Exercise: Display Expenses by Project

A budget team wants to compare supply expenses across projects in their department.

The report builder chooses the KK_Detail star and the data elements below:

- Filters: Accounts (73%), Department (4011400), Fund (171), Fiscal Year (2014)
- Dimension Elements: Account and Description, Project ID & Short Title
- Fact Element: Total FY Expenses

Insert dimension elements and filters

1. From the Insert Data menu, expand AdHoc View > Ledger KK Detail.
2. Expand the Account dimension.
   a. Double-click Account and Description. (Note: this element does not sort automatically.)
   b. On the canvas, right-click the column heading.
   c. Click Filter.
   d. In the Keyword field, type 73% > Search.
   e. Select all results > Insert > OK.
   f. Close the dimension.
3. Expand the Department dimension.
   a. Right-click Department ID > Filter for Report.
   b. In the Keyword field, type 4011400 > Search.
   c. Select the result > Insert > OK > Apply > OK.
   d. Close the dimension.
4. Expand the Fund dimension.
   a. Right-click Fund > Filter for Report.
   b. In the Keyword field, type 171 > Search.
   c. Select the result > Insert > OK > Apply > OK.
   d. Close the dimension.
5. Expand the Project dimension.
   a. Double-click Project ID & Project Short Title. (Note: this element does not sort automatically.)
   b. Close the dimension.

Insert the fact element

6. Expand the KK Detail Fact table.
   a. Click and drag Total FY Expense onto the canvas to the right of the other two columns.
   b. Close the fact table.
7. Save the report to My Folder and name it “SupplyExpensesbyProject.”

Apply finishing touches

8. Create the crosstab layout.
   a. Click the Account and Description column heading.
   b. Click the Pivot icon.

9. Sort the columns and rows.
   a. On the canvas, click the column heading.

b. On the toolbar, click the Sort icon.
c. On the canvas, click the row heading.
d. On the toolbar, click the Sort icon.

10. Give the report a title and subtitle.
    a. Double-click Title.
    b. Type the title “Supply Expenses by Designated Project.”
    c. Type the subtitle “Supply Accounts in Chemistry (4011400)” > OK.
11. Apply a template.
    a. In the Menu, click Change Layout > Apply Template…
    b. Click Apply a template > Select a template…
    c. Navigate to Cognos > Public folders > PS_EPM_ADHOC.
    d. Click PeopleSoft_Template_Final > OK > OK.

Run the report

12. Save and run the report. Result: Fiscal Year and Budget Year prompts appear.
13. Enter 2014 in each prompt > Insert > OK. Result: The report appears sorted ascending by Project ID and Account number.

Switch the position of rows and columns

14. Click the Swap Rows & Columns icon. Result: The report previews again with no data.
15. Click the Run icon.
16. Click OK to confirm 2014 in the prompts. Result: The report reappears. Projects appear horizontally across the top. Accounts appear vertically on the left.

Hide filters and sorts, then view the report in PDF format

17. From the Menu, click Change Layout.
18. Click Edit Title Area…
19. Deselect the Show filters checkbox > OK.
20. From the Menu, click Run Report.
21. Click View in PDF Format. Result: The report appears in a new window. You can save the PDF file to your local or network drive. After opening the file, you can save the report as an Excel worksheet.