Information Warehouse - Report Studio

Mail Merge Reports

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

5. Mouse over the Page Explorer and click on the Page 1 under Report Pages.

6. Click anywhere on the canvas.

7. Select the Ancestor button.

8. Select Page.

9. In the Query Property, select Query 1. (Query 1 is the Query created in the Step 4 above.)

10. 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.

11. Give the Table: 1 column, 10 rows.
12. Click OK.

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

14. 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.

15. 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.

![PDF preview](image)

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**.

![Query Explorer](image)

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

![Personal Data](image)
26. Mouse over the Page Explorer and click on the yellow Report Pages text, next to the yellow envelop.

![Page Explorer screenshot](image1)

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

![Toolbox screenshot](image2)

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

![Folder structure screenshot](image3)

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**.

![Diagram showing the drop-down arrow and selecting Query 1](image1)

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.

![Diagram showing the Grouping & Sorting window with ID under Overall](image2)
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.

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**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.**

<table>
<thead>
<tr>
<th>Citizenship Status Description</th>
<th>Country of Citizenship Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citizen</td>
<td></td>
</tr>
</tbody>
</table>
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.