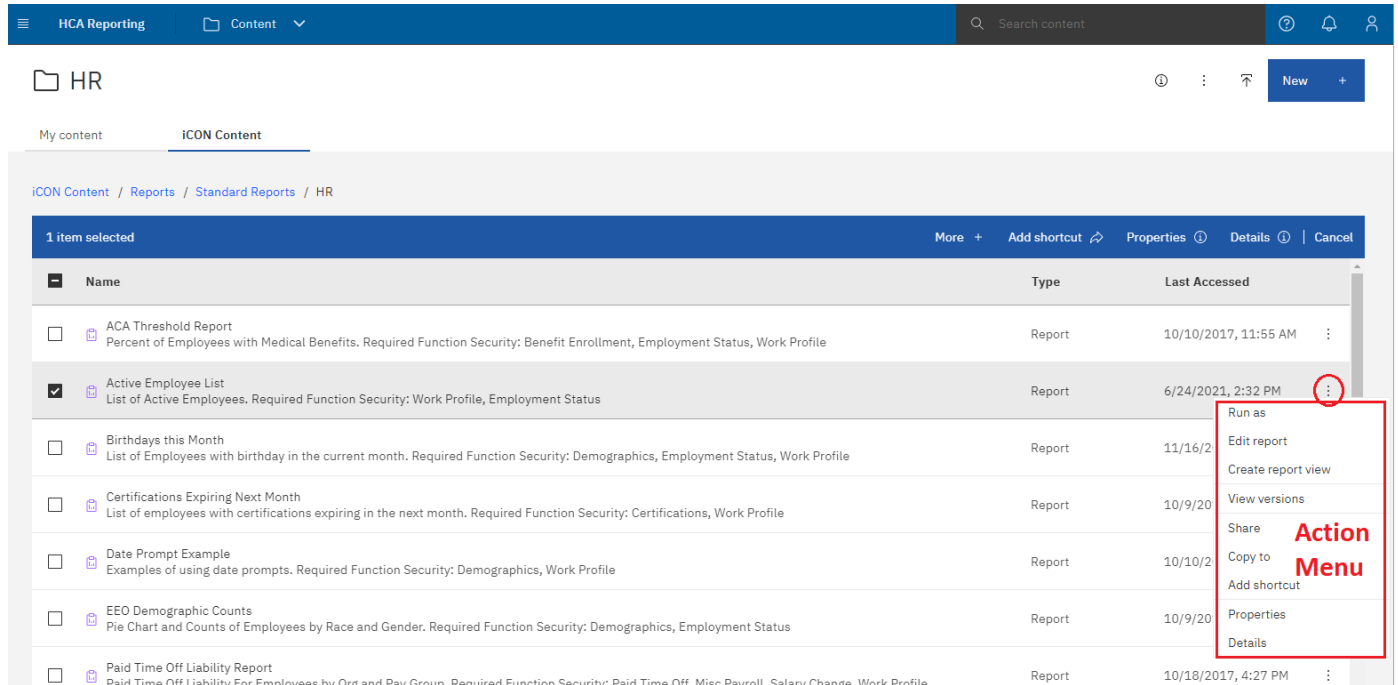
The **Content** menu item opens the **Content View** where you can navigate between your existing personal content in the “My Content” folder and shared and standard content under “iCON Content”. The Context Menu may display Folders or Reports, depending on what is selected. The top line of the Context Menu provides a trail for navigating around the folder hierarchy.



**Tip:** If you have several reports open you can use the View Switcher drop down in the Application Bar to navigate between open reports and dashboards.

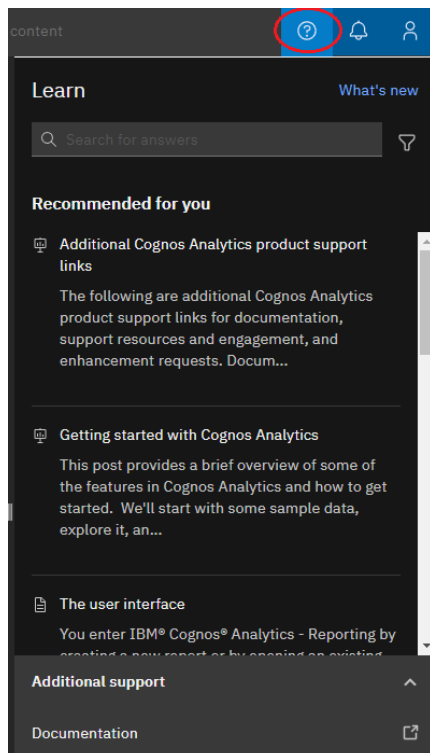


The **Action Menu** is a flyout menu that provides access to features that are relevant to the selected item. The available items will be different depending on the user's security rights or the object selected.



## Help

Help is available in the Learn section in the upper right corner of the application.



## Finding reports

Reports will be available in 3 possible locations.

My Content – this folder is visible only to the user. Reports saved here will only be available to the current user.

Customer Shared Folder – this folder is visible to all user for the customer. This folder will be in this location: Team Content > iCON Content > Reports > Customer Folder > {customer number} > Shared.

Cognos Group folder – this folder is visible to only users defined in a Security Group. Groups and memberships are defined in the HCA Security function. These folder locations will be: Team Content > iCON Content > Reports > Customer Folder > {customer number} > Groups > {group name}.

You can use **Search** to find reports by Name. The “Search content” box is on the right side of the Application Bar. The search will return a list of objects and their location. You can use the filter icon to further refine your results.

The screenshot shows the HCA Reporting application interface. At the top, there is a blue navigation bar with the text "HCA Reporting" and a search box labeled "Search content" which is circled in red. Below the navigation bar, the main content area displays "Showing results for 'HR dashboard'" with a "Close" button and a "Save search" button. Underneath, it says "Search results in: All Content". The main area shows "Showing 29 items" and a table of search results. A filter panel is open on the right side of the table, showing options for "Type" (Folders, Data, Packages, Dashboards, Explorations, Notebooks, Stories, Reports, Report Views, Jobs, Shortcuts, Other) and "Modified" (All, Today, Yesterday, Past week, Past month). The "Result limit" is set to 50.

Name	Location	Type
<input type="checkbox"/> HR Dashboard	Team content > iCON Content > Reports > Standard Dashbo...	Dash
<input type="checkbox"/> My HR Dashboard	My content > Homepage	Dash
<input type="checkbox"/> HR Dashboard Drill Test	My content > Homepage	Dash
<input type="checkbox"/> HR Dashboard Drill Test	Team content > iCON Content > Reports > Customer Folder...	Dash
<input type="checkbox"/> HCA_HR DashBoard 202174	Team content > iCON Content > Reports > Customer Folder...	Dash
<input type="checkbox"/> Customer churn information by zip code This sample report is the drill-through target report for sample dashboard 'Telco churn' and...	Team content > Samples > By industry > Telecommunicatio...	Repo
<input type="checkbox"/> Hospital admissions exec... This sample dashboard displays executive-level information ab...	Team content > Samples > By industry > Healthcare > Dash...	Dash

Recently run reports will be listed on the Portal homepage. Recently run reports are also available under the **Recent** items entry on the navigation bar.

## Viewing and interacting with reports

Navigate to a report or search and find a report in the **Recent**, **Shared**, **Groups** or **My content** folder, you can then click on the report name to run the report.

The report opens in a viewer. When a report runs in the interactive viewer, you also have options to see different data in the report by filtering, drilling up and down, and more.


Or from the entry context menu , click **Run as**. You can then choose the output format.

The report opens in a viewer. When a report runs in the interactive viewer, you also have options to see different data in the report by filtering, drilling up and down, and more.

Or from the entry context menu , click **Run as**. You can then choose the output format.


## Copying or moving reports

When you create a copy of an entry, you create a replica of that entry in another location in the portal. When you move an entry, you remove it from the current folder and place it in another folder. When you copy and move entries, the IDs and links are either maintained or overwritten. You must have read permissions for the entry that you are attempting to copy or move. You must also have permissions for the current folder, and write permissions for the target folder.


1. Navigate to the report. From the entry context menu , click **Copy or move**.
2. Locate the target folder, and click **Copy to**.

## Setting the package for a report


If you copy a report to a new environment you may need to set the package associated with the report to the customer number currently logged into. An example is copying a report from Live to Test.

1. Navigate to the report. From the entry context menu , click **Properties**.
2. Under General > Advanced, Use the “Set” link under “Source Package or data module” to change the Source Package. Select the package for the customer currently logged into. See [Selecting a Package](#).

## Renaming a report

1. Navigate to the report. From the entry context menu , click **Properties**.
2. Click the report name field at the top of the Properties pane. This will place the cursor in the name field, edit the name as desired.


## Share your content by email

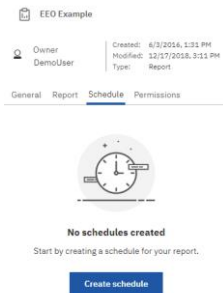
You can share Cognos® Analytics content in an email. When you are viewing your content, click the Share button .

## Scheduling an entry

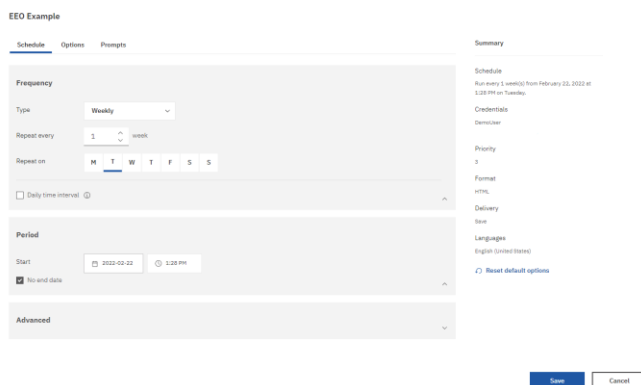
You schedule an entry, such as a report, to run it later or at a recurring date and time.

Only one schedule can be associated with each entry. If you require multiple schedules for a report, you can create report views, and then create a schedule for each view.

1. Click the entry context menu , and then click **Properties**.
2. In the **Properties** pane, click the **Schedule** tab, and then click **Create Schedule**.



3. In the **Create schedule** pane, specify the frequency, options & saved prompt values (if required). Set up any email recipients under the Options tab > “Send report by email” > “edit details”.






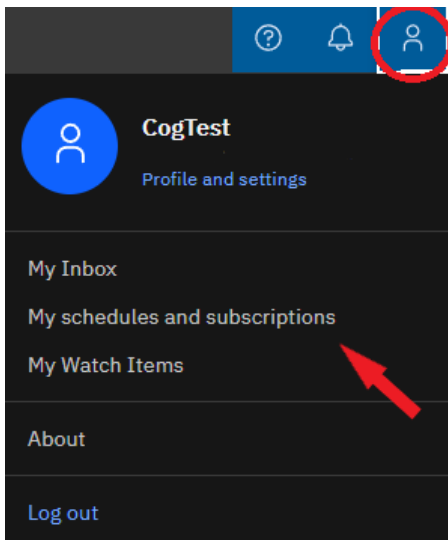
# My schedules and subscriptions



You can view all your scheduled activities and subscriptions on the **My schedules and subscriptions** panel.

You can view a list of your scheduled activities that are current, past, or upcoming on a specific day. You can filter the list so that only the entries that you want appear. A bar chart shows you an overview of daily activities, by hour. If you switch views, you must refresh to see current data. For example, if you switch from **Past Activities** to **Upcoming Activities**, you must refresh to see current data in the panes.

You can see the **My schedules and subscriptions** option in the Personal menu .

1. In the application bar, click your user name  icon , and then click **My schedules and subscriptions**.



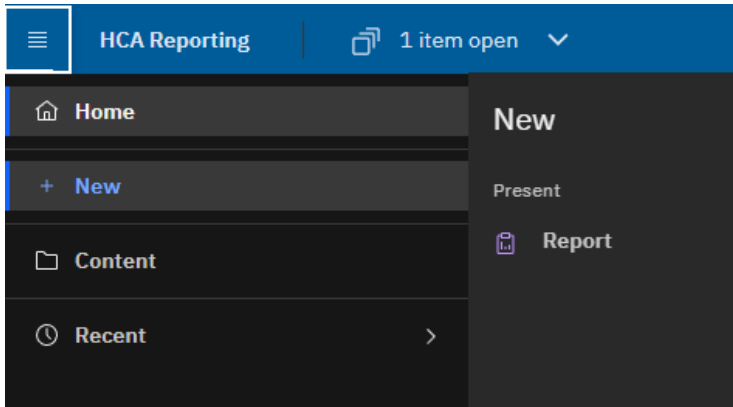
2. To see both a listing and a graph of your schedules and subscriptions for a specific time frame, click the Type button  and then click **Upcoming**, **Past**, or **Current**.
3. To perform actions on a schedule or subscription in the list, click the More button  next to the list item, and then click an action.

# HCA Author

You must have function security to HCA Author in order the create or edit reports.

## Creating a report

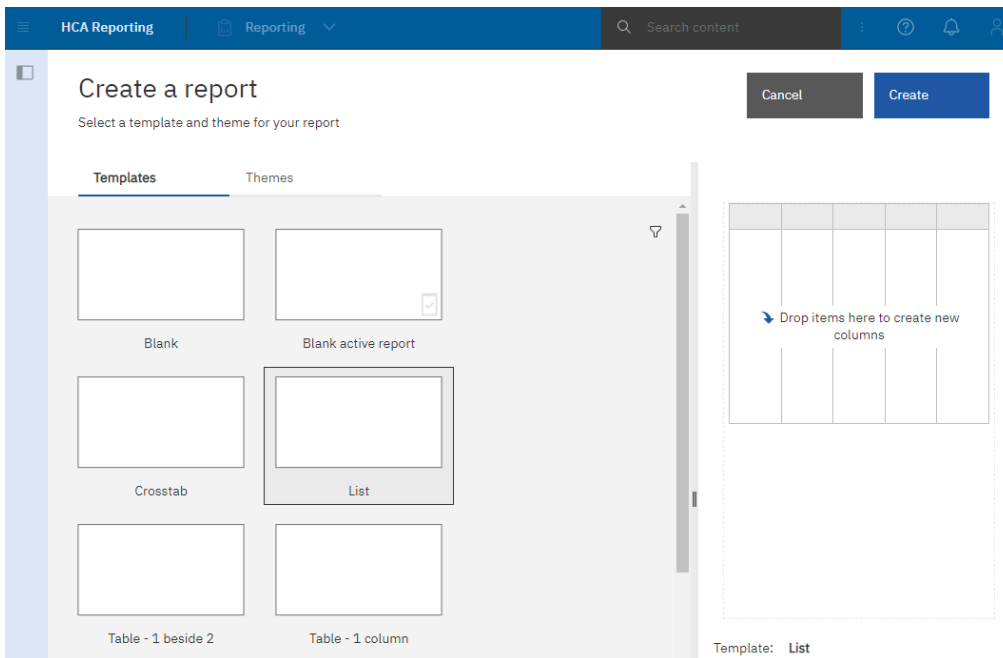
Create a report by clicking the **Open Menu** in the HCA Reporting portal, select **+ New** and then clicking **Report**.



## Templates and themes



IBM Cognos Analytics includes several basic report templates and color themes that you can choose from when you create a new report.

**Hint:** Selecting the “List” template will give you a template similar to prior versions of Cognos.

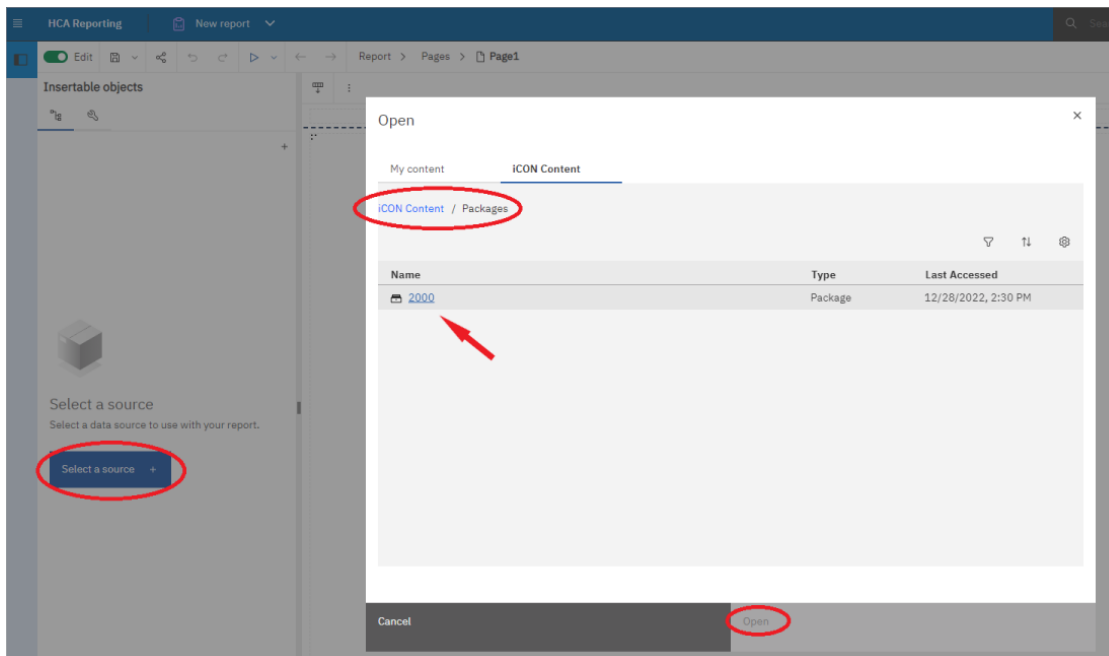


## Selecting a package

Add data to a report by loading packages in IBM Cognos Analytics - Reporting.


1. Click the **Sources** icon .
2. Click the **Add report data** icon  or the **Select a source** button.
3. Select the package that you want.

Look for a package matching your customer number in the iCON Content > Packages folder. Browse to iCON Content > Packages, select the package, then click **Open**.

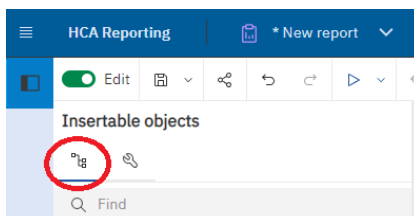


## Insertable objects

### Sources tab

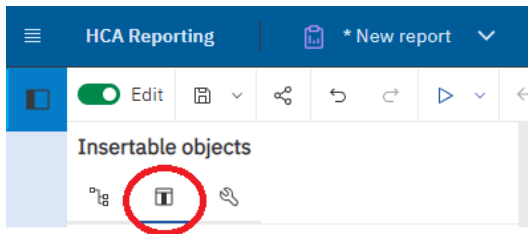
The **Sources** tab  contains items from the package selected for the report, such as data items and calculations.

Search through the sources by typing a value in the **Find** field. As you type, the items that match your search string appear in the tab.




## Data Items tab




The **Data Items** tab  shows the queries in the report.




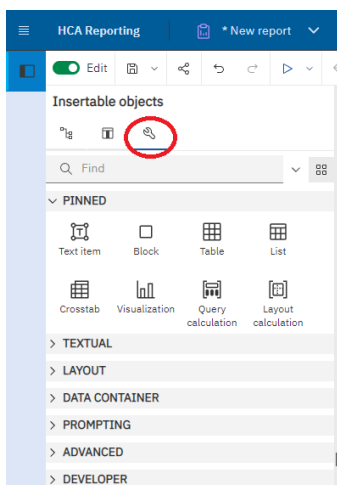
## Toolbox tab

The **Toolbox** tab  contains various objects that you can add to a report, such as visualizations, text, layout objects, and prompts. You can also add advanced objects such as custom controls and hyperlinks. Depending on the type of object, you can drag it from the Toolbox to the canvas or double-click it to open a window in which you define values for the object. When the object is placed on the canvas, its properties are displayed in the **Properties** pane.

Search through the objects by typing a value in the **Find** field. As you type, the items that match your search string appear in the tab.

Toolbox items are organized into groups. Click  to show all of the items available in each group or  to collapse the groups. Click  to toggle between a list view or a tree view of the items in the groups.


Add items that you use often to the **PINNED** group. Items in the **PINNED** group appear in the Add circular menu icon  on the canvas when you create a new report. To add a toolbox item to the **PINNED** group, right-click the item and click **Add to pinned toolbox items**. To remove an item from the **PINNED** group, right-click the item and click **Remove from pinned toolbox items**.




Tip: You can use a Query Calculation from the toolbox to create a new column in a List report.



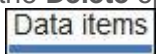
## Add relational data to a report

Select the data items to appear in the report.

1. From the **Source** tab , drag each query item to the report.

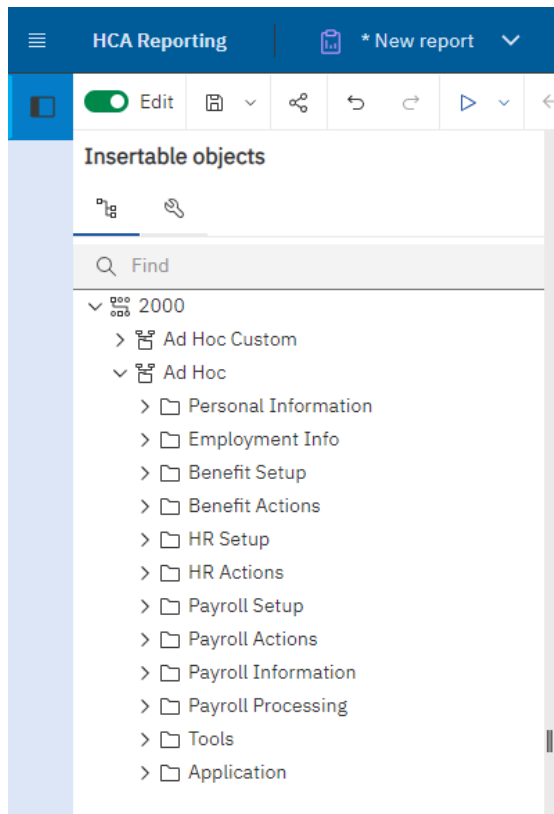
**Note:** A flashing black bar indicates where you can drop an item. Items inserted in the report appear on the **Data Items** tab .

Other ways to select data items are to double-click each item or to right-click each item and click **Insert**.

2. If you want to remove a data item from the report, select it, and in the report object toolbar, click the **More** icon  and then click the **Delete** option . To remove the data item from the report but keep it on the **Data Items** tab , click **Cut** instead.
3. For more information about a query item, right-click the item in the **Source** tab and click **Properties**. You can also obtain more information by clicking **Lineage**.

## Data organization

Available data is organized to match the functions available in iCON Manager Services. A user will only be able access data for which they have at least read permission to in Manager Services.



Tips:

Key employee data is stored in 2 main query subjects. Fields like the employee's name, organization, job title, birth date, etc. are stored in query subjects that match equivalent functions in Manager Services.

- Ad Hoc>Personal Information>Demographics
- Ad Hoc>Employment Info>Work Profile

Query Subjects with (Current), (Last), (Current Year), etc. appended to the name are pre-filtered versions of the query subjects designed to make it easier for you to find commonly needed information without having to apply your own filters. For example, "Ad Hoc>HR Actions>Employment Status (Current)" is pre-filtered to only the employee's current status where as "Ad Hoc>HR Actions>Employment Status" contains every status an employee has ever had.

There are 4 different folders for Payment History. These all include the same fields and come from the same source. Each one has a different set of required filters. Choose the one the best fits your needs, whether the report is based on Pay Ending Date or Check Date. For best performance use the query subjects that include a Legal Entity prompt.

Always start Payment History reports with fields from the Check History Master. These query subjects contain the unique "header" record for each check.

iCON stores accumulated payroll data. If you need payroll numbers across fixed calendar time frames like YTD or Quarter, this data can be retrieved from accumulator query subjects instead of Payment History. Accumulator query subjects store data by Legal Entity and Tax Year. The "Misc Payroll" query subjects are the header records for the accumulators. As a result, an example would be a filter applied for the Tax Year in Misc Payroll would also filter the tax year of any accumulator query subject included on the report. For earnings accumulators, use fields from the Pay Distribution folder and don't include the G/L Account field. The amounts per pay type will automatically be aggregated together for you.

## Data Security

Record-level security is based on the security method (Org Level Security, Reports To Security) configured in iCON. This prevents end-users from seeing employee data that they do not have permission to view, including compensation data.

Query subject availability follows Function Security in iCON Manager Services (function security controls what types of data an end-user can add, view, edit and delete for the employees they have access to in iCON). If a given iCON user doesn't have read access to a function in MS, they won't see that type of data in insertable objects for report authoring and won't be able to view that type of data in a report.

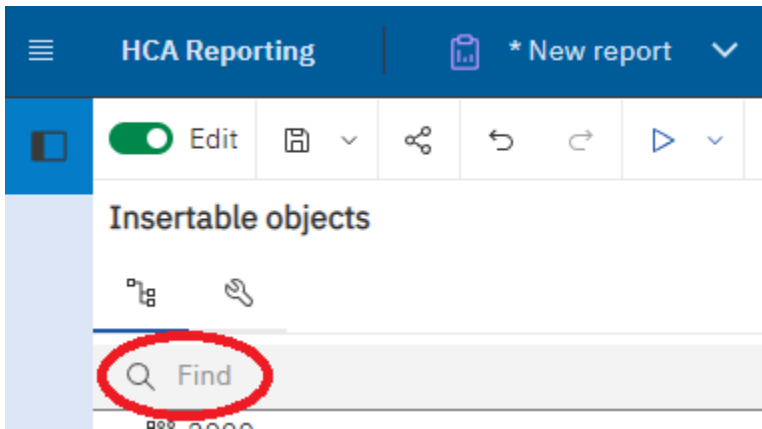
If an end-user has "No Salary" permission set in Organization Security they will not be able to see compensation related data. The Salary field in the following query subjects will be zero in this situation: Salary History, Salary Changes.

The Social Security Number field will be empty unless "Display Social Security Numbers in Manager Services" is selected in HR System defaults and the user has Function Security to the Demographics function OR "Display Social Security Numbers in Manager Services" is not selected but the user has Function Security Update permission to the Demographics or Misc Payroll functions.

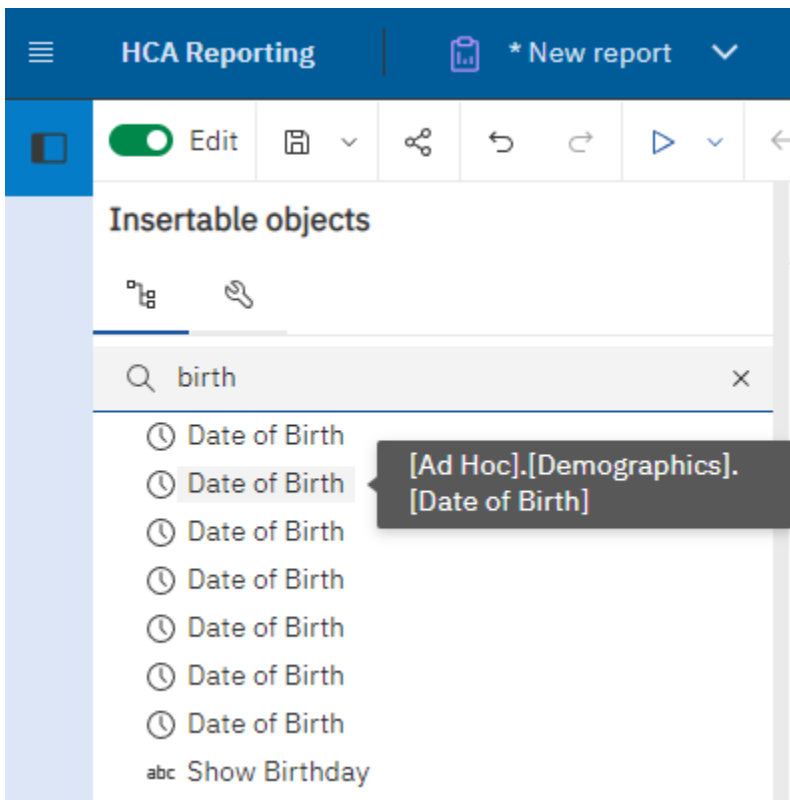
The "Report Security Update" function should be run after any organization security change in Manager Services. This will update the record level permissions used in Ad Hoc reporting. Otherwise, the changes will be applied to report security in a nightly process.

## Searching for fields

You can use the Find area above the package to find fields in the package.




Hover the cursor over the query items returned by the search to view which query subject the field belongs to. It is important to choose the item from the query subject most appropriate for the report.

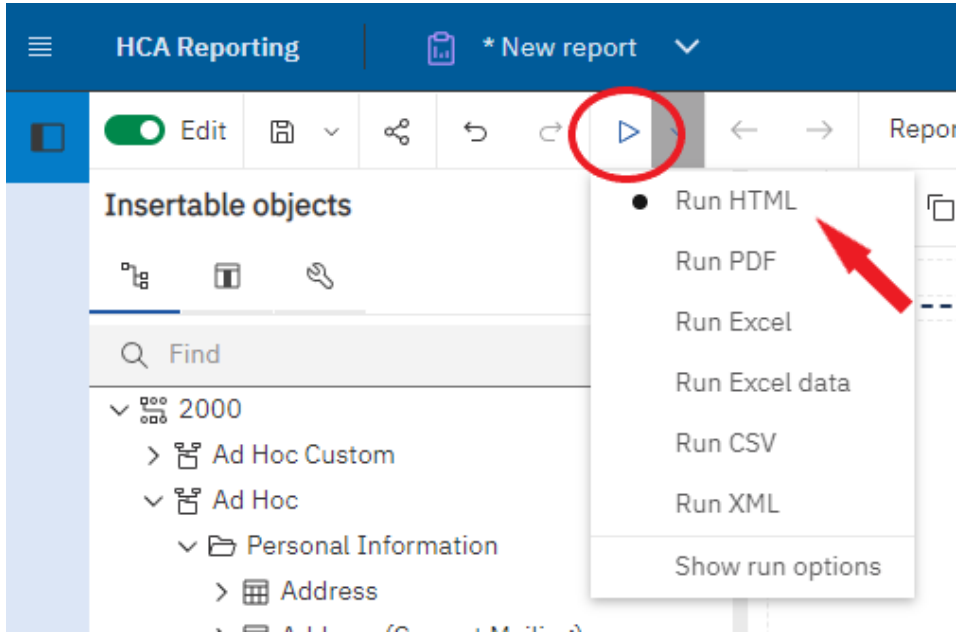


Tip: If you know where a field is displayed on a screen in Manager Services. Look for a folder in the reporting tool that has the same name as the function in Manager Services. This is where you should find the field in the reporting tool.

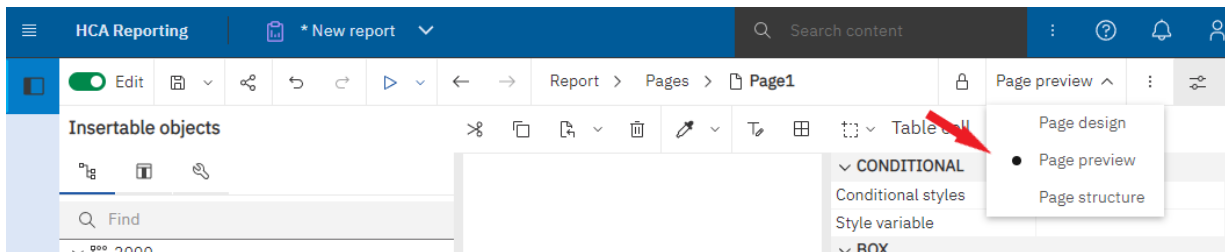
## Viewing results

After adding fields to the report, you can run the report or view a Preview of the results.

In the application bar, click Run options , chose the format to run the report in. The report viewer will run in a separate tab. If the report has prompts, you will be prompted for values.




To see a preview of the report results, change the view from **Page Design** to **Page Preview**.



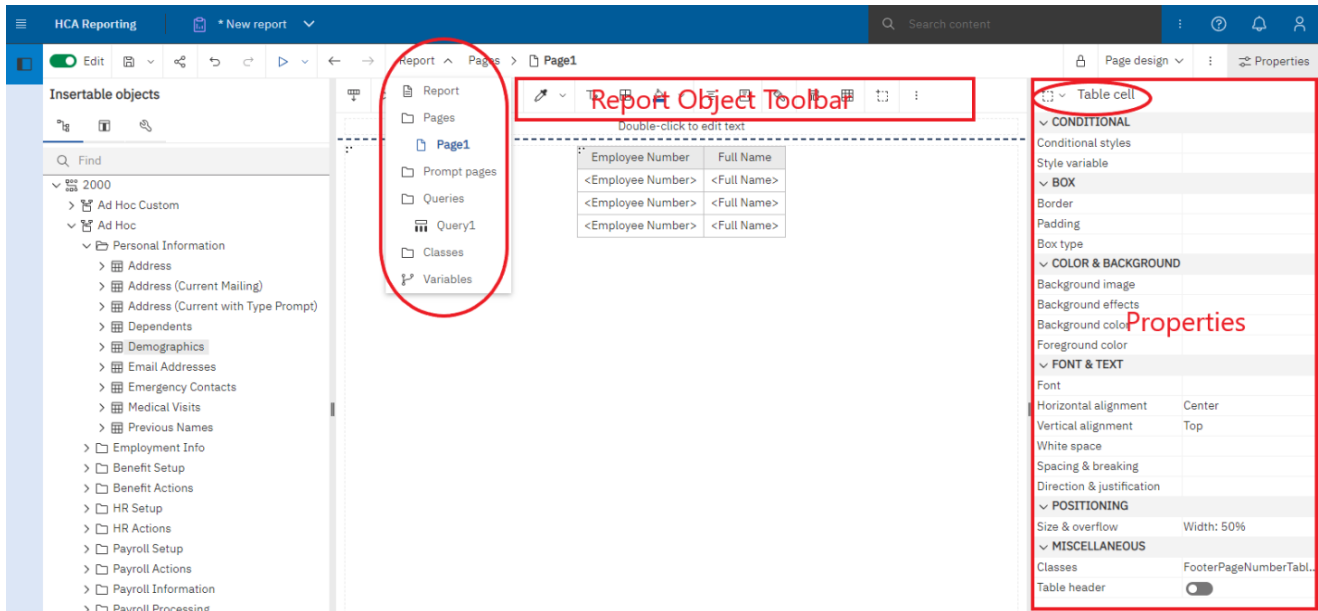
## Report authoring layout

The **Report Object Toolbar** gives access to features such as cut, paste, filtering, sorting, grouping and formatting.



**Properties** for the selected object are shown in the Properties pane. If properties are not visible click the show properties icon . You can also navigate to other object properties by using the object drop down list at the top of the Properties pane.

To navigate between report elements, pull down the **Report** drop down in the upper left. Under this drop down you can navigate to other elements, like the query or queries used in the report.





## Saving a report

In the application bar, when you view a report, tap either , or . The location of the save option depends on the type of report you view.

You also have the **Save as** option of saving the report version under a different name or in a different location.


Save Locations:

My Content – this folder is visible only to the user. Reports saved here will only be available to the current user.


Customer Shared Folder – this folder is visible to all user for the customer. Save a report here if you wish to share it with other users. This folder will be in this location: Team Content > iCON Content > Reports > Customer Folder > {customer number} > Shared.

Cognos Group folder – this folder is visible to only users defined in a Security Group. Save a report here if you only want a select set of users to access the report. Groups and memberships are defined in the HCA Security function. These folder locations will be: Team Content > iCON Content > Reports > Customer Folder > {customer number} > Groups > {group name}.

## Editing an existing report


Navigate to the report in the portal, from the entry context menu , click **Edit Report**.

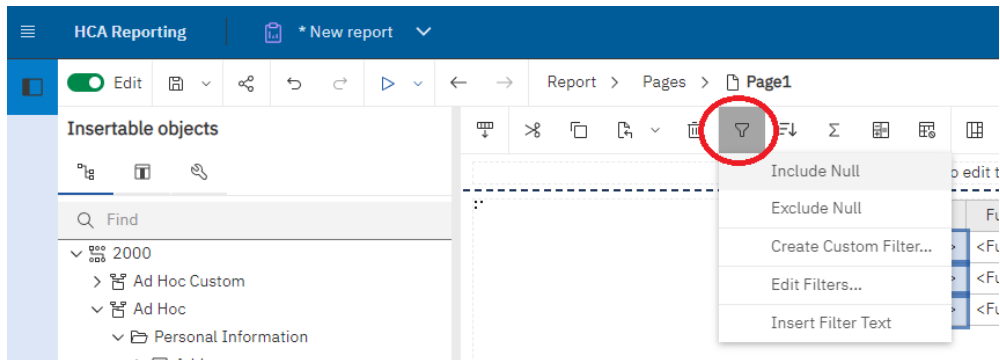
Alternatively, run the report by clicking the report name. Once the report is open choose **Edit**

 **Edit** in the application bar.

## Creating a filter

Use the **Create Custom Filter** option to create a simple filter based on one data item.

On the canvas, select the item in the report that you want to filter on, and in the on-demand toolbar, click the **Filters** icon , and then click **Create Custom Filter**.



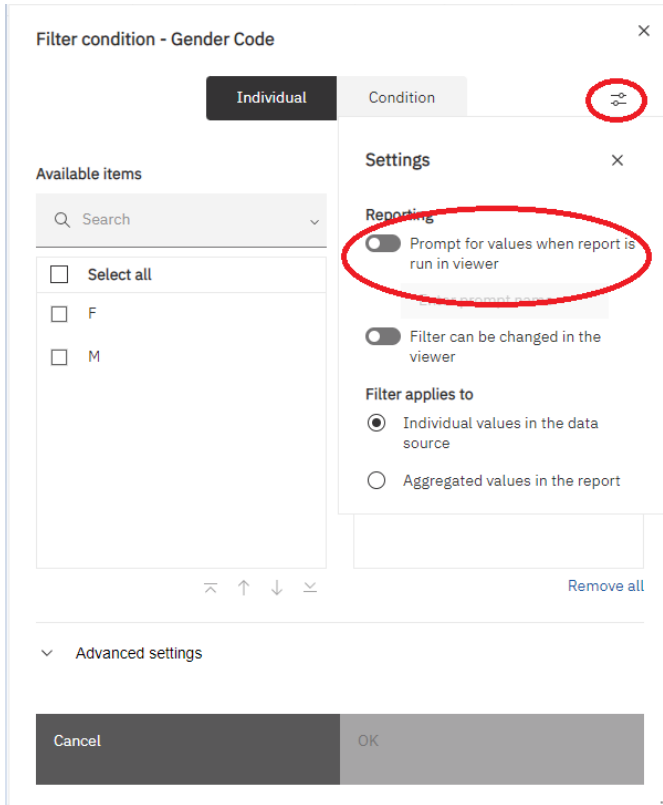
For all types of filters, there are some common settings you can define.

Click **Settings**  and then do the following steps:

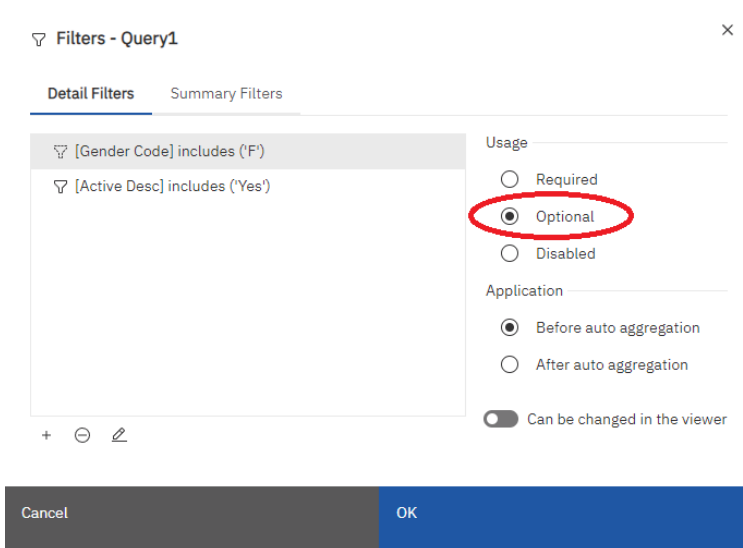
- To prompt for filter values when the report is run, select **Prompt for values when report is run in viewer**, and type a name for the prompt.
- To allow the filter criteria to be changed in the viewer, select **Filter can be changed in the viewer**.

Click **OK** when you're finished defining the filter conditions.

Create a filter with a prompt:





To make the use of a prompted filter optional, so that a value is not required to be selected for the report to run, set Usage to Optional on the Edit filters screen.

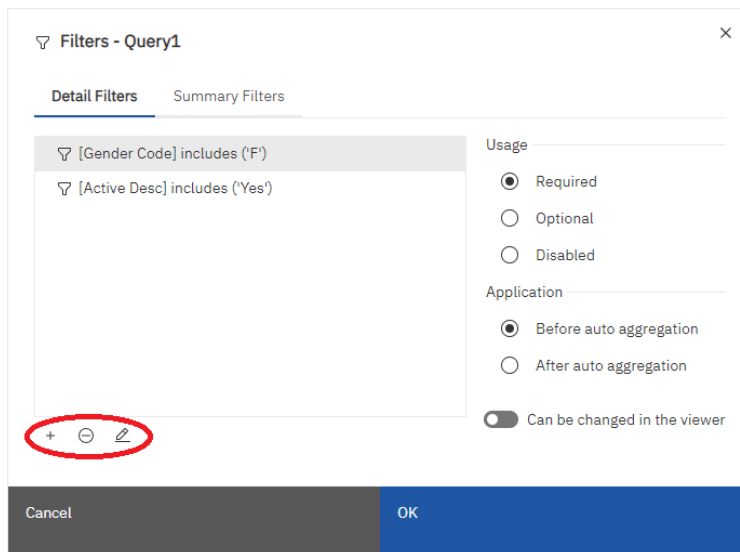


## Edit or remove a filter

After you created filters, you can edit or remove them.

1. Click a data container object that contains a filter.
2. To remove all filters from the object, in the report object toolbar, click the **Filters** icon  and click **Remove All Filters**.
3. To edit a filter or remove a single filter, in the report object toolbar, click the **Filters** icon  and click **Edit Filters**.

Edit Filters window:



 to add a new filter


 to remove the selected filter

 to edit the selected filter

Tip: Change Usage to Optional if a selection is not required for a prompted filter.

## Sorting relational data

You can sort items to view them in your preferred order. You can sort items in a list in ascending or descending order based on a value or a label, such as revenue or employee name. You can also perform advanced sorting to sort columns within groups or to sort a row or column using another data item.

1. Click the column or row on which to sort.
2. In the report object toolbar, click the **Sort** icon  and click **Ascending** or **Descending**.

An arrow appears beside the data item to indicate that a sort order was set.

When you specify a sort order for more than one column, the columns are sorted in the order in which they were inserted in the report. For example, you add columns A, B, and C to a report and specify a sort order for each. When you run the report, column A is sorted first, then column B, and then column C. You can change the order in which the columns are sorted in the **Edit Layout Sorting** options.

**Tip:** To remove a sort order, click **Don't Sort**.

## Group relational data

Group data items in a list report to remove duplicate values. For example, you have a report that shows all the products purchased and their product type. You group the Product type column so that each product type cell spans the products purchased cells.

After a column is grouped, you can move it elsewhere in the report.

1. Click the column(s) on which to group.

You can click either the column title or one of the column cells.


**Tip:** To perform multiple groupings at once, use Ctrl+click or Shift+click.


2. In the report object toolbar, click **Group/Ungroup** .

## Add a Simple Summary

You can add simple summaries to the groups in a report by using the summarize icon in the report object toolbar. This icon provides a subset of the summary functions available in IBM® Cognos® Analytics - Reporting. For list reports, a **Custom** option is also available so that you can add your own summary function in the expression of the data item.

In lists, the summary appears as a footer. If the column to which you added a summary is grouped, group and overall summaries appear. In crosstabs and charts, the summary appears as a node.

To change a summary, select it, click the **Show properties** icon , and in the **Properties** pane, under **Data Item**, click the **Summary** property and choose a different function.


1. Click the column to which to add a summary.
2. In the report object toolbar, click the **Summarize** icon  and click a summary type.
3. To change the summary label, do the following:
  - Click the label.
  - Click the **Show properties** icon, and In the **Properties** pane, under **Text Source**, set the **Source type** property to the source type to define the label.


- Set the property under **Source type** to specify the label. This property depends on the source type you chose. For example, if you chose **Data item value** as the source type, set the **Data item value** property to the data item to use to define the label.

## Format data

Format data in a report to improve readability. If you do not set **Data Format** properties here, data is formatted according to the properties set in the model.

Data formats are not applied in delimited text (CSV) and XML report outputs.

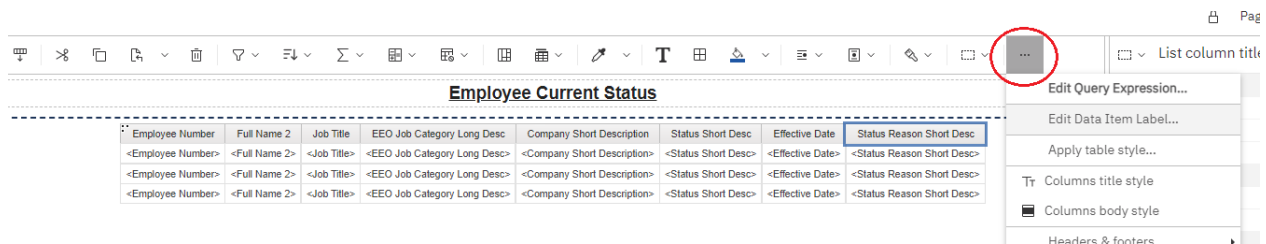
1. Click the object.
2. In the report object toolbar, click the **Data format** icon .
 

**Tip:** You can also click the **Show properties** icon , and then double-click the **Data format** property.
3. Under **Format type**, click the format type to apply to the object.
4. To override any of the properties of the format type that were defined for the current layout, in the **Properties** box, click the property and specify its value.

## Edit column header

Select the header to modify then in the report design tool bar, select More (...) then “Edit Data Item Label...”. Set the Data Item Label to the desired text.

Tip: The browser window may need to be maximized to see the More button.



The screenshot shows a report design tool interface. At the top is a toolbar with various icons. A red circle highlights the 'More' button (three dots) in the toolbar. Below the toolbar is a table titled 'Employee Current Status'. The table has the following columns: Employee Number, Full Name 2, Job Title, EEO Job Category Long Desc, Company Short Description, Status Short Desc, Effective Date, and Status Reason Short Desc. The 'Status Reason Short Desc' column is selected. A context menu is open over the 'More' button, showing options: Edit Query Expression..., Edit Data Item Label..., Apply table style..., Columns title style, Columns body style, and Headers & footers.

Employee Number	Full Name 2	Job Title	EEO Job Category Long Desc	Company Short Description	Status Short Desc	Effective Date	Status Reason Short Desc
<Employee Number>	<Full Name 2>	<Job Title>	<EEO Job Category Long Desc>	<Company Short Description>	<Status Short Desc>	<Effective Date>	<Status Reason Short Desc>
<Employee Number>	<Full Name 2>	<Job Title>	<EEO Job Category Long Desc>	<Company Short Description>	<Status Short Desc>	<Effective Date>	<Status Reason Short Desc>
<Employee Number>	<Full Name 2>	<Job Title>	<EEO Job Category Long Desc>	<Company Short Description>	<Status Short Desc>	<Effective Date>	<Status Reason Short Desc>