

PRINCETON UNIVERSITY

# Information Warehouse - Report Studio

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Mail Merge Reports

**Elisabetta Zodeiko**

**1/17/2014**

## Creating a Mail merge/Letter-type Report Using a Blank Report

Using Report Studio, a report can be formatted to appear as a letter. The report can then generate one letter for one or many people.

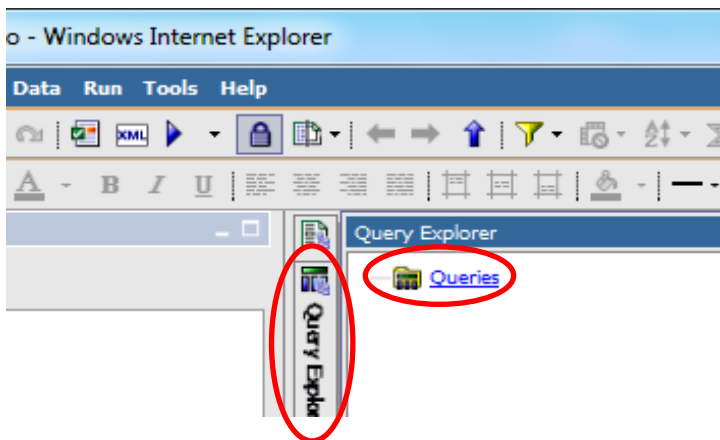
**GOAL:** To write a report in a letter-type format using a Blank report template.

**NB:** The instructions below use the “Cognos 8 Training” Blue Package, in the Information Warehouse QA instance, found through the “Testing & Training” link on the Information Warehouse Site:

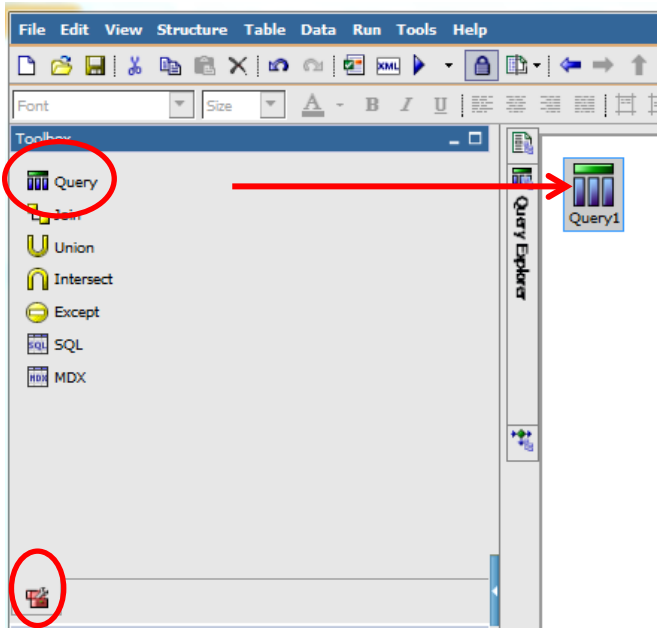
[www.princeton.edu/iw](http://www.princeton.edu/iw)

### STEPS:

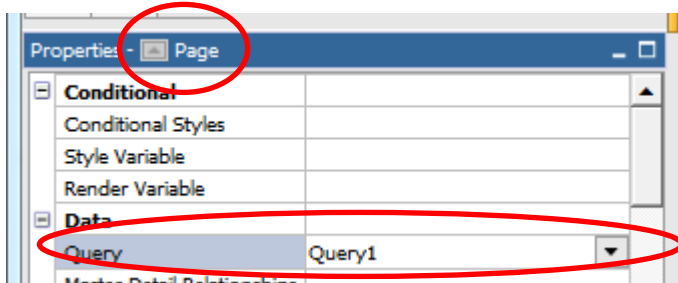
1. From within Report Studio, click on **File > New Report**.
2. Choose a **Blank** report format.
3. Mouse over the **Query Explorer**. Click on the **Queries** link.



- In the new window, from the **Toolbox** tab, drag over a **Query** item and place it into the canvas.

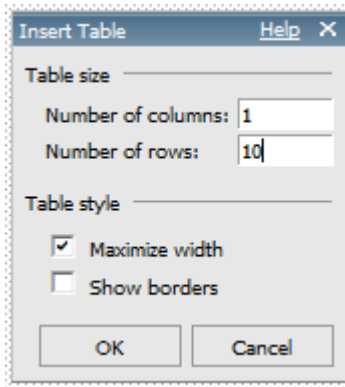


- Mouse over the **Page Explorer** and click on the **Page 1** under **Report Pages**.
- Click anywhere on the canvas.
- Select the **Ancestor** button.
- Select **Page**.
- In the **Query** Property, select **Query 1**. (Query 1 is the Query created in the Step 4 above.)

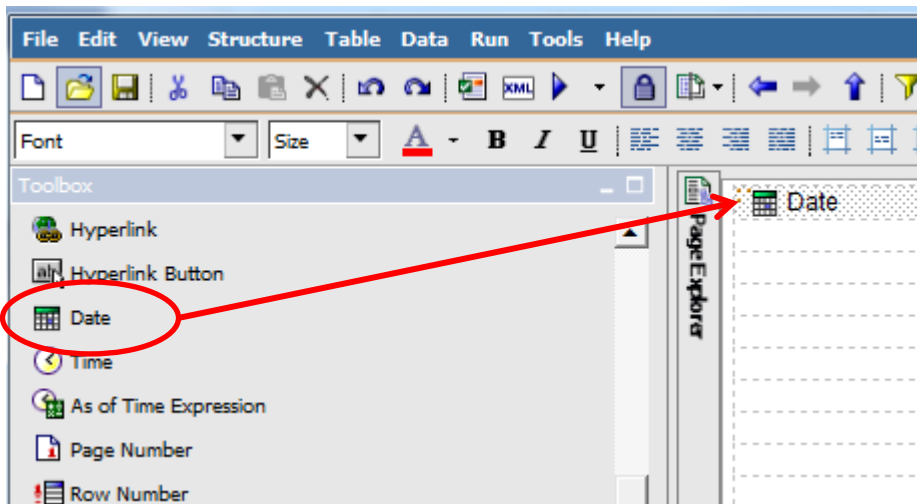


- The formatting on the canvas can now begin, following the exact type of letter being created. From the **Toolbox** tab, drag over a **Table** and place it into the canvas.
- Give the **Table**: 1 column, 10 rows.

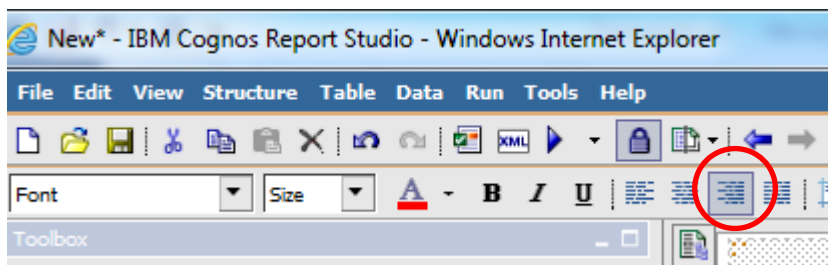
- Click **OK**.



- From the **Toolbox** tab, drag over a **Date** item and place it into the first row of the **Table**.



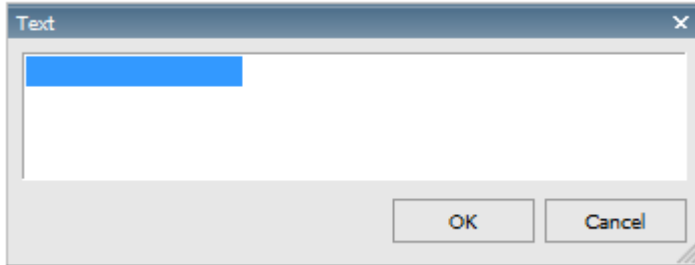
- Click on the **Table Row**. From the upper-level toolbar, click on the **Right-align** button to align the **Date** object to the right side of the table row.



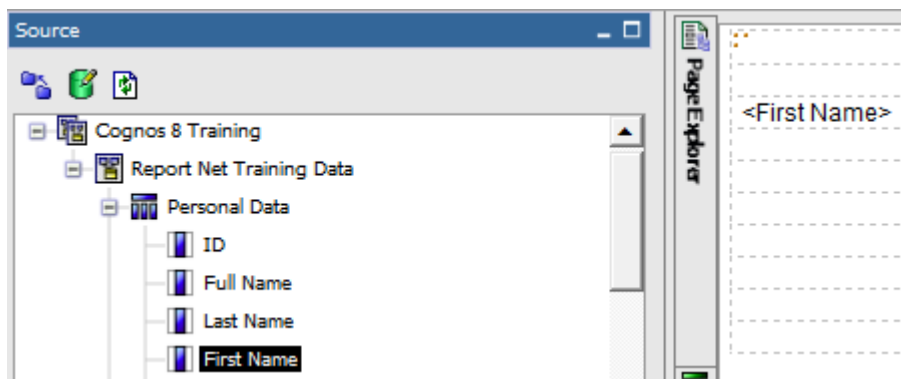
- From the **Toolbox** tab, drag over a **Text** Item and place it into the second table row.

16. Insert twenty or more spaces into the **Text** Item. Click **OK**.

**NB:** Inserting a Text item with blank spaces inserts a blank row into the report, so when printed, the report shows a space between lines in the 'letter'.



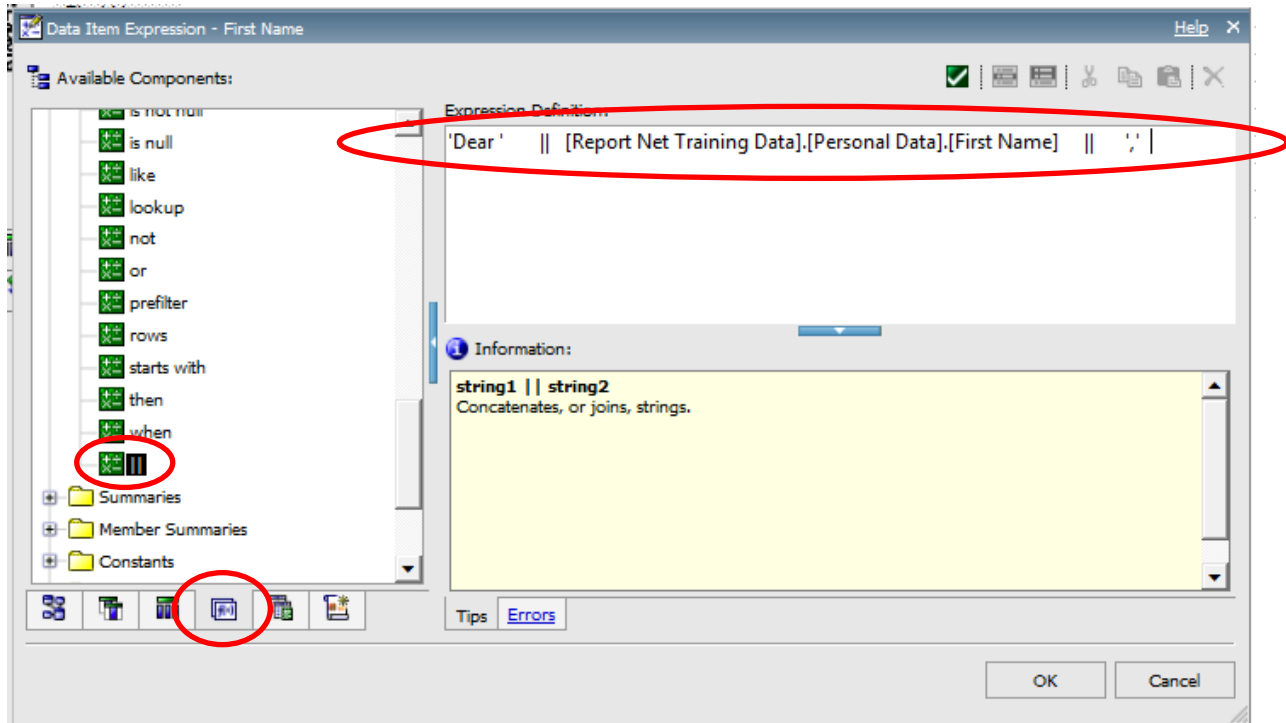
17. From the **Source Tab**, from the **Personal Data** Query Subject, drag in the **First Name** field and place it into the third row of the table.



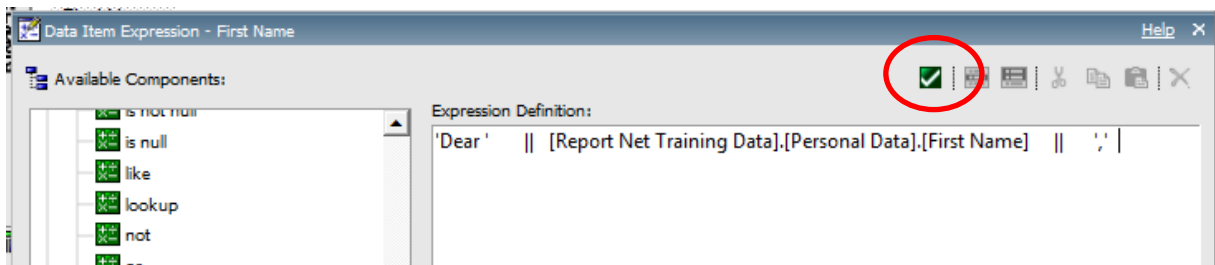
18. Double-click on the **First Name** field in the Table.

19. In the new window, concatenate the text “Dear “ before the First Name field and the text “,” after the **First Name** field, using the **double-pipe** symbols, found on the **Functions** tab, under the **Operators** folder.

'Dear ' || [Report Net Training Data].[Personal Data].[First Name] || ','

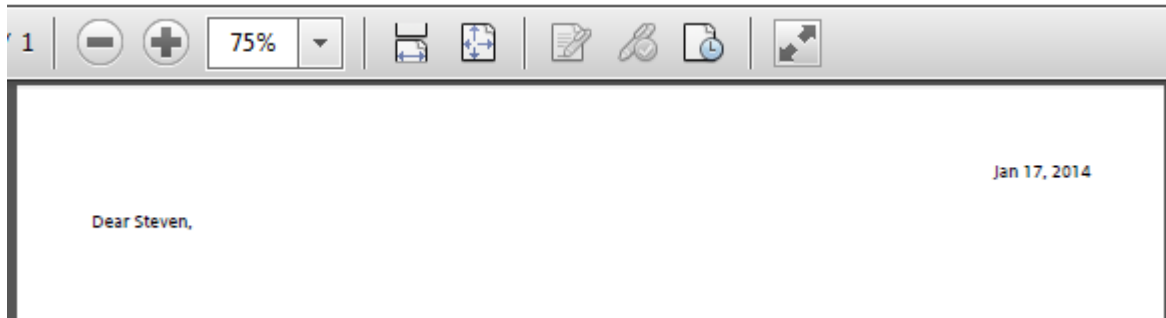


20. **Validate** the Expression by clicking the **Validate** button to ensure there are no errors in the Expression.

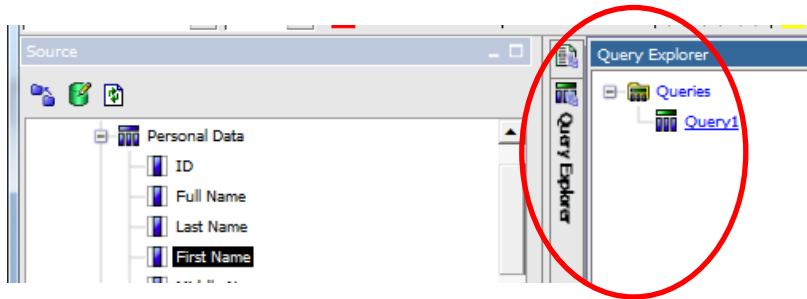


21. When **No errors** are received, click **OK**.

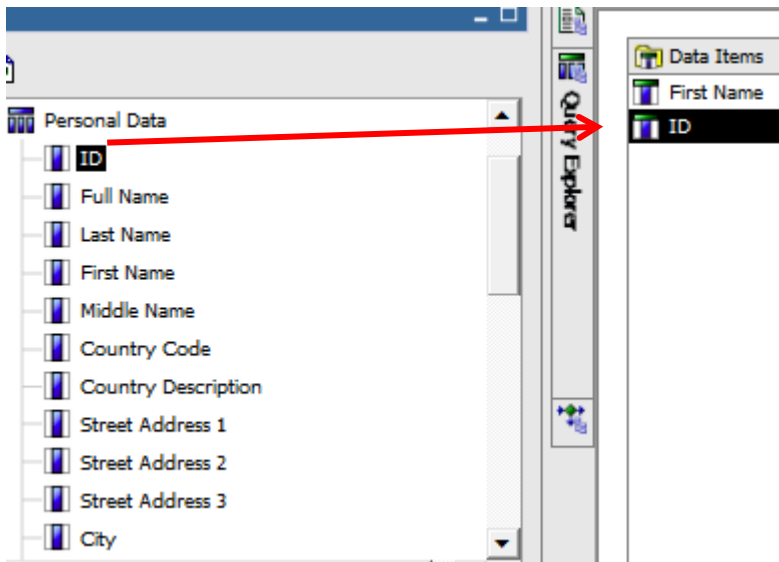
22. **Run** the report to **PDF**. One page will appear with the current date displayed and a salutation.



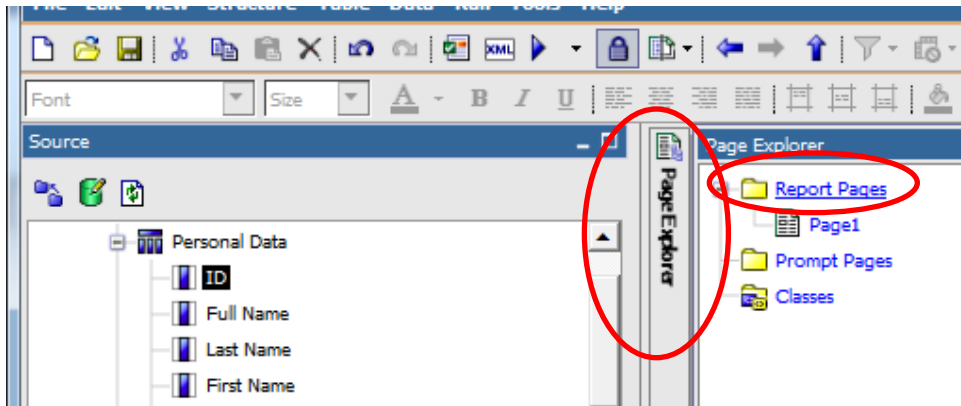
23. Close the PDF preview window to return to Report Studio.
24. To have a page, or letter, for each unique person, a unique identifier must be placed into Query 1. Usually this unique identifier is an Employee ID or Student ID, or some other unique identifier. Mouse-over the **Query Explorer** and click on **Query 1**.




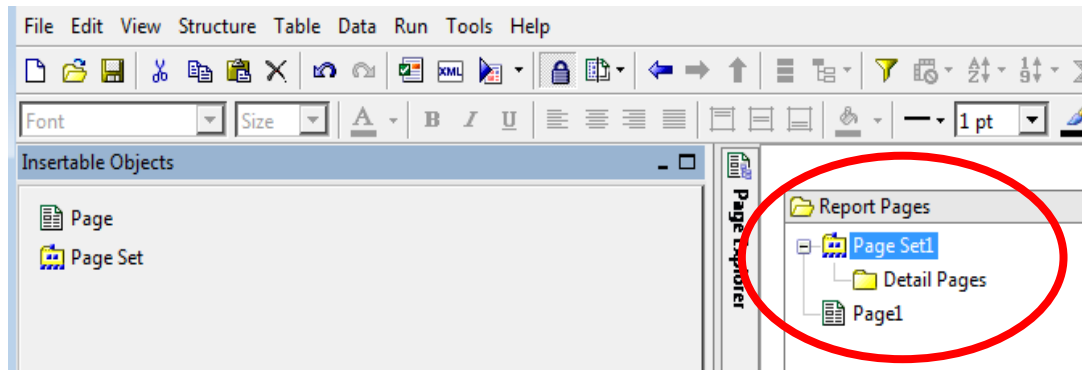
25. From the **Personal Data** Query Subject, drag over the **ID** field and place it in the **Data Items** section.



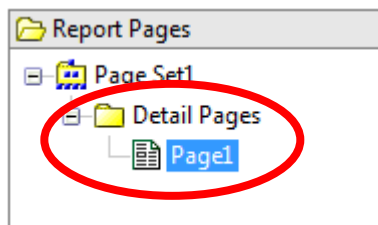
26. Mouse over the **Page Explorer** and click on the yellow **Report Pages** text, next to the yellow envelop.



27. From the **Toolbox** tab , drag over a **Page Set**  and place it *above* **Page1** in the Page Explorer.



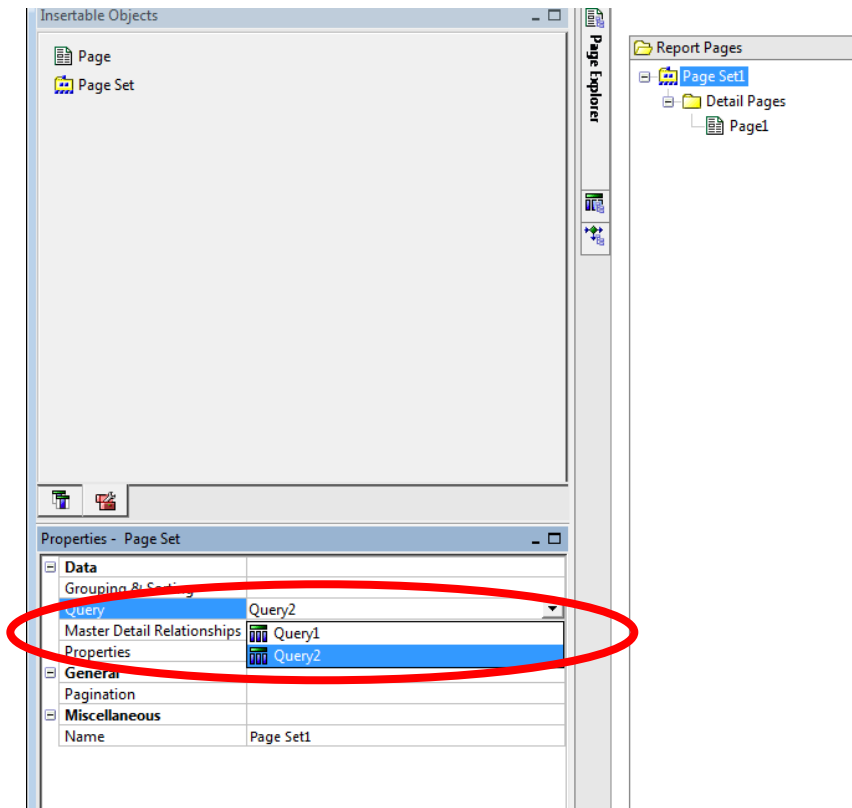
28. Drag **Page1** into the **Detail Pages** folder, so that **Page1** appears below the **Detail Pages** folder.



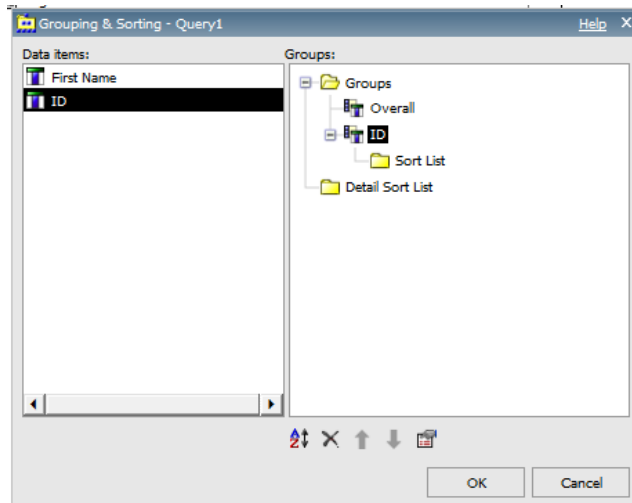
29. Click *once* on **Page Set1**.
30. In the **Properties** section, click on the **Query** property.



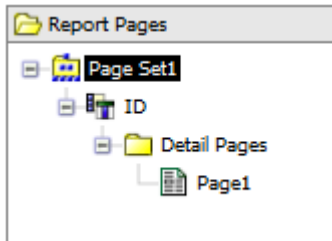
31. Click the drop-down arrow which appears next to **Query 2**. Select **Query 1**.



32. Also in the **Properties** section, click on the **Grouping and Sorting** property.
33. Click the **ellipses** button.
34. In the new window, drag **ID** under the **Overall** section.

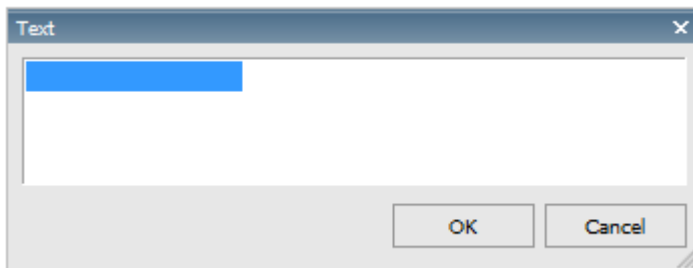


35. Click **OK**. The **Report Pages** area should now look as below:



36. Mouse over the **Page Explorer** and click on **Page 1**.

37. From the **Toolbox** tab, drag over a **Text box** item and insert it into the fourth row of the table, to place a space between the Letter's salutation and the first line of text. In the **Text** Item, type twenty or more spaces. Click **OK**



38. From the **Toolbox** tab, drag over a **Text box** item and insert it into the fifth row of the table. In the Textbox, type the following text, being sure to place one space after the word "the":

**Congratulations on your new position within the**

39. Click **OK**.

40. From the **Source** tab, drag over the **Dept Name** field from the **Job Data** Query Subject and place it *next to* the Text box.

41. From the **Toolbox** tab, drag over a **Text box** item and place it into the fifth row, after the **Dept Name** field. Into the **Textbox**, type the following text, being sure to place one space before the word "department".

**department.**

42. From the **Toolbox** tab, drag over a **Text box** item and insert it into the sixth row of the table, and type twenty or more spaces.

43. Click **OK**

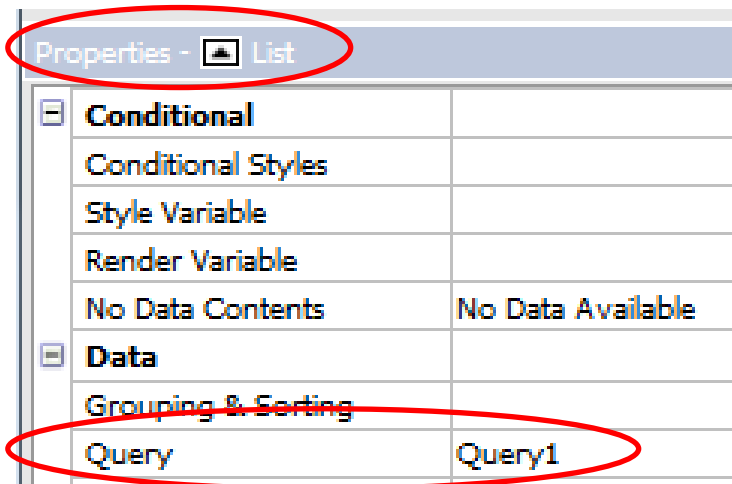
43. From the **Toolbox** tab, drag over a **Text box** item and insert it into the seventh row of the table, and type the following text:

**This is the Citizenship information you provided upon your acceptance of your position. If this information is not correct, please contact the Human Resources Department.**

44. From the **Toolbox** tab, drag over a **List** object and place it into the eighth row of the table.

45. Click anywhere in the List object. From the **Properties** menu, click the Ancestor button and select **List**.

46. In the **Query** Property, click on the drop-down arrow and select **Query 1**.



47. From the Source tab, drag over the **Citizenship Status Description** and **Country of Citizenship Description** fields from the **Citizenship Data** Query Subject and place them into the **List**.

48. Run the report. There should be twenty pages returned, with each person having a department displayed in the first line of the Letter, and their Citizenship information in the List below.

Jan 31, 2014

Dear Robin,

Congratulations on your new position within the OIT department.

This is the Citizenship information you provided upon your acceptance of your position. If this information is not correct, please contact the Human Resources Department.

Citizenship Status Description	Country of Citizenship Description
Citizen	

49. From the **Toolbox** tab, drag over a Text box and insert it into the ninth row of the table, and type twenty or more spaces. Click **OK**

50. From the **Toolbox** tab, drag over a Text box and insert it into the tenth row of the table, and type the following text:

**Thank you.**

51. Run the report. The letters are finished.

Notes: There is no spell-check feature in Report Studio.