
Mississippi Management and Reporting System

Department of Finance and Administration

MMRS MASH/Training Materials		
4104	MERLIN Creating Prompts	Revision Date: 04/20/2007
		Version: 2

Table of Contents

Creating Filtering Prompts	3
Adding Variables to a Title	3
Exercise 1	4
Challenge 1 - Prompts	8

Creating Filtering Prompts

Prompts can be created to allow users to easily apply filters to reports. A Type In prompt requires the user to type a value exactly as it appears in the data warehouse. Type In prompts are useful when the filter value changes frequently and is not a predefined value. A Catalog Picklist prompt makes filtering data easier, quicker, and more accurate since a scrollable list of values is available from which to choose. Use the Catalog Picklist option when you require access to every value within a catalog. To create a prompt:

- Choose *Query* from the *Report* menu, and then select the *Filter* tab
- Double-click *Prompt* from the *Options* box
- Type a name for the prompt in the *Name* box
- Select the type of prompt from the *Type* box
- Type a message in the *Message* box
- Choose OK
- Choose OK

If a defined prompt expression isn't valid, the message in the Tips box will indicate that there is an error in your prompt expression and the location of the error is highlighted.

Adding Variables to a Title

When prompts have been created for a report, it is easy to include them in the title so that the title will always reflect the variables chosen. This also allows the deletion of repetitive columns in the report. To add variables to the title:

- Select *More Objects...* from the *Insert* menu
- Highlight *Prompt variables* in the *Available Objects* list
- Click *Insert*
- Select the appropriate column from the *Choose Report Prompt* window
- Click *OK*
- Place the cursor in the title where the prompt should be inserted
- Click and format appropriately

Exercise 1

Create an expenditures report for one agency (AGRICULTURE) which includes a column showing a projected increase. Create *Type In* prompts for the Budget Year and the Projected Increase filters and a *Picklist* prompt for the Accounting Month. Your prompt and report should appear as shown below. (Note: the actual report data may not be identical)

Prompts

Please type the budget year

Select the accounting month from the list

Type the projected increase [Example: 10% as .10]

Major Obj Code	Minor Obj Code	Vendor Nbr	Vendor Name	Bud Exp	Projection
A1	60010	V0000285630	AFLAC	\$3.88	\$4.66
		V0000731300	AMERICAN GENERAL LIFE INS CO	\$103.43	\$124.12
		V0000731300	AMERICAN GENERAL LIFE INS CO	\$76.00	\$91.20
		V0000731300	AMERICAN GENERAL LIFE INS CO	\$16.12	\$19.34
		V0000412610	AMERICAN NATIONAL INSURANCE	\$20.54	\$24.65
		V0000412610	AMERICAN NATIONAL INSURANCE	\$20.35	\$24.42
		V0000313240	COLONIAL LIFE & ACCIDENT INS	\$15.00	\$18.00
		V0000178910	COMMERCIAL LIFE INSURANCE CO	\$6.63	\$7.96
		V0000178910	COMMERCIAL LIFE INSURANCE CO	\$9.75	\$11.70
		V0000575170	GEORGE CTY DEPT HUMAN SERVICES	\$181.66	\$217.99
		V0000078090	JIM BUCK ROSS AG & FORESTRY	\$31.50	\$37.80
		V0000078090	JIM BUCK ROSS AG & FORESTRY	\$5.00	\$6.00
		V0000468520	LIFE OF ALABAMA INSURANCE	\$349.68	\$419.62
		V0000468520	LIFE OF ALABAMA INSURANCE	\$115.79	\$138.95
		V0000468520	LIFE OF ALABAMA INSURANCE	\$171.58	\$205.90
		V0000919690	MASE	\$20.00	\$24.00
		V0000321490	MEDICAL PLANS INC	\$6.99	\$8.39
		V0000321490	MEDICAL PLANS INC	\$82.99	\$99.59
		V0000321490	MEDICAL PLANS INC	\$52.50	\$63.00
		V0000321490	MEDICAL PLANS INC	\$328.07	\$393.68
		V0000321490	MEDICAL PLANS INC	\$17.00	\$20.40
		V0000296340	MS GOV EMP DEFERRED COMP PLAN	\$1,733.72	\$2,080.46
		V0000296340	MS GOV EMP DEFERRED COMP PLAN	\$625.00	\$750.00
		V0000296340	MS GOV EMP DEFERRED COMP PLAN	\$740.00	\$888.00

1. Click the New button on the PowerBar**2. Add columns to your report**

Agency Nm (SAAS)

Agency Nbr (SAAS)

Budget Year

Accounting Year

Accounting Month

Major Obj Code

Minor Obj Code

Vendor Name

Vendor Nbr

Bud Exp

3. Filter the report

Agency Nbr (SAAS) = **401**

Budget Year = **1997**

Accounting Month = **08**

4. Group the report by Major Object Code and Minor Object Code**5. Click OK****6. Add a title for the agency and delete the columns agency name and agency number**

- Type AGRICULTURE in the Title header
- Click any item under the Agency name column
- Ctrl Click any item under the Agency number column
- Touch the delete key

7. Modify the filter by creating a prompt for budget year

- Open the *Filter* tab in the *Query* dialog box
- Click to the left of 1997 in the Budget Year filter
- Double click *Prompt Manager*
- Type **Budget Year** in the *Name* field
- (Note the *Type* field defaults to *Type In*)
- Type **Please type the budget year** in the *Message* field
- Click *OK*
- Click *OK*
- Delete '1997' from the filter

- Click *OK*
 - Cancel the new prompt
- 8. Modify title to include the Budget Year prompt**
- Select *More Objects...* from the *Insert* menu
 - Highlight *Prompt variables* in the *Available Objects* list
 - Click *Insert*
 - Select *budget year* from the *Available Prompt* window
 - Click *OK*
 - Put tip of arrow at end of **AGRICULTURE** and click
 - Modify the title that is inserted
- 9. Test the new prompt title**
- Click the prompt power button
 - Type **1996** in the budget year prompt and click *OK*
 - (Note the title)
 - Rerun the report with 1997 data
- 10. Add a prompt for accounting month**
- Open the *Query* from the *Report* menu and select the *Filter* tab
 - Click to the left of *08* in the Accounting Month filter
 - Double click *Prompt Manager*
 - Click *New...* in the *Choose Report Prompt* window
 - Type **Accounting month** in the *Name* field
 - Choose *File Picklist* from the *Type* dropdown menu
 - Click *Browse*, browse the directory **c:\program files\cognos\cer5\merlin**
 - Select the file *Pickmos.txt*
 - Click *Open*
 - Type **Select the Accounting month from the list** in the *Message* field
 - Click *OK*
 - Click *OK*
 - Delete '08' from the filter
 - Click *OK* and note the dropdown menu in the Accounting Month prompt
 - Retrieve the data for **07**
- 11. Add the Accounting Month prompt variable to the title (see step 8)**
- 12. Delete the columns not shown on the completed report**
- 13. Create the calculated Projection column**
- Select *Calculation...* from the *Insert* menu
 - Place the pointer to the right of the *Bud Exp* column and click
 - Type **Projection** in the *Name* field of the *Calculation Definition* window
 - Complete the Expression as follows:
 - **Bud Exp * 1.10**
 - Click *OK*

14. Format the *Bud Exp* and *Projection* columns with no decimals

- Highlight a value in *Bud Exp*
- Ctrl>Click on a value in the *Projection* column
- Select *Data...* from the *Format* menu
- Select **#,##0** from the *Positive* menu
- Click *OK*

15. Adding a prompt for a calculated column

- Open the *Query* window from the *Report* menu and select the *Data* tab
- Select *Projection* from *Query Data*
- Click *Edit Definition...*
- Click to the left of 1.10
- Double click *Prompt Manager*
- Type **Projected Increase** in the *Name* field
- Ensure *Type In* is highlighted as the *Type*
- Type **Type the projected increase (Example: 10% as .10)** in the *Message* field
- Click *OK*
- Click *OK*
- Delete 1.10
- Complete the formula by adding **+ Bud Exp**
- Click *OK*
- Click *OK*

16. Use the new Prompt to create a report for January, 1997 with a 20 percent projection**17. Add a prompt in the title for Projected Increase rate****18. Save as adhocex5 for use in the next chapter**

Challenge 1 - Prompts

Customize the standard *Expenditures by \$* report so that a SAAS agency (MENTAL HEALTH) is hard-coded in the filter and you are no longer prompted to enter the agency group name. Modify the title so the agency name appears in the title as well as the accounting month and budget fiscal year. Your report should appear as shown below. (Several columns have been eliminated from the standard report. It is grouped by Major Obj Code and sorted by Bud Exp Amt.)

Save the report as *chall_5* so you can use it as a basis for the challenge at the end of the next chapter.

The screenshot shows a software window titled "Impromptu - [chall5]" with a menu bar (File, Edit, View, Insert, Format, Report, Catalog, Tools, Window, Help) and a toolbar. The main area displays a report for "MENTAL HEALTH" with the following filters: "Amount >= 3000", "Budget Year: 1997", and "Accounting Month: 07". The report is grouped by Major Obj Code and sorted by Bud Exp Amt. The data is presented in a table with the following columns: Major Obj Code, Minor Obj Code, Allotment Period, Fund Number, and Bud Exp.

Major Obj Code	Minor Obj Code	Allotment Period	Fund Number	Bud Exp
A1	60010	2	2371	102194.70
	60090	2	2371	3582.59
	60110	2	2371	11033.63
	60120	2	2371	8156.23
	60140	2	2371	4734.60
	60010	2	3371	78907.17
	60110	2	3371	7515.20
	60120	2	3371	6041.86
	60140	2	3371	4134.85
A2	60010	2	3379	14630.17
	60320	2	2371	4947.60
B	61640	2	2370	47745.85
	61122	2	2371	4475.00
	61470	2	2371	43378.50
	61700	2	2371	3288.40
	61653	2	3371	6224.25
	61470	2	3379	4034.00
E	64790	2	2370	453012.25
	64790	2	2370	78867.79
	66050	2	2370	543121.47
	89150	2	2370	111118.99
	89150	2	2370	20183.38
	64790	2	3370	776535.83
	64790	2	3370	283479.97
	64790	2	3370	606647.44
	89100	2	3370	23877.96

The window also shows a logo for the "WEST VIRGINIA STATE DEPARTMENT OF HEALTH SERVICES" and the text "MERLIN DSS". The status bar at the bottom indicates "Data Warehouse Catalog" and the page number "34".