COGNOS(R) Business Intelligence Series 7

Cognos Impromptu (R)

IMPROMPTU USER REFERENCE

THE NEXT LEVEL OF PERFORMANCE™

Product Information

This document applies to Cognos Impromptu (R) Version 7.4 and may also apply to subsequent releases. To check for newer versions of this document, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

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PART 1: Impromptu User

Chapter 1: View a Report

Description

You may have created your own Impromptu reports, or someone else in your organization may have created a number of reports for you. When you view or open a report, Impromptu retrieves the data from the database.

What You Can Do

You can

- view an existing Impromptu report.
- view the report in either page or screen layout view.
- drill through to information behind a value in your report using a drill-through report created by you or your administrator.

  For example, you can view the detailed sales transactions that account for the total sales for a particular customer.

Related Topics

- "Change the Page Layout View of a Report" (p. 11)
- "View an Existing Report" (p. 9)
- "View the Details of a Value in a Report" (p. 10)

View an Existing Report

Steps

1. If you are just starting Impromptu, click Open an Existing Report in the Welcome dialog box. Otherwise, from the File menu click Open.
2. Locate and select the report you want to open, and click Open.

   If the Cognos Common Logon dialog appears, type your User ID and click Log On if you are using Access Manager for security. Otherwise, click Cancel.

   If you do not have a catalog open, the Catalog Logon dialog box appears where you can select a catalog, enter your user class and click OK.
3. Click OK.

   If the catalog or report was created with a previous version of Impromptu, see "Upgrade a Catalog or Report" (p. 31).

More Info

Note

- The Welcome dialog box is not available when the Show the Welcome to Impromptu dialog check box is cleared in the Start-up tab (Options dialog box, Tools menu).

Tips

- To quickly locate reports in the User Workspace folder, click the FastFind button (Open dialog box). To add a shortcut to one of your folders or reports in the User Workspace, click Add to FastFind (Open dialog box).
- You can load the same catalog automatically every time you run Impromptu. From the Tools menu, click Options, and click the Startup tab.

Related Topics

- "View a Report" (p. 9)
- "View the Details of a Value in a Report" (p. 10)

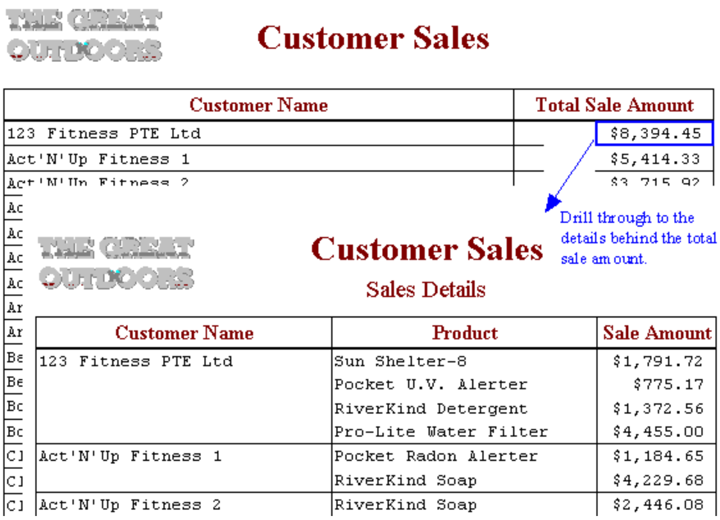
View the Details of a Value in a Report

Description

You or your administrator may have created one or more drill through reports that you can open from your current report. A drill-through report shows information behind a value you select in the current report.

The Drill Through command is available for list reports, crosstab reports, sub-reports, charts, and reports using HotFiles or snapshots.

Example



Steps to View the Details Using the Report Menu

1. Select a value associated with a drill-through report.

   Note: Do not select multiple rows and columns. Drill-through reports are available only when you select a single value.

   You may want to add custom formatting, such as highlighting or underlined text, to indicate which values are associated with a drill-through report.
2. From the Report menu, click Drill Through.
3. Select the report you want to view from the list, and click OK.

Step to Quickly View the Details of a Value in a Report

- To open the default drill-through report, do one of the following:
  - Select a value associated with a drill-through report and click the Drill Through toolbar button.

    
    Drill Through button
  - Double-click a value associated with a drill-through report.

  Impromptu opens the default drill-through report if an association exists. If no drill-through association exists, the I beam cursor appears indicating that you can edit the text.

More Info

Notes

- Only one copy of a drill-through report associated with a value can be open at a time.

- Impromptu includes a sample drill-through report, Product Orders Drill-Through.imr

Tips

- To return to the main report from a drill-through report, use the Window menu.
- To view all the data in a drill-through report, click the Undo button on the toolbar.

  Impromptu removes the drill-through filter and displays all the data in the drill-through report.
- To quickly open a drill-through report, double-click a value associated with a drill-through report, right-click a value and select Drill Through from the menu, or select a value and press Enter.
- To save a drill-through report, click the Save As command (File menu).
- To drill through from a chart, select the entire chart.

What if ...

- The Drill Through command and the Drill Through button are not available?

  No drill-through report is available for the value you have selected or you have selected multiple columns or rows. Drill-through reports are available only when you select a single value.
- The Drill Through Properties command from the Drill Through drop-down menu is not available?

  The Enable Drill-Through Properties check box (Options dialog box, Tools menu) is not selected.
- The drill-through report contains no data?

  There is a conflict between the main report and the drill-through report. For more information, see your administrator.

Related Topics

- "Drill Through to Cognos Query" (p. 125)
- "Set Up Drill-Through Access to Cognos Query" (p. 126)
- "View a Report" (p. 9)
- "View an Existing Report" (p. 9)

Change the Page Layout View of a Report

Description

Two different views are available when you work in Impromptu. The view you choose depends on the type of work you are doing.

- Use Screen Layout view for inserting graphics or comments. Screen Layout view is good for editing and formatting text, and for screen-only reports.
- Use Page Layout view to reduce the view so you can see the edges of your report. Use this view to see page numbers if you've included them in your report. You can also see the layout of the report page including page headers and footers. What you see in Page Layout view is how your report will look when it is printed.

Step

- From the View menu, click Screen Layout or Page Layout.

More Info

Notes

- Page layout view is only available if a default printer is defined.
- The results of the Fit to Page and Repeat This Column on Every Page options are not visible in the Screen Layout view.

- The results of the Fit to Page option are not visible in the Page Layout view. You can only see the scaled down columns when you preview a report before printing, or when you print the report.

Tips

- To quickly move between the Screen Layout view and the Page Layout view, use the toolbar buttons.

Screen Layout button

Page Layout button

- To take a closer look at your report, click one of the Zoom buttons on the toolbar. You can also reduce the view to see the entire page and make layout decisions easier. You can continue working on the report after enlarging or reducing the view.
- To enlarge the view in 25% increments, click the Zoom In button.
- To reduce the view in 25% increments, click the Zoom Out button.
- To fill the whole page, click the Whole Page button.
- To zoom in to 100%, click the 100% button.
- To zoom in to fit the page width, click the Page Width button.

Related Topics

- "View a Report" (p. 9)
- "View an Existing Report" (p. 9)

Chapter 2: View a Report with a Web Browser

Description

Anyone with a Web browser can view a report that is saved as Hypertext Markup Language (HTML). To view HTML report output, you do not require Impromptu.

Depending on how the HTML report is distributed, you can view it either

- directly on a Web page by clicking the button set up to launch the report
- by downloading the required HTML files from email or from a network folder and opening the main HTML page on your computer

You cannot update an HTML report with new data.

Step to View an HTML Report on a Web Page

- Click the button on the Web page that launches the report.

Tip

- Save the report to a folder called my report to keep all related files together.

Steps to View an HTML Report

1. Copy all the HTML report files from email or the network folder where they are located.
2. Open the main HTML page.

   Example: C:\Report1\index.htm

   You can open the file by

   - double-clicking it in Windows Explorer
   - using the Run command
   - starting your Web browser first, then indicating the location and name of the main HTML page.

More Info

Note

- Printing capabilities for HTML reports depend on the browser you are using. You cannot print multiple pages of an HTML report and, depending on your browser, if you specify more than one page in the print range, a blank page may print. For more information about printing HTML reports from within a browser, see your browser help.

What if ...

- You get a blank page when you print an HTML report?

  You did not select the report before sending it to print. Open the HTML report in your Web browser and click the middle of the report. Note that there is no visual indication that the report is selected.

Related Topics

- "Export a Report to Other Applications" (p. 22)
- For information about creating HTML report output, see *Mastering Impromptu Reports*.

Chapter 3: Print a Report

Description

Using the Print Preview command, the Page Setup command, and the Print Setup dialog box, you can

- preview your report, page by page, to ensure that it looks exactly the way you want it to look when it is printed
- set the margins, determine where headers and footers are printed, and set where to start a new page
- choose the printer you want to use, the page orientation, the size and the source of paper, as well as a whole range of options for fonts, graphics, and memory
- temporarily override the paper size and orientation you set using the Page Setup command by clicking Setup in the Print dialog box. What you see in the Print Setup dialog box from the Print dialog box is dependent on the printer you have installed

Using the Print command, you can

- choose to print all the pages or a range of pages in your report
- select the print quality of your report
- specify the number of copies you want printed and whether or not you want them collated

Note

- In addition to printing a report, you can keep a copy of your current data by using a local snapshots, or the Save As command (File menu). You can also use the Copy and Paste commands (Edit menu) to move your data to another application.

Steps

1. From the File menu, click Print.
2. Do one of the following:
   - To print the entire report, click OK.
   - To print the current page only, in the From and To boxes type the current page number, and click OK.
   - To print a range of pages, in the From box type the number of the first page you want to print, and in the To box type the number of the last page you want to click. Click OK.
   - To print more than one copy, in the Copies box type the number of copies, and click OK.
   - To print to a file you specify in the Print to File dialog box, click Print to File, and click OK.

More Info

What if...

- You want to change how the printer is set up?

  In the Print dialog box, click the Setup button. In the Printer box, select the printer and then click Properties.
- You want to change the orientation of your report?

  In the Print dialog box, click the Setup button. In the Orientation box (Print Setup dialog box), select Portrait or Landscape.
- You want to print a wide list report?

Use the Fit To Page check box (Page Setup dialog box) or the Repeat This Column on Every Page check box (Text Properties dialog box). See "Print a List Report With Repeating Columns" (p. 18) for more information.

Related Topics

- "Preview a Report" (p. 16)
- "Print a Wide List Report on a Single Page" (p. 17)

Preview a Report

Description

You can preview your report before you print it. Print Preview shows you all the parts of your report in their positions on the page. You can see a full report page or the actual page size and move to the next or previous page. You can also see one or two pages at a time, or zoom in and out on the report.

Steps

1. From the File menu, click Print Preview.

   Impromptu shows a page view of your report. You cannot edit your report while you are in print preview.
2. Do one of the following:
   - To preview the next or previous page, click the Next Page button to go forward a page in the report. Click the Prev Page button to go backward a page in the report.

     The Next Page button is unavailable once you have reached the end of your report. The Prev Page button is unavailable when you are at the first page of your report.
   - To switch from viewing a single page to viewing two pages, click the Two Pages button.

     The button name changes to One Page. You can click this button to switch back to one page.
   - To switch from full page view to actual size view, click the Zoom In button on the toolbar. To zoom in closer, click the Zoom In button again. The Zoom In button is unavailable once you have clicked it twice.
   - To return to full page view, click the Zoom Out button. You may have to click it twice to get back to full page view. The Zoom Out button is unavailable once you are in full page view.
   - To return to your report, Click Close.

Related Topics

- "Print a Report" (p. 15)

Set Up the Printer

Description

You can change the current printer or the print setup options. You can

- choose a different printer (if you have access to more than one printer). The Print Setup dialog box indicates the printer to which you are currently connected
- change the paper source for the printer you want to use. The choices you have are limited to your current printer selection
- temporarily override the paper size and orientation settings using the Page Setup dialog box. This will not change the default printer settings

Steps

1. From the File menu, click Print.
2. Click Setup.
3. In the Print Setup dialog box, do one or more of the following:

- To select a printer from the list, select the printer name in the Name box.

Note: Only installed printers appear in the list.

- To temporarily override the specified paper size, select the paper size in the Size box.
- To specify a paper source, select the paper source from the Source box.
- To temporarily override the specified orientation of the report, click either the Portrait or Landscape option button from the Orientation box.

4. Click OK.

   Impromptu saves your new printer settings (except for changes to the paper size and orientation) and returns you to the Print dialog box.

5. Do one of the following:
   - If you want to print based on the settings in the Print Setup dialog box, click OK.
   - If you want to save the new printer setting in the Print Setup dialog box, but you do not want to print, click Cancel.

More Info

Notes

- The default printer is always the printer you have selected as the default printer in the Windows Printers settings.
- Your report can exceed the paper size supported by your printer. To print a wide list report, see "Print a Wide List Report on a Single Page" (p. 17).
- List reports and crosstab reports print on multiple pages; other reports are clipped. For example, if the list report contains more columns than can fit on a single page, additional columns print on the next page unless you've set the Fit to Page option (Page Setup dialog box).

Related Topics

- "Print a List Report With Repeating Columns" (p. 18)
- "Print a Report" (p. 15)

Print a Wide List Report on a Single Page

Description

If you have a wide list report with many columns, you can automatically scale it down to a single page. This allows you to keep information together on one page. As a result, your report is easier to understand.

Steps

1. From the File menu, click Page Setup.
2. In the List Frames box, select the Fit to Page check box.
3. Click OK.

More Info

Notes

- Fit To Page does not affect the Page Layout view or Screen Layout view of a report.
- Fit To Page scales down a wide list report while maintaining the horizontal/vertical ratio.
- Fit To Page should not be used with the Repeat This Column on Every Page option.
- Fit To Page has no affect on how Impromptu Web Reports displays your report in PDF format. For more information about preparing reports for Impromptu Web Reports, see "Prepare a Report for Impromptu Web Reports" (p. 127).

What if ...

- The Fit To Page check box is unavailable?

You are not working on a list report. The Fit To Page check box is only available for list reports.

- The report is difficult to read after you select the Fit To Page check box?

  The report is too wide for the Fit To Page check box to be useful. You may want to repeat a column on every page instead.
- Part of the list report is cut off when you preview or print the report?

  The width of the list exceeds the physical page size. Select a value in the list. From the Edit menu, click Select Parent. From the Format menu, click Properties. Ensure that the box indicating width is set to Parent or is set to a specific width that is less than the physical page width.

Related Topics

- "Preview a Report" (p. 16)
- "Print a List Report With Repeating Columns" (p. 18)
- "Print a Report" (p. 15)

Print a List Report With Repeating Columns

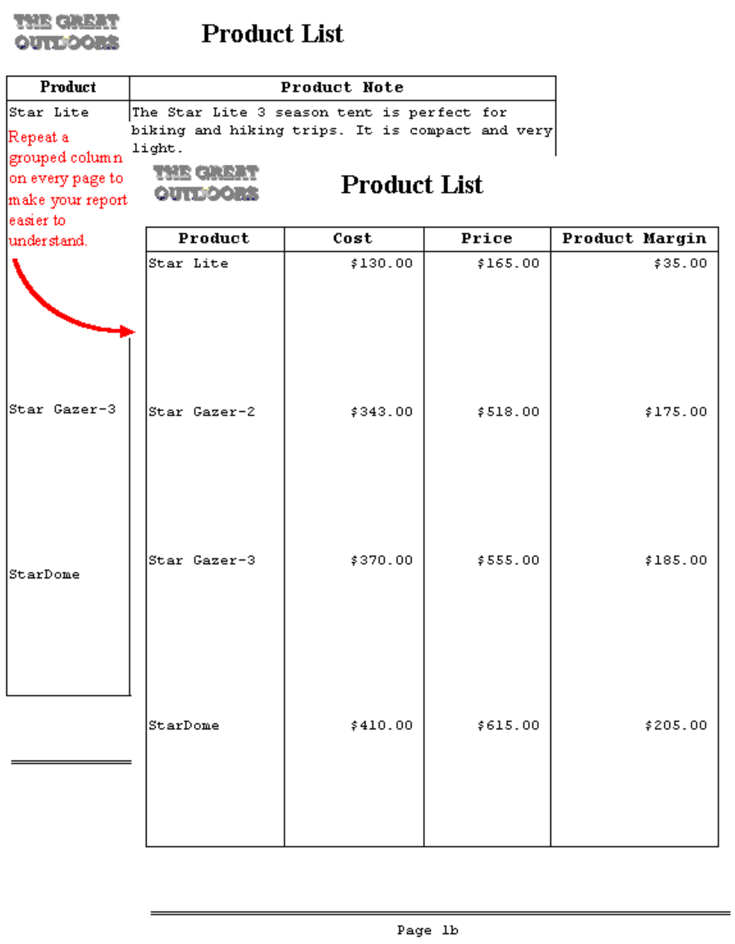
Description

You can use the Repeat This Column on Every Page check box to repeat one or more columns in a list report on every printed page (after the page where the repeating column first appears). When a report is too wide for one page, the additional columns are placed on the next page to the right. For page 1, the next page to the right is 1b. If you make a column on page 1 the repeating column, it becomes the first column on page 1b.

This can be useful if your report is too wide to fit on a single page or too wide to be readable when scaled down using the Fit To Page option.

When you repeat columns, the context of the information is maintained, ensuring that every page of your printed report is easy to understand. You can resize or edit repeat columns and the changes are automatically applied to the original column on the page that it first appears, as well as to all the columns that repeat on subsequent pages.

Example



Steps

1. Select one or more columns in your report.
2. From the Format menu, click Properties, and click the Printing tab.
3. Select the Repeat This Column On Every Page check box.
4. Click OK.

More Info

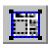
Notes

- The Repeat This Column on Every Page option does not affect the Screen Layout view of a report.
- The Repeat This Column on Every Page option can also be applied to the row area of a crosstab. It cannot be applied to either cells or columns.

What if ...

- You want to see which columns repeat?

  Select a value or column in your report. Click the Select Parent toolbar button. From the Format menu, click Properties and click the Printing tab.

  Select Parent button
- Columns do not repeat when you preview or print a report?

The Fit To Page option may be enabled. From the File menu, click Page Setup and click the Printing tab. In the List Frames box, ensure that the Fit To Page option is cleared.

Related Topics

- "Preview a Report" (p. 16)
- "Print a Report" (p. 15)
- "Print a Wide List Report on a Single Page" (p. 17)

Chapter 4: Export a Report

One way of sharing data between an Impromptu report and another application is to save the report in the file format of the other application. Saving your data in another file format is one way to keep a permanent copy of the current data.

File Formats Available for Exporting

Save Your Report As ...	To ...
HotFile (.ims) HotFiles are used to access data from several databases	Use the results of your report as database tables in another catalog
Impromptu Query Definition (.iqd) Transformer uses information in the .iqd file to retrieve the data directly from your database when generating data in your model. For information about creating a model to use in PowerPlay, see the documentation for PowerPlay Transformer. Cognos Visualizer uses information in the .iqd file to retrieve the data directly from your database when generating a visualization. For information about creating a visualization to use in Cognos Visualizer, see the documentation for Cognos Visualizer. If you save an Impromptu report that contains Access Security Tokens as an .iqd, Impromptu treats these values with special rules. The Access Security Tokens are: 1) catalog-user-profile, 2) user-name, and 3) user-classes. For more information, see the Impromptu Online help.	Create a source file for a PowerPlay Transformer model
Excel with Format (.xls)	Analyze your data in a spreadsheet and keep the report formatting. You can save your reports in Excel 2000 format or Excel 2002 and higher format (default).

Save Your Report As ...	To ...
Delimited ASCII (.csv) Dates are exported as *YYYY-MM-DD hh:mm* or as *YYYY-MM-DD hh:mm am/pm*. The latter format is used when <ITime> is set to 0 in the cerlocale.xml file. When you use this format for a Transformer model, Transformer automatically identifies the data items in the file, and assigns them default names. The default names are based on the data item values in the file's first record. Note the data item names that you are saving so you can assign the correct names in your model later.	Use an ASCII file as a source file for a PowerPlay Transformer model, when you do not have to connect to the database to retrieve the data for the model
XML (.xml)	Use the Impromptu report in XML applications
Portable Document Format (.pdf)	Create a report in printable format
Hypertext Markup Language (.htm)	View a report using a browser
Data File (.dat)	Analyze your data using PowerPlay
Text (.txt)	Transfer the results of an Impromptu report to other applications that cannot import Impromptu reports directly
SQL (.sql)	Use the SQL (Structured Query Language) statements that created the Impromptu report
dBASE (.dbf)	Use data in your report as a dBASE database

Related Topics

- "Attach a Report to Email" (p. 24)
- "Export a Report to Other Applications" (p. 22)
- "CSV File Format" (p. 24)

Export a Report to Other Applications

Steps

1. From the File menu, click Save As.
2. Locate the folder where you want to save the file.
3. In the File Name box, type a name for the file.
4. In the Save As Type box, select the file format you want.
   - When you save a report as Excel, you can specify the version of Excel to use (p. 24).
   - When you save as a dBase file, you save the data only.

     The dBase field names are based on the data items listed in the Data tab (Query dialog box).
   - When you save as a delimited ASCII file, you save the data only.
   - When you save as an SQL file, you save the SQL statements that Impromptu uses to retrieve the data.
   - When you save as a text file, you save the data and the column titles.
   - When you save as an Impromptu Query Definition file, you save the formatting and the commands required to retrieve the data from the database.
5. If you save the report as a dBASE (.dbf), Hypertext Markup Language (.htm), or Delimited ASCII file (.csv), click Options to set options on how to export the file.

6. Click Save.

   Impromptu makes a copy of the existing file and stores it in the folder you selected, using the file name you typed and the extension that matches the new format. The original Impromptu version of the report or template remains open on your screen.

More Info

Notes

- Impromptu Query Definition (.iqd) files contain no security information. If the report contains information some users should not see, you must set up the appropriate security in the target Cognos application.
- Hypertext Markup Language (.htm) files and Portable Document Format (.pdf) files can be rendered with a Report Navigator which adds navigation links to report output. To add a Report Navigator, use the Navigation tab of the Report Properties dialog box.

Related Topics

- "Export a Report" (p. 21)
- "Render a Report in Excel Format" (p. 24)
- "CSV File Format" (p. 24)
- "Add Report Navigation" (p. 23)

Add Report Navigation

You can add a Report Navigator to your report output to set navigation based on one or more grouped columns. The columns serve as bookmarks in PDF report output and table of contents entries in HTML report output.

For items to appear in the Report Navigator, the selected columns must be visible in the report. In addition, only grouped and associated columns are available for selection. If you do not have any grouped columns in your report, you cannot add columns to the Report Navigator.

A Report Navigator is recommended for multipage reports. However, if your report fits on one page, a Report Navigator is not required.

Steps

1. With a report open, from the **Report** menu, click **Navigation**.
2. Select the **Include report navigator** check box.
3. In the **Available columns** box, select the check box next to one or more of the grouped or associated columns that you want.
4. For HTML report output, specify the following HTML navigation properties that you want.

Goal	Action
Include a list of page numbers in the report navigator, which link to specific pages in the report body	Select the **Include page numbers** check box
Remove duplicate entries in the report navigator caused by horizontal page breaks	Select the **Suppress duplicate entries** check box

5. Click **OK**.

   Tip: If you later want to remove all bookmarks in your report output without changing the settings in the Available Columns box, clear the **Include report navigator** check box. The Bookmark tab remains in the PDF report output when you view a report in Adobe Reader. This is expected Adobe behavior.

Related Topics

- "Create a Report" (p. 29)

Render a Report in Excel Format

When you export a report to Excel (p. 22), you can choose to render it as Excel 2000 or Excel 2002 and higher. Reports rendered as Excel 2000 have limited rendering. Reports rendered as Excel 2002 and higher have complete rendering of report objects.

There are a number of best practises recommended when exporting reports to versions of Excel 2002 and higher. For information about designing reports for Excel, see *Mastering Impromptu Reports*.

Steps

1. Open a report.
2. From the **Report** menu, click **Excel**, and in the **Version** box, click the Excel version to use.
3. If you want to, you can include the following objects with the **Excel 2002 and higher** version by clicking the check box next to the object:
   - images
   - static charts
   - text frames
   - summary expressions
4. Click **OK**.

Related Topics

- "Create a Report" (p. 29)

Attach a Report to Email

Description

If you use Microsoft Mail, Exchange, or Outlook, you can send a report as an attachment to an email message to users who have access to the report catalog.

Step

- From the File menu, click Send.

  The report appears as an attachment to a new Microsoft Mail, Exchange, or Outlook message.

More Info

Tip

- If your users don't have access to the report catalog, save the Report as a snapshot and then send the report.

Related Topics

- "Export a Report" (p. 21)

CSV File Format

You can export data as delimited text using many of the Cognos products. In PowerPlay for Windows, you can export data as a delimited ASCII text file (.asc). In PowerPlay Web and Cognos Query, and Impromptu and Impromptu Web Reports, you can export data as a Comma Separated Value file (.csv).

Delimited text format is one of the most popular export formats, because the resulting file can be used as an import source by many applications. The updated delimited text format used in Series 7 ensures a high degree of compatibility in multi-language environments. It also ensures reliability when importing into third-party applications such as Microsoft Excel.

Each Cognos product exports data to delimited text format in the same manner, as shown in the following table.

List separator	The list separator specifies what character separates items in a list. Its default value is derived from the locale settings. The list separator selected is not persisted between sessions or Save As operations. **Note:** In Impromptu, you can optionally change this character.
Export of numeric data	The decimal symbol for the locale is used, even if the format or pattern of the number contains an explicit decimal that differs from the locale. The digit grouping symbol (the symbol used to group large numbers such as thousands in the US locale) is not used in the CSV export. The negative sign symbol but not the format of the locale is used. This may also be different than the explicit format used for that number. The negative symbol is always leading. For example, for a German locale of DE_DE, a number that was formatted as "(765 000.45)" is exported to CSV format as "-765000,45".
Export of currency data	Currency values follow the same rules as numbers. The currency symbol is not exported. For example, if the locale is EN_US, and the format of the number in a PowerPlay report is "$123,456.00", then PowerPlay exports "123456.00".
Export of character data	In some products, you can optionally allow quotes to be put around the text. This technique ensures that a text field containing the list separator (such as a comma) is not interpreted as multiple fields in the exported file.
Export of date and time data	Dates are exported in ISO format, *YYYY-MM-DD* Time is exported as ISO format, *hh:mm:ss*. The hour value (*hh*) uses the 24-hour clock. **Note:** In PowerPlay, the date is defined in the Transformer model and is exported as text.

Related Topics

- "Export a Report" (p. 21)
- "Export a Report to Other Applications" (p. 22)

Chapter 5: Use Annotations

Description

Annotations describe catalog and report items that your company may already store in a relational database or metadata repository.

Your Impromptu administrator creates the annotation server, connects it to the annotation database, and distributes the server (called AnnotationServer.exe). After you copy the server to your computer and register it, you can open the annotations that describe the columns, calculations, catalog filters, and catalog prompts you use. If you don't register your annotation server to your computer, your annotation requests will fail.

You can open annotations in the Query dialog box, Folders dialog box, and any expression editor.

Steps to Register the Annotation Server

1. Copy the server (called AnnotationServer.exe) to your computer.
2. In Windows Explorer, double-click AnnotationServer.exe.

   Your annotation server is registered on your computer.

Steps to Request Annotations

1. Open the Impromptu catalog or report that contains annotations.
2. In the Query dialog box, Folders dialog box, or any expression editor, select a data item and press F1.

   The annotation server starts and shows the annotation information.

Tip

- To request annotations, you can also select the What's This? arrow (in the top-right corner of the dialog box) and then click the data item.

Chapter 6: Create a Report

What Is a Report?

An Impromptu report is a focused answer to a business problem. It is an organized and formatted view of the data requested from your company database.

What Is In a Report?

A report contains

- data

  Reports show data from your database. The Impromptu catalog contains all the information necessary for Impromptu to access and retrieve information from a relational database.

  Every time you open your report, Impromptu updates it with the most recent data.
- formatting

  You can enhance a report's appearance by rearranging and aligning parts of a report, changing the font, applying borders and patterns, setting margins, and so on.

When you save a report, you save the information and instructions about what data to get from the database and how to format the report. You do not save the actual data.

How to Create a Report

You can create a report using

- the Report Wizard
- a template

Using the Welcome Dialog Box

The Welcome dialog box appears when you first start Impromptu.

Click ...	To ...
Create a Standard Report	Use the Report Wizard to help you create a list or crosstab report quickly and easily.
Create a Report Using a Template	Create a new report using one of Impromptu's templates.
Open an Existing Report	Open a report that you previously saved.
Take a Quick Tour	Discover the possibilities available to you with Impromptu.

Using the Report Wizard

The Report Wizard asks what type of report you want to create, a list report or a crosstab report. The wizard then prompts for the title of your report, the data you want to include, and the data items to group (if applicable), and how you want to filter the data. The Report Wizard does the rest for you.

Using Templates

A template is an incomplete report. It can contain formatting, calculations, macros, and placeholders. You add the appropriate data items to the template to create a report. For example, a template may have placeholders for a customer address.

You can use a template as a pattern for creating a report. Alternatively, you can modify an existing template to suit your business needs or create your own template.

Related Topics

- "Add Report Navigation" (p. 23)
- "Create a Crosstab Sub-Report" (p. 36)
- "Create Accessible Reports" (p. 36)
- "Open a Catalog" (p. 30)
- "Upgrade a Catalog or Report" (p. 31)
- "Use a Report in Another Report" (p. 35)
- "Use a Template to Quickly Create a Report" (p. 33)
- "Use the Report Wizard to Quickly Create a List Report" (p. 31)
- "Use the Report Wizard to Quickly Create a Crosstab Report" (p. 32)
- "View a Report" (p. 9)

Open a Catalog

Description

To create or run Impromptu reports, other than snapshot reports, you must first open a catalog. You can open a different catalog at any time during your Impromptu session, but you can open only one catalog at a time.

When you open a different catalog, Impromptu, by default, automatically connects the catalog to the appropriate database and closes any open reports.

Example

You have a catalog called Sales Results that is attached to the sales database and a catalog called Accounts Receivable that is attached to the accounts database. When you close the Sales Results catalog and open the Accounts Receivable catalog, Impromptu automatically attaches you to the accounts database, not to the sales database.

Steps

Note: If there is no open catalog and you are opening or creating a report using the Report Wizard, or creating a report using a template, you are prompted to open a catalog. Proceed to step 2.

1. From the Catalog menu, click Open.
2. In the Open Catalog dialog box, locate the catalog and click Open.
3. If the Cognos Common Logon dialog appears, type your User ID and click Log On if you are using Access Manager for security.

   Otherwise, click Cancel.
4. In the Catalog Logon dialog box, select your user class from the User Class box.
5. If a catalog password is required, type it in the Password box.
6. If you have a database user ID and password, type them in the Database User ID and Password boxes and click OK.

   If you opened the catalog from the Catalog menu, the screen is blank, but a status message indicates the name of the database to which you are connected.

More Info

Notes

- If you cannot open a catalog, your administrator may have it open for maintenance.
- The last user class chosen becomes the default user class for the catalog for that user.
- If you do not know your user class, see the administrator.

Tip

- To close a catalog, click Close from the Catalog menu.
- To obtain a better view of a long list of catalogs, resize the Open Catalog dialog box.

Related Topics

- "Reporting While Disconnected From the Database" (p. 121)
- "Create a Report" (p. 29)

Upgrade a Catalog or Report

Description

If the catalog or report was created with a previous version of Impromptu, the Catalog Upgrade or Report Upgrade dialog box appears.

When you want to use, but not modify the catalog, and also want to continue using previous versions of Impromptu, click Open this Catalog as Read-Only. If you want all previous version catalogs to open as read-only automatically, click Open this Catalog as Read-Only and then clear the Show This Dialog When Opening Previous Version Catalogs check box.

When you want to view, but not modify, a report, and also want to continue using previous versions of Impromptu, click Open this Report as Read-Only. If you want all previous version reports to open as read-only automatically, click Open this Report as Read-Only and clear the Show This Dialog When Opening Previous Version Reports check box.

Steps to Upgrade a Catalog

1. To upgrade a catalog, click Upgrade this Catalog.

   Note: If you want to upgrade all previous version catalogs automatically, click Upgrade this Catalog and clear the Show This Dialog When Opening Previous Version Catalogs check box.
2. Click OK.

   Previous versions of Impromptu can no longer open this catalog.

Steps to Upgrade a Report

1. To upgrade a report, click Upgrade this Report.

   Note: If you want to upgrade all previous version reports automatically, click Upgrade this Report and clear the Show This Dialog When Opening Previous Version Reports check box.
2. Click OK.
3. From the File menu, click Save.

   Previous versions of Impromptu can no longer open this report.

More Info

What if ...

- You want to show the Catalog Upgrade dialog box or the Report Upgrade dialog box?

  From the Tools menu, click Options. Click the Show the Catalog Upgrade Dialog Box or the Show the Report Upgrade Dialog Box check box.

Related Topics

- "Create a Report" (p. 29)
- "Open a Catalog" (p. 30)

Use the Report Wizard to Quickly Create a List Report

Description

The Report Wizard is the quickest and easiest way to create a list report. The Report Wizard prompts you for the information you need to create your report.

Steps

1. If you just started Impromptu and the Welcome dialog box is open, click Create a Standard Report. Otherwise from the File menu click New, select the Simple List template, and click Wizard.
2. If the catalog is not open, open and log on to the catalog you want.
3. Type a title for your report, and click Next.
4. Click the List Report option button and follow the instructions in the Report Wizard.

   The Report Wizard creates a list report based on the information you provide.

More Info

Notes

- The Report Wizard supports any template created with Impromptu (except the Blank template).
- If the catalog or report was created with a previous version of Impromptu, see "Upgrade a Catalog or Report" (p. 31).
- You can drag and drop only one data item at a time when working with folders in the Wizard.

What if ...

- You want to create a new report using a different catalog?

  From the Catalog menu, click Close, and then create a new report. You are automatically prompted to select a catalog.
- You want totals inserted automatically in the list report?

  Click the Automatically Generate Totals check box in the Grouping page (Report Wizard). A Total summary is inserted at the lowest level of detail in the report.
- You want to quickly save a report to the User Workspace folder?

  Click the FastFind button in the Save As dialog box, and then save your report.

Related Topics

- "Create a Report" (p. 29)
- "Open a Catalog" (p. 30)
- "Use the Report Wizard to Quickly Create a Crosstab Report" (p. 32)

Use the Report Wizard to Quickly Create a Crosstab Report

Steps

1. If you just started Impromptu and the Welcome dialog box is open, click Create a Standard Report. Otherwise, click New from the File menu, select the Crosstab template, and click Wizard.
2. If the catalog is not open, open and log on to the catalog you want.
3. Type a title for your report, and click Next.
4. Click Crosstab Report, and follow the instructions in the Report Wizard.

   The Report Wizard creates a crosstab report using the information you provide.

More Info

Notes

- You must enter one data item into the Rows area, one data item into the Columns area, and one data item into the Cells area of a crosstab report.
- When you add a data item to the Cells area, Impromptu automatically summarizes the item. For example, Sale Amount becomes Total Sale Amount, and Product becomes Count Product. If you drag the item from the Cells area back to the Rows or Columns area, it remains summarized. To return to the original data item, select the item and edit its data definition.

- When you create a crosstab report using the Report Wizard, only three data items can be entered in the Cells area of the crosstab.
- BLOB columns do not appear in a crosstab report.
- You can drag and drop only one data item at a time when working with folders in the Report Wizard.

What if ...

- You want to create a new report using a different catalog?

  From the Catalog menu, click Close, and then create a new report. You are prompted to open a catalog.
- You want to quickly save a report to the User Workspace folder?

  Click the FastFind button in the Save As dialog box, and then save your report.

Related Topics

- "Create a Crosstab Sub-Report" (p. 36)
- "Create a Report" (p. 29)
- "Open a Catalog" (p. 30)
- "Use the Report Wizard to Quickly Create a List Report" (p. 31)

Use a Template to Quickly Create a Report

Description

Templates can save you time and effort when you create new reports. Templates are particularly useful when you frequently create the same type of reports.

The template you use may contain placeholders.

Four types of placeholders can appear in a template:

- optional single-column
- optional multi-column
- required single-column
- required multi-column

You can skip or fill in optional placeholders. You must fill in required placeholders.

You can fill in a single-column placeholder with one data item from the catalog and you can fill in a multi-column placeholder with at least one data item from the catalog.

Example

You use a template to create mailing labels. The template contains placeholders for Contact Name, Contact Title, Company, Street, City, State, and Zip Code. The Contact Title is an optional placeholder and the Street placeholder is a multi-column placeholder. You fill in the contact's name, but you don't know the title for the contact person so you skip the contact title placeholder. To include both a street address and a suite number, you fill in the placeholder Street with two data items: Street and Suite Number.

Steps

1. If you just started Impromptu and the Welcome dialog box is open, click Create a Report Using a Template. Otherwise, click New from the File menu.
2. Select the template you want to use, and click OK.

   If the current folder does not contain the template you want to use, select another folder.

   If you do not have a catalog already open, the Open Catalog dialog box appears, where you can locate and select the catalog to use.
3. In the Catalog box (Data tab), select one or more data items from the folders.

   
   Data item icon
4. Click the right arrow button to add the selected data items to the Query Data box.

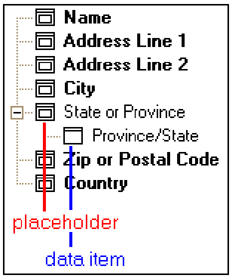
Add button

5. Repeat steps 3 and 4 until you have added all the data items you want, and click OK.

More Info

Notes

- All required placeholders appear in bold type and must be filled in.
- When you use a template to create a crosstab report, you must fill in at least one row placeholder, one column placeholder, and one cell placeholder.
- Placeholders only accept data items of the same data type.



- If a placeholder accepts only one data item, the placeholder is unavailable once you fill it in.
- You can drag and drop only one data item at a time when working with folders.
- If the catalog was created with a previous version of Impromptu, see "Upgrade a Catalog or Report" (p. 31).
- You can only expand placeholders in the Data tab.
- Selecting the Blank template (in the New dialog box) allows a user to create a report with no template. Impromptu automatically creates the Blank entry in the New dialog box, there is no Blank template file.

Tips

- To quickly add a single data item to the Query Data box, double-click the data item in the Catalog box. It is automatically added to the next available placeholder of the same data type. If there are no available placeholders of the same data type, the data item is put at the end of the list.
- To quickly fill in placeholders, drag a data item from the Catalog box and drop it onto a placeholder in the Query Data or Placeholders box (Report Wizard). The placeholder accepts the data item if it is of the same data type. If the placeholder is of a different data type than the data item, the data item fills the first available placeholder of the same data type. If no placeholders are of the same data type, the data item is put at the end of the list.

What if ...

- You want to use the same template with a different catalog?

  From the Catalog menu, click Close and then create a new report.
- No data appears in your report after you have selected the data items in the Query dialog box?

  You are using the Blank template. This template is for creating customized reports. Select a different template.
- The data item you add to the Query Data box is appended to the end of the placeholder list instead of filling in a placeholder?

  There was no available placeholder of the same data type as the data item. This data item appears in the report.
- You want to remove a data item from a placeholder?

  Select the data item in the placeholder and click Remove.
- You want to quickly save a report to the User Workspace folder?

  Click the FastFind button in the Save As dialog box and then save your report.

Related Topics

- "Create a Report" (p. 29)
- "Apply a Template to an Existing Report" (p. 75)

Import a Query from Cognos Query

Description

You can import a query from Cognos Query using the default template as set in the File Locations tab of the Options dialog box.

You can only import queries from Cognos Query version 6.0 and above. When you import a query, a log file called CognosQueryImport.log is created. To set the location of this log file, specify a folder in the Cognos Query Log File Location box in the File Locations tab of the Options dialog box.

Tips

- To avoid confusion when importing Cognos Query (.cq) files, select a catalog that was created from the same Architect package that the query was created with.
- To set the title of the report from the imported .cq file, ensure that the default template has Text Frame named "Title".
- To control the format of the report resulting from the imported .cq file, change the default template for Impromptu or change the primary frame for the default template. All the calculations and columns from the default template will be added to the primary frame of the default template.

Steps

1. Open Impromptu.
2. From the Tools menu, click Import Cognos Query.

   The Import Cognos Query dialog box appears.
3. In the Cognos Query Filename box, specify the Cognos Query file (*.cq) to import into Impromptu and click Open.
4. In the Catalog Location box, specify file name of the catalog and click Open.

   The file name of the catalog must match the name specified in the Cognos Query file. For example, if the query file contains the entry catalog=salesdb, then the catalog file name must be salesdb.cat.
5. Click Import.

   When the query is successfully imported, a dialog box appears that shows the number and type of information messages generated and that prompts you to open the import log file.
6. View your Impromptu report.

Related Topics

- "Drill Through to Cognos Query" (p. 125)

Use a Report in Another Report

Description

Like HotFiles, columns and tables from Impromptu reports can be added as data items to another report. You can use any Impromptu report (except crosstabs) as a data source for another report as long as both reports are from the same catalog.

Reusing reports was introduced to support stored procedures as a second report is required to apply formatting to the data returned from the database. However, reusing reports need not be limited to stored procedures.

Note: You can only use a stored procedure report in another report if it has been run at least once and it returns a result set.

Reusing reports saves you time when building queries, but may cost processing time because the result set of the reused report is locally cached when you execute the current query.

Steps

1. Open a new report or an existing report.
2. Open the Query dialog box and click the Data tab.
3. In the Data Source box, click HotFile and then browse to directory containing the report to reuse.
4. Click OK.

   The report to reuse is shown in the Report Directory box.
5. Double-click the report folder to expand it and then select the data items for the current report.

Related Topics

- "Create a Report" (p. 29)

Create a Crosstab Sub-Report

Description

Impromptu supports crosstab sub-reports. You can have a main query and several crosstab sub-reports in the same report.

You can convert list frame sub-reports to crosstab sub-reports the same way you convert list frames to crosstabs: pivot a column and click the Build Crosstab button in the Query dialog box.

You can't drag crosstab sub-report columns into another crosstab. Other drag-and-drop actions are allowed, including dragging columns into the same crosstab sub-report or dragging columns from another frame into the crosstab sub-report.

You can only link the crosstab sub-report query to the main query in the crosstab detail and crosstab summary filters.

Steps

1. Open a report that has at least one query.
2. From the Insert menu, click Sub-Report and then click Crosstab Frame to add a new crosstab sub-report.

Related Topics

- "Create a Report" (p. 29)
- "Use the Report Wizard to Quickly Create a Crosstab Report" (p. 32)

Create Accessible Reports

Cognos is committed to assisting people with disabilities, and promotes initiatives that make workplaces and technologies accessible. For example, Cognos Series 7 provides a report-reading solution for accessibility. This report-reading solution is currently available in English. In addition to the English report-reading solution, the Upfront Accessible theme can be read in English and French.

To create reports accessible to disabled users, you must enable accessibility in Configuration Manager. There are also certain design considerations that you must apply when creating accessible reports. For more information, see the Impromptu *Administration Guide*.

Note

- PDF documents that support software accessibility guidelines contain additional markup information that increases the size of the PDF file produced and, as a result, may impact performance. For more information about performance and accessibility, see the *Planning Advanced Installations Guide*.

Related Topics

- "Create a Report" (p. 29)

Retrieve Data from the Database

When you open a report or add data to a report, Impromptu automatically goes to the database and retrieves the data you require. You can turn automatic data retrieval off and manually retrieve data to improve performance.

Example

You are working with a large database. You want to re-order the report columns without waiting for Impromptu to retrieve the data each time you move one column. You turn the automatic data retrieval off, and re-order the columns in your report. Once you have finished, you manually retrieve the data from the database.

Steps

1. If automatic data retrieval is on, click Query from the Report menu and click the Access tab.
2. In the Query Options box, clear the Automatically Retrieve Data check box and click OK.
3. From the Report menu, click Retrieve.

   Impromptu updates the data.

More Info

Note

- Impromptu cycles through three steps when retrieving data. First, Impromptu prepares the data. Next, Impromptu scans the data for the best fit, and lastly Impromptu generates the report.

Tips

- You can also turn off automatic data retrieval by clicking the Auto Retrieve button. When the button is not depressed, Auto Retrieve is turned off.
- To add the Auto Retrieve button to the toolbar, click Toolbars from the Tools menu. From the Categories box, select Report. Click and drag the Auto Retrieve button onto the toolbar.

What if ...

- You want to cancel data retrieval?

  The status line reflects the processes that Impromptu cycles through when retrieving data. When canceling a query is possible, the status line includes both a button on the left that lets you cancel the query, and a message stating that you can cancel the query by pressing the Esc key.

Related Topics

- "Add or Remove Data" (p. 39)

Multiple Instances and Versions of Impromptu

You can open multiple instances of Impromptu, each operating independently of each other. Each instance can open the same catalog (or a different one). To avoid conflicts between instances using the same catalog, make changes to the catalog using the first instance of Impromptu that accesses it. When you open Impromptu, it recalls custom settings, such as toolbars and file locations, from the most recently closed instance.

You can also install multiple versions of Impromptu on your computer at the same time. For example, you can install Impromptu 7.4 and an earlier version of Impromptu, or Impromptu 7.4 and a current or earlier OEM version of Impromptu. Use multiple versions of Impromptu to keep your existing version and test a newer version at the same time.

The following change has been made to Impromptu to handle multiple versions.

Configuration Settings

Impromptu stores product configuration information in Cer*n*.ini in the Bin folder where Impromptu is installed. The exception is database connection information which remains in Cognos.ini. In previous versions, information maintained in the Cognos.ini file could be overwritten by newly installed versions.

Related Topics

- "Change the Number of Instances of Impromptu" (p. 38)

Change the Number of Instances of Impromptu

Description

By default, you can open multiple instances of Impromptu. With Impromptu set to multiple instance you can have reports from two different catalogs open at once. You can also execute more than one query at a time.

However, you may want to set Impromptu to single instance. For example, if you are running previous versions of macros that haven't been updated.

Ensure you have closed all instances of Impromptu before changing this setting.

Steps

1. Close all instances of Impromptu.
2. From the Start menu, click Run.

   The Run dialog box appears.
3. To switch to single instance, in the Open box, type "<path name>\<executable>" /SI.

   \- or -

   To switch back to multiple instance, in the Open box, type "<path name>\<executable>" /MI.

   Here are two examples:

   - "C:\Program Files\Cognos\Cer3\ImpUser.exe" /SI

     Switches to single instance for Impromptu User
   - "C:\Program Files\Cognos\Cer3\ImpAdmin.exe" /MI

     Switches to multiple instance for Impromptu Admin

   Note: If you didn't install to the default location, type your path in the Open box.
4. Click OK.

   Now you can open the number of instances of Impromptu you want.

Related Topics

- "Multiple Instances and Versions of Impromptu" (p. 37)

Chapter 7: Add or Remove Data

By default, when you add data items to a report, Impromptu adds them to the query and automatically marks them for insertion in the open report. You can add data items to a query without showing them in a report. This enables you to use data items in calculations and filters without them appearing in the report.

Each time you make changes to a report, Impromptu automatically retrieves the data you require from the database. To save time when adding or removing data from a report, you can turn automatic data retrieval off. For more information, see "Retrieve Data from the Database" (p. 37).

What You Can Do

Within a report, you can

- add data items, calculations, and summary operations
- sort, group, and filter data to create concise and meaningful reports
- edit the names or definitions of data items, calculations, and summary operations to make them more relevant

Related Topics

- "Add Data to an Existing Report" (p. 39)
- "Remove Data from a Report" (p. 40)
- "Group, Sort, or Associate Data in a Report" (p. 43)

Add Data to an Existing Report

Description

You can select data to include in a report at any time.

Example

You have a report that provides information on your customers. To include information about how they pay for their purchases, you add a data item called Payment Method.

Steps

1. From the Insert menu, click Data.
2. Click the mouse button at the position where you want to insert data.

   Impromptu shows the Data tab (Query dialog box).
3. In the Data Source box, do one of the following:
   - To insert data from the catalog, click Catalog.
   - To insert data from a HotFile or another report, click HotFile.
4. Double-click the folders to open or close them.
5. Double-click each data item you want to add.
6. Repeat steps 4 and 5 until you add all the data items you want to add to your query.

   By default, the new data items are marked for insertion into the report. A data item that is marked for insertion is identified by the following icon in the Query Data box:

   Marked Data icon
7. Click OK.

   Impromptu inserts the data items that are marked for insertion into the report.

More Info

Notes

- If you insert data into a text frame, Impromptu adds it at the beginning of the text frame in the order the data items appear in the Query Data box.
- If you insert data into a form frame, Impromptu adds it a the position where you clicked the mouse button.
- If you insert data into a list frame, Impromptu adds it a the position indicated by the highlighting.
- If you insert data into chart frame, Impromptu adds it into the list of data items for the chart frame.

  To add the new data items, click Properties from the Format menu and click the Data tab (Format dialog box). Select a data item in the Query Data box and depending on where you want the data item to appear, click the add arrow next to the Primary Axis, Secondary Axis, or Measure(s) box. The data item appears in the Chart Data box.
- If the space between two adjacent columns is highlighted, or if a data cell is highlighted, then Impromptu adds the data item as a new column.
- If a data cell in the group header or footer is highlighted, then Impromptu adds the data item to the header or footer.
- If you position the pointer over a header or footer, then Impromptu adds the data item to that header or footer.
- If you insert a large amount of data into a text frame, set the height of the frame to size dynamically so that the text frame spans pages when the text exceeds a single page.

Tip

- To quickly add data items to a report, click the Data button and click the report.

Data button

Related Topics

- "Add or Remove Data" (p. 39)

Remove Data from a Report

Description

You can remove data items from a report or from the report query. When you remove data items from the report, it is still available in the query. You can add the data item from the query back into the report at any time.

If you remove a data item from the report query, you have to add it back into the query and retrieve the data again to show the data in the report at a later time.

Example

You remove simple calculations such as totals that become redundant once you create more complex calculations, such as totals by branch and salesperson.

Steps to Remove Data from a Report

1. Select the data item.
2. From the Edit menu, click Delete.

   Note: You can also use the Cut command (Edit menu) to remove a data item from a report.

Steps to Remove Data from a Report Query

1. From the Report menu, click Query, and click the Data tab.
2. Select the data item you want to remove from the Query Data box.
3. Click the Remove left-arrow button and click OK.

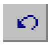
Remove button

More Info

What if ...

- You change your mind and want to restore the data item to the report?

  Click the Undo button on the toolbar.

  Undo button
- You deleted a column from your report, but it still appears in the Query Data box of the Query dialog box?

  This column is retrieved from the database every time you open your report, but it is not included in the report. To include this column in your report, see "Add Data to an Existing Report" (p. 39).

Related Topics

- "Add or Remove Data" (p. 39)

Chapter 8: Group, Sort, or Associate Data in a Report

When you group data, Impromptu sorts the data item you are grouping and removes duplicate values. By associating a grouped data item to another data item, you can eliminate duplicate information from your report.

What You Can Do

You can

- define one or more data items in your report as grouped data items
- add group headers and footers
- change the grouping order for the grouped items
- generate summaries, such as subtotals, at each group level
- associate a grouped data item with another data item
- search for a specific data item

Associating Grouped Data Items

You can associate a grouped data item with any other data item that has a one-to-one relationship with that grouped data item.

Examples

You open an ungrouped report.

Customer No.	Customer Name	Order No.	Product No.
1001	GO Outlet Montreal	24	60200
1001	GO Outlet Montreal	24	50100
1001	GO Outlet Montreal	67	50203
1001	GO Outlet Montreal	67	40302
1002	Ultra Sports 5	179	60201
1002	Ultra Sports 5	179	40401
1004	Mountain Madness 5	115	60201
1004	Mountain Madness 5	115	60402
1004	Mountain Madness 5	115	50203

You group data by Customer Name so that you can easily view your data by customer. The customer names are sorted and the Customer Name appears once for all the entries in that group.

Customer No.	Customer Name	Order No.	Product No.
1062	123 Fitness PTE Ltd	38	50100
1062		38	40302
1062		53	50202
1062		53	40303
1062		72	50202
1062		72	40100
1075	Act'N'Up Fitness 1	133	60402
1075		133	50201
1075		133	40300

You suppress duplicate Customer Numbers by declaring Customer Number as an associated data item.

Customer No.	Customer Name	Order No.	Product No.
1062	123 Fitness PTE Ltd	38	50100
		38	40302
		53	50202
		53	40303
		72	50202
		72	40100
1075	Act'N'Up Fitness 1	133	60402
		133	50201
		133	40300

Grouping and Sorting

Impromptu sorts grouped data by default. You must remove grouping before you can remove sorting.

You can sort on an associated data item, an ungrouped, or an unassociated data item at any time using the Sort tab (Query dialog box, Report menu).

Examples

You create a report with two data items: Customer Number and Customer Name. You group Customer Name. Impromptu sorts this grouped data by default. You then associate Customer Number to Customer Name, and sort Customer Number in descending order. Impromptu overrides the default sort on Customer Name and instead sorts on Customer Number in descending order. The default sort on Customer Name is lost.

Customer Name	Customer No.	Order No.
GO Outlet Denver	1149	159
Juan's Sports 2	1148	2
		262
		264
		265
		267
Juan's Sports 1	1147	183
Florida Sun Sports 3	1145	71
Florida Sun Sports 2	1144	100

If you group on Customer Name and you have the Order Number data item in the query, you can sort in descending order by Order Number. Impromptu sorts Order Number in descending order for each grouping of Customer Name. Customer Name, by default, is sorted alphabetically.

Customer Name	Order No.
123 Fitness PTE Ltd	72
	58
	53
	38
Act'N'Up Fitness 1	173
	133
Act'N'Up Fitness 2	140
Act'N'Up Fitness 3	131
Act'N'Up Fitness 4	44

Note

- Each time you make changes to a report, Impromptu automatically retrieves the data you require from the database.

Tip

- To save time when you group or sort data in a report, you can turn automatic data retrieval off. For more information, see Retrieve Data from the Database.

Related Topics

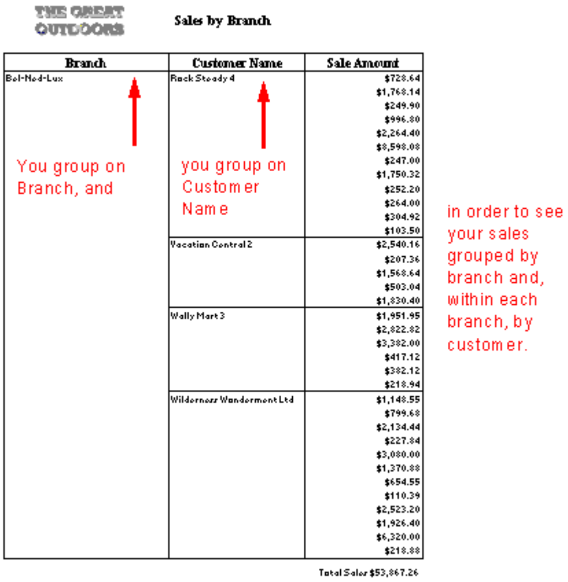
- "Associate Data to a Grouped Data Item" (p. 47)
- "Group Data" (p. 45)
- "Sort Data" (p. 46)

Group Data

Description

You can organize your report by grouping on one or more data items.

Example



Steps

1. From the Report menu, click Query, and click the Group tab.

   Note: the Group tab is not available for crosstab reports. Crosstab reports are grouped automatically.
2. In the Group Order box, select the data items that you want to group.
3. Click Group.

   A black bar across the top of the data icon indicates a grouped data item.

   Grouped data item

   Note: The grouping priority of data is set by the order of the grouped data items in the Group Order box.
4. Click OK.

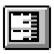
More Info

Notes

- When you group data, and grouping is done on your computer rather than by the database, text BLOBs disappear from the report.
- The Group button is unavailable if you ctrl-click more than one sub-report frame. To find out which frames in your report are sub-report frames, from the View menu click Boundary Lines.
- Impromptu groups crosstab reports automatically. All data items in the rows and columns are grouped, and data items in the cells are associated with the lowest-level data item in the columns.

Tips

- To quickly group one or more data items, select the data items in the order that you want them grouped and click the Group button on the toolbar.



Group button

- To change the group order, drag the grouped data items up or down in the Group Order box (Query dialog box) or click the Group and Associate buttons on the Group tab (Query dialog box, Report menu).

What if ...

- You want to ungroup a data item in a report?

  Double-click the data item in the Group Order box that you want to remove from the group and click OK.
- You want to quickly remove all groups from a report?

  Press Esc to ensure nothing is selected in your report, click the Group button on the toolbar, and confirm that you want to delete all group items.

Related Topics

- "Group, Sort, or Associate Data in a Report" (p. 43)

Sort Data

Description

By default, Impromptu does not sort data unless you sort or group the data item. You can sort data by

- characters in ascending order (a to z) or descending order (z to a)
- numbers in ascending order (0 to 10) or descending order (10 to 0)
- dates, from the earliest to the latest date (1995 to 1999) or from the latest to the earliest date (1999 to 1995)

Example

To make your report easier to understand, you sort on Customer Name in ascending order to list the customers in alphabetical order from A to Z.

Steps

1. From the Report menu, click Query and click the Sort tab.
2. Select one or more data items.
3. Click Ascending or Descending to specify the sort order.

   A small Ascending or Descending icon appears beside the data item you want to sort.

   
   Ascending icon

   
   Descending icon

   Note: The order of the data items in the Sort Order box determines the sort priority of the data items.
4. Click OK.

More Info

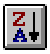
Note

- The Sort Ascending and Sort Descending buttons are unavailable if you ctrl-click more than one sub-report frame. To find out which frames in your report are sub-report frames, from the View menu click Boundary Lines.

Tips

- To quickly sort data in ascending order, select a data item and click the Sort Ascending button on the toolbar.

  
  Sort Ascending button
- To quickly sort data in descending order, select a data item and click the Sort Descending button on the toolbar.

  
  Sort Descending button

What if ...

- You don’t want to sort certain data items?

  From the Report menu, click Query, and click the Sort tab. In the Sort Order box, select the data items that you don't want to sort, click Don’t Sort and click OK.
- You want to quickly clear all sorting from data items?

  Press Esc to ensure nothing is selected in your report, click the Sort Ascending button or the Sort Descending button, and confirm that you want to delete all sorting from items.
- The Sort Ascending or Sort Descending button is not on your toolbar?

  To add a button to the toolbar, click Toolbars from the Tools menu. From the Categories box, select Report. Click and drag the toolbar button onto the toolbar.

Related Topics

- "Group, Sort, or Associate Data in a Report" (p. 43)

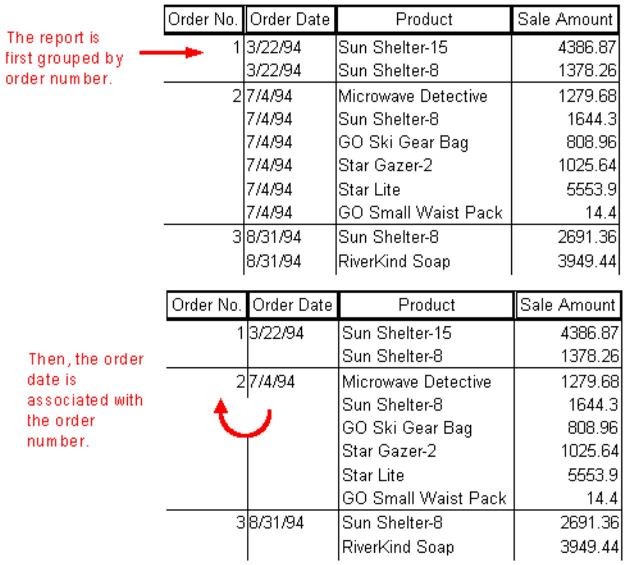
Associate Data to a Grouped Data Item

Description

You can associate one or more data items with a grouped data item. An associated data item should have a one-to-one relationship with the grouped data item. For example, Order No. is a grouped data item. For each order number, there is an Order Date. Order No. and Order Date have a one-to-one relationship.

You can associate a data item to a grouped data item to suppress duplicate information if you know that the associated data item repeats in every row of the grouped item.

Example



Order No.	Order Date	Product	Sale Amount
1	3/22/94	Sun Shelter-15	4386.87
	3/22/94	Sun Shelter-8	1378.26
2	7/4/94	Microwave Detective	1279.68
	7/4/94	Sun Shelter-8	1644.3
	7/4/94	GO Ski Gear Bag	808.96
	7/4/94	Star Gazer-2	1025.64
	7/4/94	Star Lite	5553.9
	7/4/94	GO Small Waist Pack	14.4
3	8/31/94	Sun Shelter-8	2691.36
	8/31/94	RiverKind Soap	3949.44

Order No.	Order Date	Product	Sale Amount
1	3/22/94	Sun Shelter-15	4386.87
		Sun Shelter-8	1378.26
2	7/4/94	Microwave Detective	1279.68
		Sun Shelter-8	1644.3
		GO Ski Gear Bag	808.96
		Star Gazer-2	1025.64
		Star Lite	5553.9
		GO Small Waist Pack	14.4
3	8/31/94	Sun Shelter-8	2691.36
		RiverKind Soap	3949.44

Steps

1. From the Report menu, click Query and click the Group tab.
2. Select the data item you want to associate to a grouped data item.
3. Click Associate.

   A black and white bar across the top of the data icon indicates an associated data item.

    Associated data item
4. Click OK.

More Info

Notes

- When you associate a data item, the data processing takes place on your computer.
- You can only associate a column with the last grouped column in the Group Order box. If you want to create an association with a different column, ungroup the columns, create the association, and then group them again.

Related Topics

- "Group, Sort, or Associate Data in a Report" (p. 43)

Chapter 9: Filter or Find Data

Filtering Data

A filter is a set of criteria you apply to a report to change the focus of the report. You can use a filter to emphasize information that is important to you by filtering out what is unnecessary.

Example

You focus your report on the product lines that have the highest sales in Mexico. You design a filter for the report to show the Total Sales in 1995 for Mexico ...

Branch	Product Line	Total Sales 95
Mexico	Alert Devices	61094
	Back Packs	25745
	Bio-Friendly Soaps	161962
	Carry-Bags	207528
	Cooking Equipment	34290
	Recycled Products	15642
	Sleeping Bags	19808
	Sport Wear	29952
	Sunblock	98330
	Tents	656611
	Water Purifiers	533376

... so that it shows only sales over 100,000.

Branch	Product Line	Total Sales 95
Mexico	Bio-Friendly Soaps	161962
	Carry-Bags	207528
	Tents	656611
	Water Purifiers	533376

What You Can Do

Use filters to retrieve data

- based on a data item in the report or on any data item in the catalog. For example, you can create a customer mailing list that shows just mail order customers.
- that falls between a range. For example, you can retrieve all the sales data that was collected between January and June of last year.
- based on summarized information. For example, you can retrieve information about branches with total sales exceeding $3,000.
- based on a previously calculated data item in the report or in the catalog. For example, you can retrieve information about product sales based on a complex exchange rate calculated in the catalog.
- based on a prompt that asks you to select the values on which to filter the report when you open or run the report.

Each time you filter data in a report, Impromptu automatically retrieves the data you require from the database. To save time when filtering data in a report, you can turn automatic data retrieval off. For more information, see "Retrieve Data from the Database" (p. 37).

Finding Specific Data

You can find the next occurrence of a specified value in your report. For example, you use a filter to find the next occurrence of "Los Angeles" in a customer address list, then the next, and so on. This is useful when you want to locate a specific value without removing data from the report.

Related Topics

- "Filter a Report Using a Filter Stored in the Catalog" (p. 52)
- "Filter Using Crosstab Titles" (p. 53)
- "Find Specific Data in a Report" (p. 54)
- "Quickly Filter Data Using the Filter Button" (p. 50)
- "Quickly Filter Data Using the Filter Drop-down Button" (p. 51)

Quickly Filter Data Using the Filter Button

Description

You can quickly filter the data in a report by selecting one or more values and clicking the Filter button on the toolbar.

When you select values from the same row, such as Environmental Line and Telephone Sales, your report shows only the data that contains both of these values. When you select values from the same column, such as Telephone Sales and Mail Sales, your report shows data that contains either of these values.

Example

You have a report that lists the Product and Price. You select tent in the Product column and $500 in the Price column and click the Filter button. The report shows only tents with a price of $500.

Steps

1. Select one or more values in the report.
2. Click the Filter button.

Filter button

Impromptu retrieves only the data based on the values you selected.

More Info

Notes

- You can use
- the Filter button on the toolbar to eliminate rows based on values from one or more columns in the existing report
- the Filter drop-down button on the toolbar to define a filter
- a predefined catalog condition that you access from the Filter tab (Query dialog box, Report menu)
- the Filter tab (Query dialog box, Report menu) to create complex expressions
- You can also define a filter using the Report Wizard or the Filter drop-down button. For information about using the filter drop-down button, see "Quickly Filter Data Using the Filter Drop-down Button" (p. 51).
- The Filter button is unavailable if you Ctrl+click more than one sub-report frame. To find out which frames in your report are sub-report frames, from the View menu click Boundary Lines.

What if ...

- You want to remove all filters from a report?

  Press Esc to ensure that nothing is selected in your report, click the Filter button on the toolbar, and confirm that you want to delete the existing filters.

Related Topics

- "Filter or Find Data" (p. 49)

Quickly Filter Data Using the Filter Drop-down Button

Description

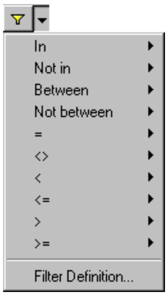
You can quickly filter the data in a report by selecting one or more values in a report and using the Filter drop-down button.

Example

You have a report that lists Customer Name, Order Date and Total Sales. You click the Filter drop-down button and select Between to filter the report so that it shows only the sales that took place within the last six months.

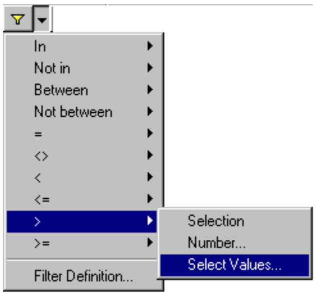
Steps

1. Select one or more values in a column.
2. Click the Filter drop-down button. A drop-down menu appears.



3. Select a filter operator from the drop-down menu.
   - To filter on the selected values, click In.
   - To filter out the selected values, click Not In.
   - To filter the selection on a given range, click Between.
   - To filter out the selection on a given range, click Not Between.
   - To filter the selection based on one or more values, click an operator such as =, <, < , <=, , =.

   Note: The contents of the Filter drop-down menu vary depending on the selection you made in step 1.
4. Position the cursor over the arrow that appears at the right of the drop-down menu. A fly-out menu appears.



5. From the fly-out menu that lists available options, do one of the following:
   - To filter a report on one or more data items currently highlighted, click Selection.
   - To enter one or more numbers upon which to filter, click Number.
   - To select from a list of values upon which to filter, click Select Values.
   - To enter one or more text strings upon which to filter, click String.
   - To enter one or more dates upon which to filter, click Date.
   - To enter one or more times upon which to filter, click Time.

- To enter a date and time variable upon which to filter, click Date-time.
- To enter one or more intervals upon which to filter, click Interval.

Note: The contents of the Filter fly-out menu vary depending on the selection you made in step 1.

6. If you chose
   - Selection, the filter is automatically applied to the report
   - Select Values, the Select Values dialog box appears, where you can choose from all the values for the selected data item
   - any of the other options, the Enter Values dialog box appears, where you can enter or select the required value or values and click OK

More Info

Notes

- You can also define a filter by using simply the Filter button. For information about using the Filter button, see "Quickly Filter Data Using the Filter Button" (p. 50).
- The Filter button is unavailable if you ctrl-click more than one sub-report frame. To find out which frames in your report are sub-report frames, from the View menu click Boundary Lines.

Tips

- To select two or more data items not found next to each other, select one data item and Ctrl+click to select the other data items.
- To remove all filters from a report, press Esc to ensure that nothing is selected in the report, click the Filter button on the toolbar, and confirm that you want to delete existing filters.

What if ...

- You only see Filter Definition when you click the Filter drop-down button?

  Nothing in your report is selected, you have selected an entire column, or you have selected values from different columns upon which to filter.

  You can use Filter Definition to create a custom filter.
- Your report data disappears when you filter between two values you have entered manually?

  The first number you entered in the Enter Values dialog box is greater than the second number. Ensure that the first number is less than the second number.

Related Topics

- "Filter or Find Data" (p. 49)

Filter a Report Using a Filter Stored in the Catalog

Description

You can filter a report using a predefined filter in the catalog. A predefined filter is a condition created by your administrator or someone else in your company, and stored in the catalog. When you use a predefined filter, Impromptu retrieves the information that meets the criteria expressed by this filter condition. Predefined filters save you time when you filter a report, because they define frequently-used or complex expressions.

Filter conditions appear with the other data items in the catalog. You can recognize a filter condition by the filter symbol in front of its name.

Filter symbol

Example

You open a report called Order Details that lists Customer Name, Order Number, Order Date, and Closed Date. You want a list of all the sales that were not closed on time so that you can determine the reasons for the delays. From the catalog, select a predefined filter condition called Sales Closed Late.

Steps

1. From the Report menu, click Query and click the Filter tab.
2. In the Abvailable Components box, double-click Catalog Columns.
3. In the Catalog dialog box, double-click the folders until you locate the required predefined filter condition.

   A filter symbol in front of the filter name identifies a predefined filter condition.

   Filter symbol
4. Select the filter condition and click OK.

   The selected filter condition appears in the Filter Definition box. You can use the filter condition on its own or you can add to it.
5. Click OK.

More Info

Notes

- You can retrieve unique rows of data by clicking the Eliminate Duplicate Rows check box in the Filter tab (Query dialog box, Report menu) to filter out repetitive information in the database.
- You can run a report without its filter by clicking the Suspend the Filter check box in the Filter tab (Query dialog box, Report menu) to retrieve data for your report without applying a filter.

What if ...

- You want to remove all filters from a report?

  Press Esc to ensure that nothing is selected in your report, click the Filter button on the toolbar, and confirm that you want to delete the existing filters.

Related Topics

- "Filter or Find Data" (p. 49)

Filter Using Crosstab Titles

Description

You can select a crosstab title and create a filter for it using the Filter button.

If you selected a crosstab column title when you created a filter, the filter is applied as a detail filter. If you selected a crosstab cell when you created a filter, the filter is applied as a crosstab detail filter or the crosstab summary filter, depending on whether the selected cell shows detail or summary values.

The Filter button is available if all of the following conditions are true:

- All selected titles are titles for columns that contain data from the database, not metadata.

  In the example below, you can use the Filter button on the Camping Chain title but not on the Product Type title, because the Camping Chain column contains data from the database (from the Customer Type table) while the Product Type column is metadata.
- All selected titles belong to the same layer in the column titles.

  In example below, you can use the Filter button on both the Fresh Air Co 1 and 2 titles together, but not on the Camping Chain and Fresh Air Co 1 titles together because they do not belong to the same layer.
- Only crosstab titles are selected.

Product Type	Product Line	Camping Chain		
		Fresh Air Co 1	Fresh Air Co 2	Fresh Air Co 3
Environmental Line	Alert Devices		58505	81969
	Bio-Friendly Soaps	202507	165307	62381
	Recycled Products		20376	8184
	Sunblock		132772	
	Water Purifiers	82129	184559	184559
GO Sport Line	Carry-Bags	33434	98114	64680
	Sport Wear	9984	16368	19136
Outdoor Products	Back Packs	1966	10316	10907
	Cooking Equipment	26642	25338	44495
	Sleeping Bags	12768	23798	8778
	Tents	47972	116292	47972

Steps

1. Open a crosstab report.
2. Select the crosstab titles you want.
3. Click the Filter button and create your filter.

Related Topics

- "Create a Crosstab Sub-Report" (p. 36)
- "Filter or Find Data" (p. 49)

Find Specific Data in a Report

Description

You can quickly find a specific value in your report when you need to locate an individual record.

Example

You have a multi-page report that details customer names and mailing addresses. You want to locate each occurrence of "Los Angeles" without removing the rest of the data from the report. You find the first occurrence of "Los Angeles", and then move to the next occurrence using the Find Next command.

If you want to search across the entire report, ensure that your report is in Screen Layout view. If your report is in Page Layout view, Impromptu searches only the current page of the report.

Steps

1. Select a value in a list.

   Note: If you do not see the value you want, select any value to open the Find dialog box.
2. From the Edit menu, click Find.

   If you are in Page Layout view, the Edit menu command is Find (on this page).
3. In the Find What box, type the value you want to find.
4. Do any of the following:
   - If you want the value in the Find What box to match whole words only, click the Match Whole Word Only check box.
   - If you want to match the case of the value in the Find What box, click the Match Case check box.
5. Click the Up or Down option button to determine the direction of the search.
6. Click Find Next.

   Each time you repeat step 6 or use the Find Next command (Edit menu), Impromptu scrolls through the report, finding the next occurrence of the specified value.

Note

- To search an entire report, ensure that you are in Screen Layout view. In Page Layout view, your search is limited to the current page.

Related Topics

- "Filter or Find Data" (p. 49)

Copy, Cut, and Paste in the Expression Editor

You can cut, copy, and paste expressions from one expression editor and paste them into another. This is a convenient way to generate expressions and is useful when you create filters for reports. You can copy a report filter from one source report and paste it into other reports, with changes if required. For example, you can cut a filter from the Filter Definition box of the Filter tab (Query dialog box) and paste it into the Expression box of the Calculation Definition dialog box.

Select an expression and then cut, copy, and paste using the standard Windows shortcuts, or using a right-click menu.

You can copy and paste text from other applications into a constant value component such as character strings or dates. However, not all expression components can be copied and pasted into various expression editors. When it is inappropriate to paste, the Paste command is unavailable.

Note: If you paste a reference to a column into the data definition of another column, using a database that doesn't contain the first column, the query will fail when you execute it.

Chapter 10: Work with Summaries

Reports frequently require a summary of the data. With Impromptu, you can add summary data items to your report. For example, you can add a Total Sales Amount or a Running Total for Orders.

While it is more efficient to add a summary data item when you create the query, you can also add a summary after you run the report.

What is a Summary?

A summary is a predefined calculation that takes one or more values, performs an operation on these values, and returns a value that summarizes the data. The summary always identifies the type of summary, such as total, and the name of the data item that you want to summarize. For example, Total (Sale Amount), Average (Product Margin). Summaries are also called aggregates.

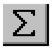
Types of Summaries

You can create both

- simple summaries
- complex summaries

Simple Summaries

You create simple summary expressions using the Summary button.



Summary button

When you click the Summary button (Query dialog box) or Ctrl+click the Total toolbar button, the Summary dialog box appears. From this dialog box you can create many summaries, including

- total
- average
- count
- maximum
- minimum
- percentage

Example

A summary with the definition Total (Sales) calculates the total sales for each branch if you put it in the Branch footer:

Country	Branch
Canada	Montreal, Que
Total Sale Amount	83002.38
	Toronto, Ont
Total Sale Amount	54895.29
	Vancouver, BC
Total Sale Amount	37750.27

It calculates the total sales for the country if you move it to the Country footer:

Country	Branch
Canada	Montreal, Que
	Toronto, Ont
	Vancouver, BC
Total Sale Amount	175647.94

Why Use Summaries?

Use summaries to see a roll-up view of the data in your report or to perform exploratory analysis on the data.

Summaries and Association

A simple summary, such as total, average, and count, is a dynamic calculation that is automatically associated with its location. When you move a simple summary, the summary changes to reflects its new location. You can explicitly associate a summary with a group so that the value does not change when you move it from one place to another in a report. This is called fixed association. For example, if Total (Sales) is associated with the Country group, you can move the Total (Sales) to the footer of the City column and the value remains as the total sales for each country.

Summaries that have fixed association include

- running-average
- running-count
- running-maximum
- running-minimum
- running-total
- standard deviation

Each time you summarize report data, Impromptu automatically retrieves the data you require from the database. To save time when summarizing report data, you can turn automatic data retrieval off. For more information, see "Retrieve Data from the Database" (p. 37).

Related Topics

- "Add a Total to a List Report" (p. 60)
- "Create a Summary" (p. 58)
- "Move a Summary to Another Location" (p. 61)
- "Use a Summary Stored in the Catalog" (p. 61)

Create a Summary

Description

You can create a summary that is a dynamic calculation that performs common calculations such as total, average, count, minimum, maximum, and percent of total. This type of summary is "smart" because it has a value that changes with its location.

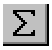
Example

You want to know the total sales generated by each of your branch offices. You open a report that lists the Branches and the Sales for each branch. The Branch column is grouped. You create a summary that totals the sales for each branch.

Steps

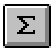
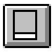
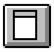
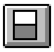
1. From the Report menu, click Query.

2. From the Catalog box (Data tab), select the column that you want to summarize.
3. Click the Summary button.



Summary button

4. In the Summary dialog box, do one of the following

Click...	To Calculate...
 Total	The total for the selected data items.
 Minimum	The minimum value of the selected data items.
 Maximum	The maximum value of the selected data items.
 Average	The average of the selected data items.
 Count	The count (number) of selected data items.
 Percentage	The percentage of the total that the data item represents.

Note: The buttons that are available in the Summary dialog box depend on the data type of the selected column. For example, if you select a column with character data, such as Products, the Total, Average, and Percentage buttons are not available. However, the Minimum, Maximum, and Count buttons are available.

5. Click OK.

   The summary appears in the Query Data box of the Data tab (Query dialog box).

6. Click OK.

   The summary appears in the report.

   - If a summary is in the body of a list that is grouped, the summary is calculated for the lowest group in the list.
   - If a summary is in a list group header or footer the summary is calculated for that group.
   - If a summary is in a form frame with the scope of the form frame set to a group, the summary is calculated for that group.
   - If none of the above are applicable, the summary is calculated for the entire report.

   You can move the summary to different areas of your report. See "Move a Summary to Another Location" (p. 61).

More Info

Tip

- To see the type of frame, click Boundary Lines from the View menu. Refer to the table in the Steps tab if you want to know where the summary appears in the report.

Note

- When you create a summary report directly, summarization takes place on the server. When you create a summary report from a detail report, summarization may take place locally on your computer. You can also set the client/server balance (Access tab, Query dialog box) to limit local processing so that the summary is done using a separate database query. This is more efficient than processing summaries on your computer.

What if ...

- You don't want totals in a report you created using the Report Wizard?

  Clear the Automatically Generate Totals check box on the Grouping page of the Report Wizard.
- You want to remove a summary from the report or the query?

  You can remove a summary from the report or query in the same way that you remove any other data item. For more information, see "Remove Data from a Report" (p. 40).

Related Topics

- "Move a Summary to Another Location" (p. 61)
- "Work with Summaries" (p. 57)
- "Use a Summary Stored in the Catalog" (p. 61)

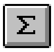
Add a Total to a List Report

Description

Reports frequently require a summary of the data. For example, you can add the Total Sales Amount for each Product in your list report.

Steps

1. Select a column header, a column, or a value in an existing list report.
2. Click the Total button on the toolbar.



Total button

More Info

Note

- If there is no grouping in the report, Impromptu puts the total in the list footer. If there is grouping in your report, Impromptu automatically creates footers (if they do not exist already) for every group in the report and inserts a group total into each footer.

What if...

- You want to count the number of selected data items excluding blank cells?

  Select a column header, a column, or a value in the existing list report and click the Count button on the toolbar.

Count button

Related Topics

- "Work with Summaries" (p. 57)

Use a Summary Stored in the Catalog

Description

You can use an existing summary that the administrator has stored in the catalog rather than creating your own summary. This saves you time and makes reporting easier. Each time you add the summary to a report, Impromptu calculates the value based on where you add the summary. If you add the same summary in three different locations (such as an overall list footer and two different levels of group footers), Impromptu automatically calculates the appropriate summary for each location.

When you select a summary from the available catalog columns for a report, the icon looks like this:

You can tell that this calculation is a summary when you view the icon in the Group tab (Query dialog box, Report menu). The icon looks like this:

To insert a catalog summary into both a list footer and a group footer, add the summary data item twice to the Query data (once for each location in the report that requires the summary).

Example

You add the Average Sale Amount summary to the Query data and insert it into an overall list footer. Impromptu associates the summary with the list report and calculates an overall average.

You move the Average Sale Amount summary into the Customer footer. Impromptu associates the summary with the Customer group and calculates the average Sale Amount for each customer.

Steps

1. From the Report menu, click Query and click the Data tab.
2. In the Catalog box, locate the summary calculation you want to use.
3. Double-click the summary calculation to add it to the Query Data box and click OK.

   The summary calculation is added to your report. The summary you inserted from the catalog is automatically associated with its location.

Related Topics

- "Create a Summary" (p. 58)
- "Work with Summaries" (p. 57)

Move a Summary to Another Location

Description

Some types of summaries, such as total, average, count, maximum, minimum, percentage of total, percentile, and rank value, are affected by their location. When you move one of these summaries to another location, how the summary is calculated and its associated group changes.

Example

You move a data item from the Total (Sales) column to the list footer. The move changes the value from the Total (Sales) for the lowest group in the report to the Total (Sales) for the whole report.

Steps

1. Select the summary that you want to move.
2. Drag and drop the summary to the new location.

Note: By default, a summary, such as total, average, count, maximum, minimum, percentage of total, percentile, or rank value, is automatically associated with its location and the value of the summary changes when it is moved to a new location. If the association of the summary is not automatic, the value of the summary does not change.

Related Topics

- "Add a Total to a List Report" (p. 60)
- "Create a Summary" (p. 58)
- "Work with Summaries" (p. 57)

Chapter 11: Insert Text, Pictures, and Other Report Variables

To heighten the impact and appearance of your report, you can insert text, pictures, or other report variables into the header or footer of your report.

What You Can Do

You can

- add comments to an Impromptu report to clarify or stress aspects of your report.
- insert a picture. A picture can appear once or several times in a report and can be static or dynamic. Unlike a static picture, a dynamic picture is associated with a data item or calculation. The database must contain a data item that identifies the dynamic picture file. For example, you insert a dynamic picture of each product into your report. If the database is updated and the picture changes, your report will reflect this change. You can also insert static pictures such as a bitmap of the company logo at the top of every order. For an example of a report that contains both a static picture (the company logo) and a dynamic picture (the product picture), see the sample report Annual Product Sales supplied with Impromptu.
- use report variables to enhance your report. A report variable is a dynamic item such as the date, time, page number, and page count. Impromptu or your computer continually updates the report variables in your report. For example, you show the system date and time when the report is printed. Also, you include the page number and the total pages in your header or footer for quick reference.

Related Topics

- "Format a Report" (p. 75)
- "Insert a Report Variable" (p. 67)
- "Insert a Static Picture" (p. 64)
- "Insert Text" (p. 63)

Insert Text

Description

You can add a comment or a title to your report to make it easier to understand. A comment can explain the source of the report data so that other people can easily understand your report, and a title can clarify the purpose and content of the report.

Steps

1. From the Insert menu, click Text Frame.
2. On the report, position the pointer where you want to locate the upper-left corner of the text.
3. While holding down the mouse button, drag the mouse diagonally to size the area where your text will appear, and release the mouse button.

   Impromptu shows a flashing I beam.

   I beam
4. Type or insert the text you want in your report.

More Info

Tips

- To quickly insert text, click the Text Frame button on the toolbar.

  Text Frame button
- To edit existing text, double-click the text until the flashing I-beam appears. Edit the text and click anywhere outside the text area.
- To have a text frame within a list frame span pages when the text exceeds a single page, set the height property to dynamic.

What if ...

- You want to delete the text?

  Select the text so that the selection handles appear and press the Delete key.
- The text you insert repeats for every row in a list?

  The active report is based on a Simple List template, or the insert pointer was placed over the list when you clicked to insert text. When using the Simple List template you can only add text to the page headers or footers of the report, or you can modify existing text in the list by double-clicking the text.

Related Topics

- "Insert Text, Pictures, and Other Report Variables" (p. 63)

Insert a Static Picture

Description

You can insert a picture and show any of the following image file formats that are stored in a location your computer can access:

- Windows bitmap file (.bmp)
- Joint Photographic Experts Group (JPEG or JPG)
- Portable Network Graphics (PNG)
- Device Independent Bitmap (DIB)

A picture can appear once or repeatedly in a report.

The picture can be static or dynamic. A dynamic picture is associated with a data item or calculation. The database must contain a data item that identifies the picture files.

Example

You insert your company logo into the header of your report.

THE GREAT OUTDOORS

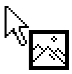
Product Information

Product Line	Product	Product Cost	Product Price
Alert Devices	Pocket U.V. Alerter	$3.00	$9.00
	Microwave Detective	$4.00	$12.00
	Pocket Radon Alerter	$13.00	$39.00
Back Packs	Day Tripper	$9.00	$14.00
	Pack n' Hike	$88.00	$131.00
	GO Small Waist Pack	$12.00	$18.00
	GO Large Waist Pack	$16.00	$24.00
Bio-Friendly Soaps	RiverKind Shampoo	$3.00	$9.00
	RiverKind Soap	$4.00	$11.00
	RiverKind Detergent	$2.00	$6.00
Carry-Bags	GO Sport Bag	$14.00	$28.00
	GO Ski Gear Bag	$16.00	$32.00
	GO Duffel Bag	$28.00	$56.00
Cooking Equipment	Dover-2	$74.00	$111.00
	GO Cookset	$36.00	$54.00
	GO Camp Kettle	$14.00	$21.00
	Dover-1	$43.00	$65.00
Recycled Products	EnviroSak	$2.00	$6.00
	Enviro-Kit	$4.00	$12.00
	Enviro-T	$10.00	$30.00
Sleeping Bags	MoonBeam	$80.00	$120.00
	MoonGlow	$86.00	$129.00
	MoonLite	$56.00	$84.00
Sport Wear	GO Headband	$5.00	$10.00
	GO Wristband	$4.00	$8.00
	GO Water Bottle	$4.00	$8.00
Sunblock	Sun Shelter-8	$2.00	$6.00
	Sun Shelter-15	$3.00	$9.00
	Sun Shelter-30	$3.00	$9.00
Tents	Star Lite	$130.00	$165.00
	Star Gazer-2	$343.00	$518.00
	Star Gazer-3	$370.00	$555.00
	StarDome	$410.00	$615.00
Water Purifiers	Pro-Lite Water Filte	$55.00	$165.00
	Pocket Water Filter	$90.00	$270.00

Steps

1. From the Insert menu, click Picture Frame.
2. Position the pointer where you want to locate the upper-left corner of the picture.

   Your pointer changes to the following:

3. While holding down the mouse button, drag the mouse diagonally to size the picture, and then release the mouse button.

   The Source tab (Picture Properties dialog box) appears.
4. Click the Load From File option button.
5. In the Load From File box, locate and select the name of the image file that you want to appear in the picture frame.
6. Select the Make a Copy Within the Report check box.
7. Click OK.

More Info

Notes

- Use small footprint JPEG (Joint Photographic Experts Group) and PNG (Portable Network Graphics) image files for improved download performance in Web-based applications.

Tips

- To paste a picture from another application, use the Copy and Paste commands.
- To quickly insert a picture, click the Picture Frame button on the toolbar.

Picture Frame button

What if ...

- You want to update the picture?

  Clear the Make a Copy Within the Report check box (Picture Properties dialog box)
- You want to remove a picture from your report?

  Select the picture and press the Delete key.
- You want to resize a picture?

  Click the picture and, while holding down the pointer over one of the handles for the selected picture, drag to size the picture, and then release the mouse button.
- The static picture you insert repeats for every row in a list?

  The active report is based on a Simple List template, or the pointer was placed over the list when you clicked to insert the picture. When using the Simple List template, static pictures can only be added to the page header or footer, the list header or footer, or the group header or footer.

Related Topics

- "Insert Text, Pictures, and Other Report Variables" (p. 63)

Insert Page Numbers

Description

Number pages in your reports to provide a point of reference when you are reviewing your printed report.

You can

- insert page numbers into your report. For example, if you want the current page number to appear in the bottom-right corner of your report, you can insert the <Page Number> report variable into the right corner of the page footer so the page number repeats on every page.
- format page numbers in your report. For example, if you want the page number to be easier to read, you can make it bold, red, and 15 point size.
- remove page numbers from your report. For example, if you added a page number, and the final report was one page, you no longer need a page number.

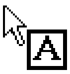
Example

You set the current page number to show in the bottom-right corner of your report. You insert the <Page Number> report variable into the page footer so the page number repeats on every page.

Steps

1. From the Insert menu, click More Objects.
2. Select the Page Number report variable and click Insert.

   Your pointer changes to the following:

   
3. On the report, position the pointer where you want the upper-left corner of the page number and drag to size the area where the page number will appear.

More Info

Notes

- Page numbers should only be inserted in the Page Layout view.
- If you insert page numbers into a list, the page numbers are inserted as a column.

Tips

- To format page numbers, select the page number. From the Format menu, click Font, and select the font type, style, size, effects, and color.
- To remove the page numbers, select the page number and press the Delete key.

Related Topics

- "Insert Text, Pictures, and Other Report Variables" (p. 63)

Insert a Report Variable

Description

You can insert report variables in your report to ensure that your report contains accurate dynamic information such as the date, time, page number, and page count. Report variables are continually updated in the report by your computer or by Impromptu.

Example

You are going to print a multi-page report.To ensure that all the pages are printed, and that the page sequence is clear, you include the page number and the total pages in the report footer.

Steps

1. From the Insert menu, click More Objects.
2. From the Available Objects box, select the report variable you want to insert in the report.
3. Click Insert.

   The pointer changes to a shape that corresponds to the report variable you are inserting.
4. On the report, position the pointer at the point where you want to locate the upper-left corner of the report variable, and drag to size the report variable.

   Note: When you insert a running page total, the Running Page Totals dialog box appears. Select the column you want to use in the running page total, and click OK.

More Info

Notes

- You can cut and paste, copy and paste, and drag and drop report variables within a single report or between different reports.
- If you paste a running page total variable into a text frame, the name of the running page total variable shown in the status line changes to the name of the text frame.

  For example, when you select the running page total variable inserted for Sales 2003, the status line shows "Running Page Total [Sales 2003]." If you paste the running page total variable into a text frame and select the variable, the status line shows the name of the text frame, not the name of the running page total variable.
- If you have not saved your report with a report name, then Impromptu uses the default report name (REPORT1). When you save the report and provide a name, Impromptu updates the report name.
- A running page total variable cannot be used in an expression or calculation.
- The system date variable is updated automatically each time you open or print a report. The <Date> format is based on your settings in the Data Format tab (Options dialog box, Tools menu).
- The system time variable updates automatically each time you open or print a report. The <Time> format is based on your settings in the Data Format tab (Options dialog box, Tools menu).

Tip

- To format a report variable, right-click the variable, and click Format. In the Format dialog box, click the Font tab, select the font type, style, size, effects, and color that you want and click OK.

What if ...

- You want to remove a report variable?
  Select it and use the Delete command (Edit menu).
- You remove a column with a running page total variable?
  The running page total variable is removed as well.
- You cannot see the running-total in a report?
  From the View menu, click Page Layout.

Related Topics

- "Insert Text, Pictures, and Other Report Variables" (p. 63)

Chapter 12: Hide, Show, Group or Resize Parts of a Report

Hiding, Showing, or Unhiding Part of a Report

You can hide, show or unhide parts of a report at different times. Hiding parts of a report does not remove them from the report. The hidden parts of a report no longer show, however, you can continue to use them.

For example, you can use the values for hidden data items in filters and calculations, and the data items still appear in the Data tab (Query dialog box).

In a list report, you can hide, unhide or show

- headers and footers. This is useful when you want to concentrate on the report details and not view headings and summary information in headers and footers.
- individual columns. You can control the information that appears in the finished report. For example, you want the item Salary as the detail lines in an employee report, but you do not want the salaries shown when you distribute printed copies of the report to others so you hide the Salary data item.

Grouping Parts of a Report

You can group parts of a report so that they are treated as a single entity. This makes it much easier for you to show, hide, resize, or format the entire group at once without having to deal with the individual parts of a report one at a time. You can ungroup a grouped section at any time.

Resizing Part of a Report

You can resize part of a report to improve its overall appearance. There are several resize options you can use to format your report. You can use the mouse to resize areas of your reports or you can use the following resize options.

- Snap to Parent. You can snap a part of a report to match the size of its parent frame. For example, if you want to create a list that takes up the entire width and height of a page, use Snap to Parent.
- Dynamic Height. You can vary the height of part of a report based on the data using the Dynamic Height option. This option can only be used with text.
- Specify Width and Specify Height. You can set the exact width and height of a selected report part to meet your specific requirements. For example, you can specify a 3.5 in. x 5 in. (8.75 cm x 12.5 cm) area in the top left area for the customer address.
- Scan Data for Best Width and Scan Data for Best Height. You can size part of a report to fit the data using the Scan Data for Best Width or Height options.

Related Topics

- "Group Parts of a Report" (p. 71)
- "Hide Part of a Report" (p. 70)
- "Resize Part of a Report" (p. 72)
- "Show Part of a Report" (p. 70)
- "Stack Parts of a Report" (p. 72)
- "Unhide Part of a Report" (p. 70)

Hide Part of a Report

Description

Hiding parts of a report enables you to optimize the presentation of the report to maximize data analysis.

Example

You have many columns, in a list report but you want to compare the first and last columns. You hide all the columns in between and see the first and last columns side-by-side.

Steps

1. Select the row, column, picture, or report variable that you want to hide.
2. From the Format menu, click Hide.

More Info

Note

- Hiding any row in the detail lines of a list report hides all the detail rows.

Related Topics

- "Hide, Show, Group or Resize Parts of a Report" (p. 69)
- "Show Part of a Report" (p. 70)
- "Unhide Part of a Report" (p. 70)

Show Part of a Report

Description

Showing hidden parts of a report makes them temporarily visible, but if you unhide parts of a report, they are shown permanently.

Example

In a list report you have several hidden columns. You show the hidden columns so that you can compare the values in the hidden columns.

Step

- From the View menu, click Show Hidden.

  Any hidden parts of the report are now visible.

Related Topics

- "Hide Part of a Report" (p. 70)
- "Hide, Show, Group or Resize Parts of a Report" (p. 69)
- "Unhide Part of a Report" (p. 70)

Unhide Part of a Report

Description

Unhiding parts of a report makes them permanently visible.

Example

In a list report you have three hidden columns, but you want to compare the first column with one of the hidden columns. You unhide the hidden column.

Steps

1. From the View menu, click Show Hidden to show all hidden parts of a report.
2. Select the hidden row, column, picture, or report variable.
3. From the Format menu, click Show.

   The part of the report you selected is no longer hidden.

More Info

What if ...

- You want to see parts of the report that are hidden?

  If you do not want to permanently change them from being hidden, click the Show Hidden command (View menu).

Related Topics

- "Hide Part of a Report" (p. 70)
- "Hide, Show, Group or Resize Parts of a Report" (p. 69)
- "Show Part of a Report" (p. 70)

Group Parts of a Report

Description

When you group parts of a report, aligning and formatting is applied to the entire group, not just the individual parts of a report.

You can align a grouped section of a report. For example, if you left-align a grouped section of a report, the entire group moves to the left of the report. The left-alignment is maintained even if you change the report page layout from landscape to portrait or vice versa. If you select parts of a report and align them without grouping them first, they align with each other, for example, Ctrl+click two text frames and then click Align Left.

Apply a pattern or border to a group to emphasize important information in the report. You can maintain spacing between parts of a report by grouping them and moving the group as a single unit.

You can remove one or more objects from a group or ungroup the entire group at any time.

Note: Grouping parts of a report is not the same as grouping data.

Steps

1. Select the parts of the report you want to group.
2. From the Format menu, click Group Objects.

More Info

Note

- You cannot group two grouped sections together. However, you can add to a group by dropping a new object into the group form frame and you can remove from a group by dragging an object out of the group form frame.

Tip

- To quickly select several parts of a report, such as a picture and a comment, Ctrl+click each part of the report.

What if ...

- You want to ungroup one object in a group?

  Select that object and drag it outside the group form frame.

- You want to ungroup all objects in a group?

  Select the group form frame and, from the Format menu, click Ungroup.

Related Topics

- "Hide, Show, Group or Resize Parts of a Report" (p. 69)

Resize Part of a Report

Description

You can

- resize parts of a report using the mouse.
- snap a part of the report to match the size of its parent frame.
- vary the height of part of a report based on the data using the Dynamic height option. This option can only be used with text.
- set the exact width and height of a selected report part to meet your specific requirements.
- size part of a report to fit the data by using the Scan Data for Best Width and Scan Data for Best Height options.
- align the width of the header and footer in a list report to the width of the report columns.

Steps

1. Select the part of a report you want to resize.
2. From the Format menu, click Size.
3. In the box indicating height or width, do one of the following:
   - To match the size of the parent frame, click Snap to Parent.
   - To vary the height of text frames depending on their content, click Dynamic Height.
   - To set the exact height and width of part of a report, click Specify Height and Specify Width, and type the height and width you want.
   - To size part of a report to fit the data, click Scan Data for Best Height.
   - To align the header and footer to the width of the report column, click Snap to Columns.

   Note: The sizing options available depend on the type of object you select.
4. Click OK.

More Info

Note

- When you select a part of your report to resize, you will see a border with handles that you can drag to resize.

Related Topics

- "Hide, Show, Group or Resize Parts of a Report" (p. 69)

Stack Parts of a Report

Description

Parts of a report can be stacked on top of the other.

Example

You use your company logo as the background for an existing report. You insert the bitmap and size it to fill the page and then place it behind the existing report.

Steps

1. Click the part of the report you want to stack.
2. From the Format menu, click Stacking, and click one of the following.
   - Click Bring Forward to move on layer forward in the stack.
   - Click Send Back to move one layer back in the stack.

- Click Bring to Front to move directly to the front of the stack.
- Click Send to Back to move directly to the back of the stack.

Related Topics

- "Hide, Show, Group or Resize Parts of a Report" (p. 69)

Chapter 13: Format a Report

There are many things you can do to enhance the format of your reports.

You can

- assign data formats to numbers, characters, dates, times, date-times, and intervals. A data format applies pre-determined characteristics to the selected data items, that affect how they appear in your report
- customize data formats by editing the standard formats or by creating your own with the available format symbols.
- use conditional formats.
- change the font type, style, color, and size
- add colors, patterns, and borders to parts of a report
- resize part of a report
- apply a style to selected parts of a report
- stack text or graphics on top of each other to create special effects
- use the grid to position parts of a report

Each time you make changes to a report, Impromptu automatically retrieves the data you require from the database. To save time when formatting a report, you can turn automatic data retrieval off. For more information, see "Retrieve Data from the Database" (p. 37).

Related Topics

- "Add a Page Header or Footer" (p. 76)
- "Adjust Margins" (p. 77)
- "Align Parts of a Report" (p. 77)
- "Apply a Template to an Existing Report" (p. 75)
- "Format Data" (p. 81)
- "Insert Text, Pictures, and Other Report Variables" (p. 63)
- "Position Part of a Report Using Snap to Grid" (p. 78)

Apply a Template to an Existing Report

Description

A template contains placeholders and stores formatting information such as margin settings, page orientation, and font choices.

If the template you are applying contains placeholders, Impromptu tries to match each placeholder to a data item in your report. If a match is found, Impromptu applies the data definition from the placeholder to the data item.

When you apply a different template to a report, Impromptu automatically transfers all the formatting from the selected template to the report.

Example

There is a placeholder in the template with a currency format, and a data item in your report that is a number. They are both in the same position in the query (they are both the third item listed in the Query Data box in the Data tab of the Query dialog box). Impromptu applies the formatting from the placeholder to the data item. The data item in your report that is a number now appears in a currency format.

Steps

1. From the Report menu, click Apply Template.
2. Locate the template you want and click OK.

More Info

Note

- Impromptu does not apply any grouping, sorting, or filtering from the template to your report except when you apply the Grouped List template or the Grouped Crosstab template.

What if ...

- You apply a template to a report that contains sub-reports?

  The template is only applied to the main report.

Related Topics

- "Format a Report" (p. 75)
- "Use a Template to Quickly Create a Report" (p. 33)

Add a Page Header or Footer

Description

A page header appears at the top of every page, and a page footer appears at the bottom of every page. The page header and the page footer areas are separate parts of a report.

A page header or footer can contain

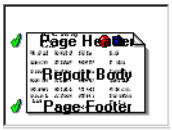
- text
- pictures
- report variables
- calculations that contain summary values for the detail lines in the list

Example

You add a page header to show a company logo and a page footer to provide page numbers on every page.

Steps

1. From the File menu, click Page Setup and click the Page Setup tab.
2. Do one of the following:
   - To insert a page header at the top of every page of the report, click Page Header.
   - To insert a page footer at the bottom of every page of the report, click Page Footer.

3. Click OK.

More Info

Note

- Although you can insert page headers and footers in Screen Layout view, you can only see them in Page Layout view. When you print a report from Screen Layout view, the page headers and footers will print.

Tips

- To add data to a page header or footer, drag and drop data from the report into the header or footer.
- To remove a page header or footer, clear the check mark beside the Page Header or Page Footer item in the Page Setup tab (Report Properties dialog box).

Related Topics

- "Format a Report" (p. 75)
- "Insert a Report Variable" (p. 67)

Adjust Margins

Description

Margins are the outer perimeters of your report. You can control how much space is on the top, bottom, left, and right of the report.

Example

You want to include white space on the report for writing notes. You set the left and right margins to 2 in. or 5 cm to provide space on either side of your report data.

Steps

1. From the File menu, click Page Setup.
2. Type values into the Margins boxes.
3. Click OK.

More Info

Tip

- To see the page margins, click Page Layout from the View menu.

Related Topics

- "Format a Report" (p. 75)

Align Parts of a Report

Steps

1. Select the parts of the report that you want to align.
2. From the Format menu, click Align.
3. In the box indicating vertical alignment, do one of the following.
   - Click Align Top Edge to align the selected report parts to the top edge and specify whether to align them to the top edge of the selection box or the top edge of the report.
   - Click Align Center to align the selected report parts to the center and specify whether to align them to the center of the selection box or the center of the report.
   - Click Align Bottom Edge to align the selected report parts to the bottom and specify whether to align them to the bottom edge of the selection box or the bottom edge of the report.
   - Click Evenly Space to space the selected report parts evenly and specify whether to align them to the selection box or to the report.

   This option is only available when you select more than one part of a report.
4. Click the down arrow next to the box indicating horizontal alignment and do one of the following.
   - Click Align Left Side to align the selected report parts to the left and specify whether to align them to the left edge of the selection box or the left edge of the report.

- Click Align Center to align the selected report parts to the center and specify whether to align them to the center of the selection box or the center of the report.
- Click Align Right Side to align the selected report parts to the right and specify whether to align them to the right edge of the selection box or the right edge of the report.
- Click Evenly Space to space the selected report parts evenly and specify whether to align them to the selection box or to the report.

This option is only available when you select more than one part of a report.

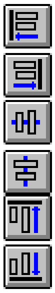
5. Click OK.

More Info

Note

- You cannot align parts of a report in different group footers. For example, you cannot align a part of the report in a Product Type group footer with a part of the report in the Product Line group footer. You can, however, align parts of a report in a list header or footer to details in the report.

Tip



- To quickly align selected report parts, click one of these buttons on the toolbar

  Align Left

  Align Right

  Align Center (Vertical)

  Align Center (Horizontal)

  Align Top

  Align Bottom

What if ...

- You do not want to align parts of a report?

  Click No Alignment in the box for the vertical or horizontal alignment. None appears in the box indicating that no vertical or horizontal alignment is applied.

  The None option automatically appears when the selected report parts have conflicting alignment options. For example, if you select text in a list report and a rectangle, the None option appears.

Related Topics

- "Format a Report" (p. 75)

Position Part of a Report Using Snap to Grid

Description

You can position parts of a report using a hidden grid. When Snap to Grid is enabled, you can move report parts in half-character jumps. This enables you to align report parts with precision. By default, Snap to Grid is enabled.

Steps

1. From the Tools menu, click Snap to Grid.

   Note: A check mark beside to the Snap to Grid command indicates that the option is selected.
2. Move a part of the report.

More Info

Tip

- To position a selected report part and maintain the current horizontal and vertical position, hold down the Shift key while positioning the selected report part. Impromptu moves the selected report part vertically or horizontally in a straight line.

What if ...

- You want to change the spacing between the grid?

  You can change the grid spacing by specifying the number of inches or centimeters between grid intervals. From the Tools menu, click Options, and click the General tab. Ensure that the Snap to Grid check box is selected. In the Grid Interval box, type the value for the spacing.

Related Topics

- "Format a Report" (p. 75)

Chapter 14: Format Data

Description

The database from which Impromptu retrieves data for your reports contains several types of data—numeric, character, date, time, date-time, and interval. This data can be formatted using standard formats or custom formats you create. A data format applies pre-determined characteristics to the selected data items that affect how they appear.

You can create new data formats by editing the standard formats or by creating your own formats using the available format symbols. A format symbol represents a value supplied by your database. For example, "MMM" is a format symbol that represents the month in a three-character form, such as "Jan".

A variety of format settings are established when you install Windows or when you change the country selection. For example, the currency format can default to $ or £ depending on your default settings.

Steps

1. Select the columns or values that you want to change.

   When you format a value, the format is applied to all the values in that column.
2. From the Format menu, click Data.
3. Select a pre-set data format or create a custom data format using the available format symbols. To format
   - Number data, see "Numeric Format Symbols" (p. 82).
   - Character data, see "Character Format Symbol" (p. 83).
   - Date data, see "Date Format Symbols" (p. 83).
   - Time data, see "Time Format Symbols" (p. 84).
   - Date-time data, see "Date-Time Format Symbols" (p. 85).
   - Interval data in days or dates, see "Interval Format Symbols" (p. 86).

   You can specify different formats for positive and negative numeric values, zero values, and missing values.
4. Click OK.

   If you specify an invalid format, Impromptu shows #FORMAT# for the selected data items.

More Info

Notes

- If you use characters in your format other than those documented as format symbols, they must be surrounded by quotation marks or preceded with the backward slash symbol (\).

Tips

- To quickly apply the currency format to numeric data, select a value or column, and then click the Currency button on the toolbar. Impromptu automatically applies the format to all values in the column in accordance with the default settings in the Data Format tab (Options dialog box, Tools menu).

  Currency button
- To quickly format columns or values, right-click the columns or values, and then click Format.

Related Topics

- "Justify Data" (p. 86)

- "Enhance Data Display" (p. 87)
- "Using the Currency Symbol List" (p. 87)

Numeric Format Symbols

Format Symbols	Description
General	Shows the numeric value in the General format.
Number	Shows the numeric value in the format set by the locale settings. For information about using the Number format, see (p. 90).
Currency	Shows the numeric value with the currency symbol. For information about using the Currency format, see (p. 90).
0	Shows the numeric value in the number of digits indicated in the format and, if necessary, adds zeros to the number to comply with the format. It rounds the number off if the data item has more significant digits to the right side of the decimal than the format specifies. For example, #.00 shows 8.9 as 8.90 and shows 8.912 as 8.91.
#	Shows the numeric value in the number of digits indicated in the format but constrains the number of digits shown on the right of the decimal to the number of #s in the format. For example, ##.### shows 12.345678 as 12.345 and shows 123.45 as 123.45.
?	Shows the numeric value in the number of digits indicated in the format but, if necessary, adds spaces on both sides of the decimal point so that decimal points align. For example, ?#.0? shows 1.23 (with a space before the 1) and 12.3 (with a space after the 3).
. (period)	Inserts a period.
, (comma)	Inserts a comma.
$	Inserts the currency symbol from your locale settings. For example, ## ###.##$ with "£" selected as the currency symbol shows as 12345.67 as 12 345.67£.
%	Shows the number as a percentage with a percent sign.
E-# E+# e-# e+#	Shows the number in scientific notation. A negative sign before the exponent indicates a number less than one. The number of digits in the exponent is not constrained by the number of #s. For example, 12,500,000,000 shows 1.25E10.
_ (underscore)	Skips the width of the next format character. Use this symbol to align positive numbers properly in numeric formats where negative values are indicated by parentheses. For example, the data format 0.00_) for positive numbers and (0.00) for negative numbers aligns both numbers on the decimal point as follows. (21753.00) 717.00
" "	Shows whatever is between the quotation marks.
' (apostrophe)	Shows the symbol as entered. When you return to the Format dialog box, you will see a backward slash to indicate that the apostrophe has significance as a format.

Format Symbols	Description
\	Shows the next character in the format. Use this symbol to treat a format symbol as a standard character. Enter two backward slashes to show a backward slash.

Character Format Symbol

Format symbol	Description
General	Shows the character value in the General format.
- (hyphen) / : space	Shows the symbol as entered.
'	Shows the symbol as entered. When you return to the data formatting dialog box, you will see a backward slash to indicate that the apostrophe has significance as a format.
*	Shows remaining characters in the string.
\	Shows the next character in the format. Use this symbol to treat a format symbol as a standard character. Enter two backward slashes to show a backward slash.
_ (underscore)	Skips the width of the next format character. Use this symbol to align positive numbers properly in numeric formats where negative values are indicated by parentheses.
A	Shows a single character, uppercase.
a	Shows a single character, lowercase.
@	Shows one character, as is.
@*	Shows the rest of the string, as is.
|	Skips this character.
" "	Shows whatever is between the quotation marks.

Date Format Symbols

Format symbol	Description
General	Shows the date value in the format set by the locale settings.
D	Shows the day of the week as one or two digits (1-31).
DD	Shows the day of the week as two digits (01-31).
DDD	Shows the day of the week as a three-letter abbreviation (Mon).
DDDD	Shows the full name of the day of the week (Monday).
M	Shows the month as one or two digits (1-12).
MM	Shows the month as two digits (01-12).

Format symbol	Description
MMM	Shows the month as a three-letter abbreviation (Jan).
MMMM	Shows the full name of the month (January).
YY	Shows the last two digits of the year (00-99).
YYYY	Shows all four digits of the year (1900-2100).
- (hyphen) / : space	Shows the symbol as entered.
'	Shows the symbol as entered. When you return to the Format dialog box, you will see a backward slash to indicate that the apostrophe has significance as a format.
\	Shows the next character in the format. Use this symbol to treat a format symbol as a standard character. Enter two backward slashes to show a backward slash.
" "	Shows whatever is between the quotation marks.

Time Format Symbols

Format symbol	Description
General	Shows the time value in the General format.
H	Shows the hour as one or two digits in 24-hour format (0-23). If the format includes the format symbols AM/PM, am/pm, A/P, or a/p, then H shows the hour as one or two digits in 12-hour format (1-12).
HH	Shows the hour as two digits in 24-hour format (00-23). If the format includes the format symbols AM/PM, am/pm, A/P, or a/p, then HH shows the hour as two digits in 12-hour format (01-12).
M	Shows the minutes as one or two digits (1-59).
MM	Shows the minutes as two digits (01-59).
S	Shows the seconds as one or two digits (1-59).
SS	Shows the seconds as two digits (01-59).
SSS	Shows the milliseconds (000-999).
AM/PM am/pm A/P a/p	Shows the time in 12-hour format, followed by AM (midnight to 11:59:59 AM) or PM (noon to 11:59:59 PM).
- (hyphen) / : space	Shows the symbol as entered.

Format symbol	Description
'	Shows the symbol as entered. When you return to the Format dialog box, you will see a backward slash to indicate that the apostrophe has significance as a format.
\	Shows the next character in the format. Use this symbol to treat a character that has significance as a format literally. Enter two backward slashes to show a backward slash.
" "	Shows whatever is between the quotation marks.

Date-Time Format Symbols

Format symbol	Description
General	Shows the date-time value in the format set by the locale settings.
D	Shows the day of the week as one or two digits (1-31).
DD	Shows the day of the week as two digits (01-31).
DDD	Shows the day of the week as a three-letter abbreviation (Mon).
DDDD	Shows the full name of the day of the week (Monday).
M	Shows the month as one or two digits (1-12).
MM	Shows the month as two digits (01-12).
MMM	Shows the month as a three-letter abbreviation (Jan).
MMMM	Shows the full name of the month (January).
YY	Shows the last two digits of the year (00-99).
YYYY	Shows all four digits of the year (1900-2100).
H	Shows the hour as one or two digits in 24-hour format (0-23). If the format includes the format symbols AM/PM, am/pm, A/P, or a/p, then H shows the hour as one or two digits in 12-hour format (1-12).
HH	Shows the hour as two digits in 24-hour format (00-23). If the format includes the format symbols AM/PM, am/pm, A/P, or a/p, then HH shows the hour as two digits in 12-hour format (01-12).
M	Shows the minutes as one or two digits (1-59).
MM	Shows the minutes as two digits (01-59).
S	Shows the seconds as one or two digits (1-59).
SS	Shows the seconds as two digits (01-59).
SSS	Shows the milliseconds (000-999).
AM/PM am/pm A/P a/p	Shows the time in 12-hour format, followed by AM (12:00AM to 11:59:59 AM), or PM (12:00 PM to 11:59:59 PM).

Format symbol	Description
- (hyphen) / : space	Shows the symbol as entered.
'	Shows the symbol as entered. When you return to the Format dialog box, you will see a backward slash to indicate that the apostrophe has significance as a format.
\	Shows the next character in the format. Use this symbol to treat a format symbol as a standard character. Enter two backward slashes to show a backward slash.
" "	Shows whatever is between the quotation marks.

Interval Format Symbols

Format symbol	Description
D	Shows the number of days.
H	Shows the hour as one or two digits in 24-hour format (0-23).
HH	Shows the hour as two digits in 24-hour format (00-23).
M	Shows the minutes as one or two digits (1-59).
MM	Shows the minutes as two digits (01-59).
S	Shows the seconds as one or two digits (1-59).
SS	Shows the seconds as two digits (01-59).
SSS	Shows the milliseconds (000-999).
:	Shows the symbol as entered.
.	Shows the symbol as entered.
space	Shows the symbol as entered.
" "	Shows whatever is between the quotation marks.

Justify Data

Description

You can enhance the appearance of your report by centering or aligning data items. By default, data items in numeric columns are right-aligned while all other data items are left-aligned.

You can also specify that text wraps.

Steps

1. Select one or more data items in your report.
2. From the Format menu, click Properties and click the Layout tab.
3. Justify the data items to the left, center, or right by selecting the appropriate button in the Justification box.
4. To set how text wraps, do one of the following:

   - To show text on a single line, click the Single Line option button. Text exceeding the width of the frame is not visible.
   - To show text on multiple lines, click the Multi-Line option button. Text exceeding the width of the frame is not visible.
   - To show text on multiple lines and wrap text inside the frame, click the Multi-Line with Word Wrap option button. Text wraps if it exceeds the width of the frame.
5. Click OK.

More Info

Note

- All values in a selected column are justified. For example, if you select a single value in a column and specify right justification, all the values in the column are right justified.

Related Topics

- "Format Data" (p. 81)
- "Enhance Data Display" (p. 87)

Enhance Data Display

Description

You can enhance the appearance of your report by changing the font, font size, style and color of data in your report.

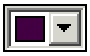
Steps

1. Select one or more data items in your report.
2. From the Format menu, click Font.
   The Format dialog box appears.
3. In the Font box, click a font.
4. In the Font Style box, click a font style.
5. In the Size box, click a font size.
6. To set text color, click Customize.
7. In the Color dialog box, click a color from the basic colors or define a custom color, then click OK.
8. In the Format dialog box, click OK.

More Info

Tip

- To quickly add color to data in a report, click the Color tool and set the color using the Color dialog box.



Color Tool

Related Topics

- "Format Data" (p. 81)
- "Justify Data" (p. 86)

Using the Currency Symbol List

You are provided a list of currency symbols in the Currency Symbol list to format numeric data. Currency formatting can be set independently of number formatting on a column-by-column basis. You can select an explicit currency symbol that persists with the data, or select the Default option. Default uses the currency setting defined by your locale.

You can change what currencies are listed in the Currency Symbol list. For more information see "Maintain Currency Symbols" (p. 88).

Steps to Use a Currency Symbol that Persists with the Data

1. With a report open, click a column with numeric values.
2. From the Format menu, click Data.
3. In the Positive box, click Currency.

   The Currency Symbol list is enabled.
4. In the Currency Symbol list, select a currency symbol, such as the euro.

   The data in the report shows the number values in the default number format with the currency symbol. This symbol persists with the data values when the report is distributed.

Steps to Use a Currency Symbol that Defaults to the User's Locale

1. With a report open, click a column with numeric values.
2. From the Format menu, click Data.
3. In the Positive box, click Currency.

   The Currency Symbol list is enabled.
4. In the Currency Symbol list, select Default.

   Default uses the currency setting defined by your locale. For more information about modifying locale settings, see the Configuration Manager *User Guide*.

Related Topics

- "Format Data" (p. 81)

Maintain Currency Symbols

Description

You are provided a list of currency symbols that you can apply to numeric data. You can edit the Currency Symbol list by adding, deleting, and re-ordering currency symbols.

To make changes to the Currency Symbol list, you must edit the XML file i18n_res.xml. The file is located in the directory *installation_location*\bin.

The currency symbols that appear in the Currency Symbol list exist as elements in the i18n_res.xml file. Each currency element begins with the opening tag <currency> and ends with the closing tag </currency>. Nested within the currency element is a name element. The name element creates text that displays to the right of the currency symbol. It has the opening tag <name> and the closing tab </name>. Both the currency and name elements have attributes. To add, delete, or re-order symbols in the Currency Symbol list, you must edit these elements and attributes.

Here is a sample of a currency element.

```
<currency code="CAD" symbol="$" ID="CAD">
   <name lang="en">Canadian Dollar</name>
</currency>
```

The list of currencies that shows in Impromptu is created as follows:

```
<currency_symbol> - <currency_description>
```

For example, $ - US Dollar

The currency element attributes are:

Attribute	Description
Code	Standard ISO three letter currency code. It is recommended that you do not edit this value.

Attribute	Description
Symbol	Symbol displayed at the start of the list (on the left-hand side). This symbol can have multiple values, for example, $ and US$. However, each symbol value must have a unique identifier such as "USD" for $ and "USD1" for US$.
ID	Internal identifier. The ID value must be unique in the file.

The name element has a single attribute.

Attribute	Description

Lang	Identifies the two letter ISO code for the language of the text. You can define multiple names for a single currency symbol. For example,
	`<name lang="en"> South Korea, won</name>`
	`<name lang="de"> Korea (Süd-Korea), Won</name>`
	`<name lang="fr"> Corée du Sud, won</name>`

Steps to Add a Currency Symbol

1. Open the i18n_res.xml file in Notepad.
2. Add a currency element using the following structure:
   ```
   <currency code="currency_code" symbol="currency_symbol" ID="currency_id">
         <name lang="language_code">Currency_description</name>
   </currency>
   ```
3. Define the currency element by adding values to the currency and name elements:
   - in the name-value pairs, code="currency_code", symbol="currency_symbol", and ID="currency_id", replace placeholder text in quotation marks with specific values
   - add a currency description

   For example,
   ```
   <currency code="SGD" symbol="S$" ID="SGD">
         <name lang="en">Singapore Dollar</name>
   </currency>
   ```
   Most currencies are listed in the file but commented out. To display them, remove the "<!--" on the left-hand side.
4. From the File menu, click Save.

   To view the changes to the Currency Symbol list, restart the product.

Steps to Remove a Currency Symbol

1. Open the i18n_res.xml file in Notepad.
2. To delete a currency element, delete the currency opening tag <currency> and the closing currency tab </currency> tag and all the content framed by these tags.

   Note: To suppress the display of a currency element, without removing the entry from the file, insert the comment tag <!-- before the currency opening tag, and the comment tag --> after the currency closing tag. For example,
   ```
   <!-- <currency code="ALL" symbol="Lek" ID="ALL"> <name lang="en">Lek</name>
   -->
   ```
3. From the File menu, click Save.

   To view the changes to the Currency Symbol list, restart the product.

Steps to Change the Order of Currency Symbols

1. Open the i18n_res.xml file in Notepad.
2. Select the currency element to move.

   Be sure to select the opening and closing currency tags <currency> and </currency>.
3. Cut the currency element and paste it in the new location in the currency symbol list.
4. From the File menu, click Save.

To view the changes to the Currency Symbol list, restart the product.

Notes

- XML syntax is case-sensitive.
- the i18n_res.xml file is encoded in UTF-8. Ensure that you use an appropriate editor.

Tip

- To avoid the loss of existing information, backup the currency symbol file before modifying the XML tags.

Related Topics

- "Using the Currency Symbol List" (p. 87)
- "Format Data" (p. 81)
- "Justify Data" (p. 86)
- "Enhance Data Display" (p. 87)

Data Formats and Locale Settings

Data formats depend on the locale configuration settings for your Cognos Series 7 product. By default, Cognos Series 7 server products and Cognos Impromptu use a data format configuration file named cerlocale.xml. Cognos Architect, Cognos Visualizer, Cognos PowerPlay for Windows, and Cognos Transformer use Windows Regional Settings for locale settings and data format information. However, these products can also be configured to use the data format configuration file.

For information about managing data formats, copying data format information, or editing the data format configuration file, see the Configuration Manager *User Guide*, or contact your administrator.

Number and Currency Data Type Formatting

When you format numeric data, you can apply a custom format explicitly, or you can choose to format data with the Number or Currency options. If you use Number or Currency, the data format is set to the values retrieved from the cerlocale.xml file. For example, if you specify Number, the data items are formatted using the elements such as SDecimal, SThousand, and so on. If you use Currency, the data items are formatted using the elements such as SCurrency, SMonCurrencySep, SMonThousandSep, and so on. If you want, you can edit the cerlocale.xml file and change the default data formats.

For information about managing data formats, copying data format information, or editing the data format configuration file, see the Configuration Manager *User Guide*, or contact your administrator. For information about the impact of using the cerlocale.xml file with existing reports, see "Data Formats and Locale Settings" (p. 90).

When Number and Currency are used, some rules apply.

- If the data type is float or double, the number of decimal places will be set to the value of IDigits (for number format) or ICurrDigits (for currency format) set in your cerlocale.xml file.
- If the data type is integer, small integer, packed decimal, or quad, the number of decimal places will be set to the column scale value set during database creation.
- If the scale is less than 0, the number of decimal places is 0.
- The maximum number of decimal places is 8. If the scale is greater than 8, the value is changed to 8.
- Number format is not rendered in scientific notation.

Tip: To find the data type and scale of a number, in Impromptu Administrator version, from the **Report** menu, click **Query**, and then in the **Profile** tab, click **Query columns**.

Chapter 15: Add a Border Around Part of a Report

Description

You can add borders around part of a report to emphasize it, to create structure, or to improve the overall report appearance.

Example

You borders to part of a report and you specify colors for your borders.

Steps

1. Select the part of a report you want to put a border around.
2. From the Format menu, click Borders.
3. From the Style box, select the type of line.
4. Select the border lines for your border.
5. To add color to the border, click Customize.
6. In the Color dialog box, select the border color and click OK.

   The border color displays in the Color box.
7. Click OK.

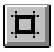
More Info

Note

- For information about adding borders to list reports, see "Hide or Show Grid Lines" (p. 95).

Tips

- To quickly add a single-line border around a selected part of a report, click the Borders button on the toolbar.

  Borders button
- To remove a border from a selected part of a report, click the Borders button on the toolbar.
- To quickly select several parts of a report, such as a picture and a comment, Ctrl+click each part of the report.

Related Topics

- "Add Color or a Pattern to Part of a Report" (p. 91)
- "Change the Font" (p. 92)
- "Apply a Style to Part of a Report" (p. 93)

Add Color or a Pattern to Part of a Report

Description

You can enhance the appearance of a report by changing the background color of part of the report.

You can also add patterns to selected parts of a report to emphasize important data.

By mixing the foreground and background colors, you can create a range of patterns to use in your report.

Example

THE GREAT OUTDOORS

Customer List

Customer Name	Customer Contact	City
Backwoods Equipment Pty	Jake Jenkins	Sydney
GO Outlet Sydney	Jake Cartel	Syndey
Vacation Central 1	Dave Smythe	Melbourne
OutBack Pty 1	Alice Walter	Sydney
OutBack Pty 2	Lawrence Jenkins	Brisbane
OutBack Pty 3	John Sinden	Perth
OutBack Pty 4	Walter Rice	Sydney
Jackos Enviro Shop	Donald Ward	Brisbane
Vacation Central 2	Pierre Smears	Antwerpen
Wilderness Wonderment Ltd	Martine Choutier	Brussels
Rock Steady 4	Francine Roulier	Brussels
Wally Mart 3	Claude Lafleur	Brussels

To make one column in your report stand out from the rest, you give it a pattern.

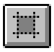
Steps

1. Select the part of the report that you want to change.
2. From the Format menu, click Patterns.
3. From the Pattern box, select a pattern.
4. To select a foreground color, under Foreground:, click Customize.
5. In the Color Dialog Box, select a color and click OK.
6. To select a background color, under Background:, click Customize.
7. In the Color dialog box, select a color and click OK.

More Info

Tips

- To quickly change the color of a selected part of a report, click the Pattern button on the toolbar.

  Pattern button

  Impromptu adds a 25% gray shading to the selected part of a report.
- To quickly remove patterns from selected parts of a report, click the Pattern button on the toolbar.
- To remove patterns from selected parts of a report, use the Patterns command (Format menu), and then click Transparent in the Patterns box.
- To print your report in black and white, use patterns instead of colors.

Related Topics

- "Add a Border Around Part of a Report" (p. 91)
- "Apply a Style to Part of a Report" (p. 93)
- For information about conditional formatting, see *Mastering Impromptu Reports*.

Change the Font

Description

When you create a new report, Impromptu uses default font attributes for text. You can override these defaults and change the type, size, style, and color of the font.

Example

You show selected data items in boldface and increase the font size of selected text in a header.

Steps

1. Select the text you want to format.
2. Click the appropriate formatting button on the toolbar to make the change.
   You can choose a font type, size, color, and any or all of three styles: bold, italic, and underline.

More Info

Notes

- If you are creating reports for others, use standard fonts available to all users.
- Impromptu's minimum font size is 6. If you type in a lesser value and click OK, the text size remains unchanged.

Tips

- To take advantage of additional font attributes or to make several changes at one time, use the Font command (Format menu).
- To change the default font for all new reports, use the Object Format tab (Options dialog box, Tools menu).

Related Topics

- "Apply a Style to Part of a Report" (p. 93)

Apply a Style to Part of a Report

Description

You can apply a style to a selected part of a report. Use the convenience of styles to apply several pre-defined formats to your report in one step.

Example

You apply a style called "Sales Up" to summary data that represents an increase in sales for a given month. This style applies a specific font, font size, and color to the selected report part.

Steps

1. Select the part of the report to which you want to apply a style.
2. From the Format menu, click Styles.
3. From the Style box, select a style.
   The Style box contains several styles that come with Impromptu and any styles you have created.
4. Click Apply and then click Close.

More Info

Note

- You can apply more than one style to part of a report.

What if ...

- You change your mind after applying a style?
  From the Style box, select None.

Related Topics

- "Add a Border Around Part of a Report" (p. 91)
- "Add Color or a Pattern to Part of a Report" (p. 91)
- "Change the Font" (p. 92)

Chapter 16: Format a List or Crosstab Report

There are many ways to format a list report:

- "Hide or Show Grid Lines" (p. 95)
- "Select Parts of a List Report" (p. 96)
- "Move a Column" (p. 97)
- "Change a Column Title" (p. 98)
- "Change the Width of a Column" (p. 98)
- "Change the Height of a Row" (p. 99)
- "Add a Group or List Header or Footer" (p. 100)
- "Change the Height or Width of a List Header or Footer" (p. 101)
- "Keep Details and Group Headers (or Footers) Together" (p. 101)
- "Insert a Page Break in a List Report" (p. 102)

There are several ways to format a crosstab report:

- "Select and Format Parts of a Nested Crosstab Report" (p. 102)
- "Set the Default Format for Crosstab Columns" (p. 104)

Hide or Show Grid Lines

Description

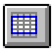
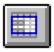
You can enhance the appearance of a list report by adding grid lines. Grid lines visually separate different areas in a report.

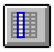
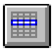
You can show or hide grid lines

- around the outside edge of the detail area to show or hide the detail boundaries
- around the individual columns to show or hide the column boundaries
- around the individual rows to set the detail lines apart clearly from any grouped columns
- above and below group data items to show where group data values change
- in any combination of the preceding four grid line settings

Steps

1. Select a cell, row, or column in the list.
2. From the Edit menu, click Select Parent.
3. Right-click the list, and select Format.
4. Click the Grid tab and do one of the following:

Click ...	To add or remove ...
 Outline	An outline grid from the selected list frame.
 Group	The border above and below each group.

Click ...	To add or remove ...
 Columns	Column grid lines. Impromptu adds a border around each column except the left-most and right-most columns. To add an outside border around the left-most and right-most columns, add an outline border in addition to the column border.
 Rows	Row grid lines.

5. If you want to change the line style for the grid, select a new line style from the Style box.
6. If you want to change the line color for the grid, click Customize.
7. In the Color dialog box, select a new color, and click OK.
8. In the Format dialog box, click OK.

Related Topics

- "Format a List or Crosstab Report" (p. 95)

Select Parts of a List Report

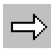
Description

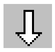
You can select a value, row, column, or entire list to perform actions such as

- changing format or properties
- applying a style
- adjusting size or position of items
- inserting a new data item
- copying items to the Clipboard
- moving items by dragging them to a new location
- sorting
- adding a summary operation

Step

- Do one of the following:

To select ...	Do the following:
A single value	Select the value that you want within the list. 
A row	Position the pointer over the left edge of the row that you want to select and click the mouse button.Your pointer changes to the following:  Select Row pointer

To select ...	Do the following:
A column	Position the pointer over the top edge of the column that you want to select and click the mouse button. Your pointer changes to the following:  Select Column pointer
An entire list	Click the mouse to the right of the right-most column.
Headers and footers	Click any part of the header or footer that is empty.

More Info

Tips

- To select a range of adjacent columns, select the first column you want in the range by positioning the pointer over the selected column title header. The pointer changes to a down arrow.

  Click to select the first column. Shift+click to select the last column you want in the range. Impromptu selects all the columns in between the two columns you selected.
- To select non-adjacent columns, select the first column by positioning and clicking the pointer over the column title header. Ctrl+click each additional column you want to select.

Related Topics

- "Change the Height of a Row" (p. 99)
- "Change the Width of a Column" (p. 98)
- "Format a List or Crosstab Report" (p. 95)
- "Move a Column" (p. 97)

Move a Column

Steps

1. Position and click the pointer over the selected column title header.

   Your pointer changes to the following:

   
2. Drag the selection to the right or left.

   As you drag the column, Impromptu uses highlighting to indicate the column's new position. If two vertical lines appear between adjacent columns, then the column is inserted between the adjacent columns. If two vertical lines appear on the outer border of the first column, the column is inserted to the left of the first column. If two vertical lines appear on the outer border of the last column, the column is inserted to the right of the last column.
3. Release the mouse button when the column is in the correct position.

More Info

Notes

- You can also move a column by selecting a single data value in the column that you want to move and dragging the selection to the right or left.
- If you move a column to the top of the list, you create a crosstab.

What if ...

- The pointer changes to the following when you move it over the column headers.

Column pointer
You will create a crosstab report if you drop columns in the column headers.

Related Topics

- "Change a Column Title" (p. 98)
- "Change the Width of a Column" (p. 98)
- "Format a List or Crosstab Report" (p. 95)
- "Select Parts of a List Report" (p. 96)

Change a Column Title

Description

You can change a column title so that it is more descriptive and meaningful.

Steps

1. Double-click the column title you want to change.
2. Change the text in the title.
3. When you finish editing the text, click anywhere outside the column title.

Related Topics

- "Change the Width of a Column" (p. 98)
- "Format a List or Crosstab Report" (p. 95)
- "Move a Column" (p. 97)
- "Select Parts of a List Report" (p. 96)

Change the Width of a Column

Description

Impromptu sets the column width to the best fit based on the data in the column.

You can also change the width of columns in a list to meet specific reporting requirements by

- using the mouse to drag-size the width of a column
- changing the column width using precise specifications

Example

To fit a list exactly within the boundaries of a specific paper size, you set the size of each column in the list to a specific value, such as 1 inch and 2.5 cm.

Steps to Change the Width of a Column

1. Select any cell in the column that you want to resize.
2. Position the pointer over one of the handles that controls the horizontal size of the cell.
3. While holding down the mouse button, drag the handle until the cell is the size you want.
4. Release the mouse button.

Steps to Change Column Width Using Precise Specifications

1. Select any cell in the column that you want to resize.
2. From the Format menu, click Size.
3. In the box indicating the width, do one of the following.
   - To show the Width Measurement box, click Specify Width.

     You can enter a specific value for the column width. The unit of measurement depends on your current settings.

    - To determine the best fit for the column based on a specified number of rows, click Scan Data for Best Width. In the Rows box, type the number of rows you want Impromptu to scan.
4. Click OK.

More Info

Note

- When you resize a cell to show multiple lines of text, the text in the cell does not wrap unless you set its properties appropriately. For information about setting properties, see "Justify Data" (p. 86).

Related Topics

- "Change a Column Title" (p. 98)
- "Format a List or Crosstab Report" (p. 95)
- "Move a Column" (p. 97)
- "Select Parts of a List Report" (p. 96)

Change the Height of a Row

Description

By default, Impromptu sets the row height to the height of the largest text string, picture, or report variable in the detail lines. When you change the cell font, Impromptu automatically adjusts the row height.

You can change the height of a row by

- sizing it with your mouse
- using precise specifications

You cannot change the height of a single row in a list. When you change the height of one row, all rows in the report are changed to the same height.

Example

To fit a list exactly within the boundaries of a specific paper size, you set the height of each row in the list to a specific value such as 1.25 cm or 0.5 inch.

Steps to Change the Height of a Row

1. Select the largest vertical text string, picture, or report variable from the row.
2. Position the pointer over one of the handles that control the vertical size of the row.
3. While holding down the mouse button, drag the handle vertically until the text string, picture, or report variable is the height you want.
4. Release the mouse button.

Steps to Change the Height of Rows Using Precise Specifications

1. Select the largest vertical text string, picture, or report variable from the detail lines of the list.
2. From the Format menu, click Size.
3. In the box indicating the height, do one of the following.
    - To show the Height Measurement box, select Specify Height.

      You can enter a specific value for the row height. The unit of measurement depends on your current settings.
    - To determine the best fit for the row based on a specified number of rows, click Scan Data for Best Height. In the Rows box, type the number of rows you want Impromptu to scan.
    - To set the height of each row based on the contents of the cell you selected in step 1, select Dynamic.
4. Click OK.

More Info

Note

- When you resize a cell to show multiple lines of text, the text in the cell does not wrap unless you set its properties appropriately. For information about setting the text properties, see "Justify Data" (p. 86).

Related Topics

- "Change the Width of a Column" (p. 98)
- "Format a List or Crosstab Report" (p. 95)
- "Select Parts of a List Report" (p. 96)

Add a Group or List Header or Footer

Description

You can enhance the appearance of a list as well as highlight grouped data by adding headers and footers to a list.

You can add or remove the following headers or footers at any time:

- List header and footer. They appear at the top and bottom of a list, and have a default height of one row (about 1 cm or .39 inches). You can change this height.
- Group header and footer (if you have grouped items). You can add a group header and group footer for each distinct group within the list. You can also insert calculations that show summary values such as totals, averages, or maximums in the group header or footer.

Example

You add a group header to your report to show the number of sales made by each sales representative in your organization. To clarify the report data, you also add a list header to your report and insert a title and the date.

Steps to Add a Group Header or Footer

1. Select one or more data items for which you want to create a group header or group footer.
2. On the toolbar, click the Header or Footer button.

   Header button

   Footer button

   If the selected data items are not grouped, Impromptu groups them, sorts them and adds a group header or footer for each. In addition, Impromptu automatically inserts the data items that you selected in step 1 into the group headers (but not into the group footers).

   Note: Impromptu does not cancel any groups that have already been set. The new group items are added to any existing group items.

Steps to Add a List Header or Footer

1. Select a cell in the list to which you want to add a list header or footer.
2. From the Edit menu, click Select Parent.
3. From the Format menu, click Properties and click the Layout tab.
4. Click List Header or List Footer check box to add it to the list.
5. Click OK.

More Info

Tip

- To delete a header or footer, select it and press the Delete key.

What if...

- You want to add a title to the list header?

From the Insert menu, click Text Frame. While holding down the mouse button, drag the mouse diagonally to size the area within the list header where your text will appear and release the mouse button.

Related Topics

- "Change the Height or Width of a List Header or Footer" (p. 101)
- "Format a List or Crosstab Report" (p. 95)
- "Keep Details and Group Headers (or Footers) Together" (p. 101)

Change the Height or Width of a List Header or Footer

Description

The default height of list headers and footers is two row heights (about 3/4 inches or 2 cm). The default width of the list headers and footers corresponds to the width of the list columns. You can change both the height and the width of a list header or footer to accommodate another text string, value, picture, or report variable.

Example

You change the height and width of the list header to add your company logo.

Steps

1. Select the list header or footer whose height you want to change.
2. Position the pointer over one of the handles until it changes to a two-headed arrow.
3. While holding down the mouse button, drag the handle until the header or footer is the size you want and release the mouse button.

More Info

Tip

- To align the header and footer in a list report to the width of the report columns, select Snap to Columns in the Size tab (Properties dialog box, Format menu).

Related Topics

- "Add a Group or List Header or Footer" (p. 100)
- "Format a List or Crosstab Report" (p. 95)
- "Keep Details and Group Headers (or Footers) Together" (p. 101)

Keep Details and Group Headers (or Footers) Together

Description

For any list report that appears in Page Layout view, you can increase report readability by preventing a group header or footer from appearing on a page by itself.

Use the Keep Details and Headers Together button to specify that no group header should appear at the bottom of a page by itself. Use the Keep Details and Footers Together button to specify that no group footer should appear at the top of page without at least one row of data above it.

Steps

1. Click a cell in the list report.
2. From the Edit menu, click Select Parent.
3. From the Format menu, click Properties and click the Layout tab.
4. To keep details with the group headers, click the Keep Details and Headers Together button.

   Otherwise, to keep details with the group footers, click the Keep Details and Footers Together button.
5. Click OK.

Related Topics

- "Add a Group or List Header or Footer" (p. 100)
- "Change the Height or Width of a List Header or Footer" (p. 101)
- "Format a List or Crosstab Report" (p. 95)

Insert a Page Break in a List Report

Description

You can insert a page break in your list report before or after a group or groups of data. You can also reset the page number to 1 for each group or after several groups of data. If the report has only a few rows of information on each page, you can remove the page breaks before you print to save paper.

Example

You have a long report based on sales in different cities. You start a new page each time your report shows information for a new city, and you start each city with the number 1.

Steps

1. Click a cell in the list report.
2. From the Edit menu, click Select Parent.
3. From the Format menu, click Properties and click the Layout tab.
4. To set a page break before or after a grouped data item, click the Page Break Before or Page Break After buttons that appear beside the group item.
5. To reset page numbers for one or more groups, click the group you want to reset page numbering for from the Reset the Page Number On box.

   There is nothing to select from this list if there are no groups in the report.
6. Click OK.

More Info

What if ...

- You want to remove page breaks before you print the report?

  In the Layout tab (List Properties dialog box), clear the Page Break Before or Page Break After buttons.

Related Topics

- "Format a List or Crosstab Report" (p. 95)

Select and Format Parts of a Nested Crosstab Report

Description

You can select a value, row, column, or you can select all the columns or column headings at a particular nesting level to perform actions such as

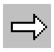
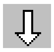
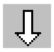
- changing format or properties
- applying a style
- adjusting size or position of items
- copying items to the Clipboard
- moving items by dragging to a new location
- sorting
- adding a summary operation

Example

You select the Sales Amount column for every sales channel in order to apply formatting.

Step

- Do one of the following:

To select ...	Do the following:
A single value	Select the value that you want within the crosstab. 
A row	Position the pointer over the left edge of the row that you want to select and click the mouse button. Your pointer changes to the following: 
A column	Position the pointer over the top edge of the column that you want to select and click the mouse button. Your pointer changes to the following:  Select Column pointer
All the column titles at a specific nesting level	Click the selection pointer twice in the top half of the column title.
All the columns at a specific nesting level	Position your pointer over a column at the nesting level you want to select and click the mouse button. Your pointer changes to the following:  Select Column pointer Click the mouse button a second time to select all the columns.
An entire crosstab	Click the point at which the horizontal and vertical scroll bars intersect in the lower-right corner of the crosstab.
Headers and footers	Click any part of the header or footer that is empty.

More Info

Notes

- You cannot edit the generated column titles in a crosstab report.
- When you apply formatting to all the column titles or all the columns at a particular nesting level, you set the default for all formatting at that nesting level. If new columns are added, Impromptu applies the default formatting.

Tip

- To format a nested crosstab, select the parts of the crosstab you want to format and apply formatting (Format menu). For information about formatting reports, see "Format a Report" (p. 75).

Related Topics

- "Create a Crosstab Sub-Report" (p. 36)
- "Set the Default Format for Crosstab Columns" (p. 104)
- "Use the Report Wizard to Quickly Create a Crosstab Report" (p. 32)

Set the Default Format for Crosstab Columns

Description

The number of columns in a crosstab report can change when you retrieve the data, apply a new filter, or change prompt values. Therefore, a crosstab report can have multiple columns. You can specify whether you want to change the default column formatting or the formatting for only one column.

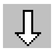
If you don't set a default column format, then the report uses the formats set in the Data Format tab of the Options dialog box.

You can use conditional formatting to format crosstab rows. Any conditional formatting set on a row supersedes the default column formatting for the columns cells in that row.

Steps

1. Select the column item you want to set the default formatting for.
    - To select a column title, click the bottom half of the title.
    - To select a column, click the top half of the column title.

      Your pointer changes to the following:

      Select Column pointer
    - To select a column total, click the total.
2. Set the default formatting for that column item (at that particular level).

   Column titles and totals can have many levels in a crosstab report.

Note

- If you select a single column title, cell, or total and change the format, that change only applies to that column item and only for as long as that column item exists in the report.

Related Topics

- "Create a Crosstab Sub-Report" (p. 36)
- "Filter Using Crosstab Titles" (p. 53)
- "Select and Format Parts of a Nested Crosstab Report" (p. 102)
- "Use the Report Wizard to Quickly Create a Crosstab Report" (p. 32)

Chapter 17: Create and Customize a Chart

In Impromptu, you can add charts to reports to show data graphically. You can choose from several different chart types. After you add a chart, you can change the chart type or customize the chart to improve readability and presentation. In particular, you can add chart titles, use grid lines and include a legend. You can also add labels for the data in a chart, and specify the format for the labels, such as style, font type, and size. For certain chart types, you can add a trendline.

For a list of the controls related to chart formatting, see (p. 165).

For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159).

Choosing a Chart Type

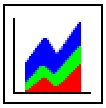
Description

A chart is a visual representation of data that you can use to quickly and easily evaluate information.

To choose a chart type, consider what you want the chart to illustrate. Different chart types and configurations emphasize different things.

Purpose	Chart type
Show contributions of parts to a whole	pie
Compare variables	bar
Compare trends in data over time	area
Highlight trends	radar
Compare trends and relationships between data	correlation
Create a graphical view of a project schedule	Gantt
Compare the difference between values such as stock prices	HLCO (high low close open) HLO (high low open)
Identify a pattern	scatter bubble

Area Charts



Area charts show trends in data over time by emphasizing the total quantity of several data items under the curve.

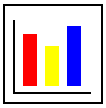
If data is ungrouped, the chart shows the group summaries for the first data item.

If data is grouped, each data item shows as a data group on the primary axis.

Area charts can have depth added, or have a three-dimensional layout.

Area charts plot data on the primary axis.

Bar Charts



Bar charts highlight changes over time and compare totals and individual values. A bar chart can reveal trends and patterns.

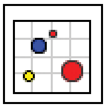
If data is ungrouped, each bar represents a summarized data item or a summarized row of values for a data item.

If data is grouped, each bar represents a group.

Bar charts can have depth added, or have a three-dimensional layout.

Bar charts plot data on the primary axis.

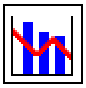
Bubble Charts



Bubble charts are line charts in which the data points are represented typically by bubbles. The advantage of using a bubble chart instead of a line chart is that the size of the marker provides quantitative information. Bubble markers can be changed to other formats such as stars.

Bubble charts plot data on the primary axis, secondary axis, and measure line. The measure data value is represented by the size of the bubble.

Correlation Charts

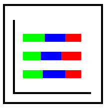


Correlation charts are bar charts overlaid with a line chart that allows you to show two different measures with a shared x-axis and two y-axes. The left and right y-axes can each have a different scale, enabling you to visually correlate dissimilar measures. For example, you can show products on the shared x-axis, with order income on the right-hand y-axis and order revenue on the left-hand y-axis, and visually compare the relationship between order income and order revenue for each product.

For information about how to create a correlation chart, see (p. 118).

For information about how to format a correlation chart, see (p. 118).

Gantt Charts

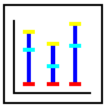


Gantt charts provide a graphical view of a project schedule. Gantt charts are horizontal.

To create a Gantt chart, you must group your data, and the second data item must be greater than the first data item.

Gantt charts plot data on the primary axis and the secondary axis.

HighLowCloseOpen (HLCO)

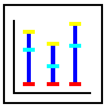


HighLowCloseOpen (HLCO) charts highlight changes for a specific time period to compare the difference between pairs of values.

HighLowCloseOpen charts plot data on the primary axis, secondary axis and measures line.

You can also use the HighLowCloseOpen chart type to create a HighLow chart and a HighLowClose chart. To create a HighLow chart, you do not specify a measure value. To create a HighLowClose chart, specify one measure.

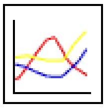
HighLowOpen (HLO)



HighLowOpen (HLO) charts track financial data such as the daily high, low and open price of a stock. It is a variation of the HighLowCloseOpen chart.

HighLowOpen charts plot data on the primary axis, secondary axis and measures line. The measure line plots only one measure.

Line Charts



Line charts plot data at equidistant points connected by lines to illustrate trends. Line charts are commonly used to show trends over time. Because the markers in a line chart can be formatted to take a up very little space, line charts are useful when you want to plot charts that have many data values.

If data is ungrouped, the chart shows a single line containing points for each data item.

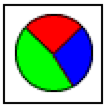
If data is grouped, the chart shows multiple lines for each data item. The primary axis shows the data groups.

Line charts plot data on the primary axis.

Line charts can have depth added, or have a three-dimensional layout. Line charts with depth are known as tape charts.

A log chart is a line chart that uses a logarithmic scale.

Pie Charts



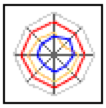
Pie charts show the relationship of parts to the whole. Data is represented as pie-shaped segments in a circle. Pie charts can have depth added.

If data is not grouped, each segment represents a data item.

If data is grouped, each segment represents a group summary.

Pie charts plot data on the primary axis.

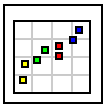
Radar Charts



Radar charts are used primarily as a comparative tool. Multiple data values are plotted on a circle and joined by connecting lines to create a radial figure. You can use either the area created by the connecting lines or the actual values on the chart to do a comparative analysis.

Radar charts plot data on the primary axis.

Scatter Charts



Scatter charts highlight the correlations between large sets of data or several changing data items. It is commonly used to analyze data when there is no obvious correlation between two pieces of data, such as revenue versus inventory counts. It can be used to identify a pattern by illustrating the relationship between independent variables.

Scatter charts plot data on the primary axis and the secondary axis.

Create a Chart

Description

To create a chart, you pick the data that you want to appear in the chart. Depending on the chart type you select, you can plot one or more data values. Data values are plotted for the primary axis, secondary axis, and for measures.

For more information about the chart types available and the data requirements for each, see "Choosing a Chart Type" (p. 105).

You can manipulate the view of the data by

- pivoting the data on the primary axis
- changing the data mode and viewing the date either by row or column

Before you create a chart, you must define the report query. For more information, see the following entry in the online help index: reports, creating.

Steps

1. With a report open, from the **Insert** menu, click **Chart Frame**.
2. Place the pointer where you want to locate the upper-left corner of the frame and drag the mouse diagonally until the frame is the size you want.

   The **Chart Properties** dialog appears.
3. In the **Chart type** box, click the chart type.

   The chart type sets whether you can plot one or more data values.
4. On the **Data** tab, in the **Query data** box, select the data items for the query. Use the arrow to move data items from the **Query data** box to the **Primary Axis**, **Secondary Axis**, and **Measure**(s) boxes, as required.

   Only numeric data items appear in the **Query data** box.

   Tip: To remove a data item, click the data item located in the **Primary Axis**, **Secondary Axis**, or **Measure**(s) box, and click the arrow.

5. On the **Data** tab, do one or more of the following.

Goal	Action
Show in a chart the first row in a grouped data item.	In the **Mode** box, click **By Row**.
Show in a chart the first column in a grouped data item.	In the **Mode** box, click **By Column**.
Swap rows and columns. You must have at least one grouped data item.	Click **Pivot data.** If you swap rows and columns in a chart that is grouped by rows, it becomes grouped by columns.
Plot null data.	Select the **Plot null data** check box.
Plot negative data.	Select the **Plot negative data** check box.

6. Click **OK**.

More Info

What if ...

- You are upgrading a chart and the chart does not have the correct number of data values specified for the chart type?

  You can upgrade or open the report but you receive a warning. You cannot apply the settings for the chart until the required data values are specified.
- You want to remove a chart?

  Select the chart and press the Delete key.
- You want to create a 100% pie chart?

  Select the pie chart type, and then on the Format tab of the Chart Properties dialog box, click Properties. In the Properties dialog box, on the Data Labels tab, select the Show Values and As Percentage check boxes.
- You want to create a percent or stacked bar chart?

  Select the bar chart type, and then on the Format tab of the Chart Properties dialog box, click Properties. In the Properties dialog box, on the Layout tab, select Percent or Stacked.
- You want to create a horizontal bar chart?

  In the Chart type list, select Bar chart, and then on the Format tab of the Chart Properties dialog box, click Properties. In the Properties dialog box, on the Layout tab, under Axes, select the Horizontal option.
- You want to create a bar chart with depth that is horizontal and 100% stacked.

  In the Chart type list, select Bar chart, and then on the Format tab of the Chart Properties dialog box, click Properties. In the Properties dialog box, on the General tab, click Depth and specify the amount of depth. On the Layout tab, select Stacked and Horizontal.
- You want to create a three-dimensional bar chart.

  In the Chart type list, select Bar chart, and then on the Format tab of the Chart Properties dialog box, click Properties. In the Properties dialog box, on the Layout tab, select True 3D Column. The three-dimensional layout is only available when the bar chart plots data vertically, that is, on the x-axis.

Tips

- To quickly access the Chart properties, right-click the chart and click Properties.

Related Topics

- "Choosing a Chart Type" (p. 105)
- "Format a Chart" (p. 109)

Change the Chart Type

Description

There are many chart types that you can choose when adding a chart to a report. Choosing the appropriate chart type depends on the purpose of the chart. For example, if you want to compare parts to the whole, a pie chart is suitable. If you want to compare quantitative data such as annual sales, you may want to use a bar chart. For more information, see "Choosing a Chart Type" (p. 105).

Charts plot data values on one or more axis. If you change chart type, ensure that you specify data values for each of the required axes.

Steps

1. Right-click the chart and click **Properties**.

   Check that the **Chart Properties** dialog box opened. If another dialog box opened instead, you did not have the chart selected. Click **Cancel** to close the dialog box, press Esc to clear your selection, and try again.
2. In the **Chart type** box, click a chart type.
3. Click the **Data** tab and specify any additional data values, if required.

   For example, a pie chart requires only primary axis values whereas a scatter chart requires both primary and secondary axis values.
4. Click **OK**.

Related Topics

- "Format a Chart" (p. 109)
- "Add Chart Titles" (p. 110)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Format Chart Titles, Axis Titles, Data Labels, and Legend Text" (p. 111)
- "Change the Axis Labels and Scale Settings" (p. 112)
- "Change the Grids Settings" (p. 114)
- "Format Data Items" (p. 114)
- "Hide or Show Data Labels in a Chart" (p. 115)
- "Add and Format a Chart Legend" (p. 115)
- "Show TrendLines" (p. 117)

Format a Chart

Description

There are many formatting options that you can use to enhance your charts. For example, you can add a footnote, change the chart background color, add a legend, and so on.

When formatting charts, you can define properties that apply to the entire chart or to particular data items in the chart. To format particular data items, use the Customize per Data Item dialog box. (p. 114) To define chart properties that apply globally, use the Properties dialog box.

Steps

1. Right-click the chart, click **Properties,** and then click the **Format** tab.

   Check that the **Chart Properties** dialog box opened. If another dialog box opened instead, you did not have the chart selected. Click **Cancel** to close the dialog box, press Esc to clear your selection, and try again.

2. Click the **Format** tab and use the available controls to set the chart properties. The tabs and settings that appear can vary depending on the chart type you select. Here are some of the formatting changes you can make.

Goal	Action
Specify a layout type such as stacked, percent, and true 3D column.	Click **Properties**, and click the **Layout** tab.
Add data labels.	Click **Properties**, and click the **Data Labels** tab.
Add a legend.	Click **Properties**, and click the **Look** tab.
Add dual axes.	Click **Properties**, and click the **Layout** tab.
Show trendlines.	Click **Trendlines**.
Add a chart title, subtitle, or footnote. Add a title for the category or value axis. Add a series title.	Click **Titles**.
Customize the grids and scales of the category axis, y-axis, and series axis.	Click **Grids and Scales**.
Customize data items.	Click **Customize per Data Item**.
Change the chart, plot or legend background color.	In the **Chart background** box, click the item to format, and click **Edit**.
Change the font formatting of such chart characteristics as chart titles, legend text, and data labels.	In the **Font formatting** box, click the item to format, and click **Edit**.

3. To accept your formatting changes, click **OK**.

Related Topics

- "Change the Chart Type" (p. 109)
- "Add Chart Titles" (p. 110)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Format Chart Titles, Axis Titles, Data Labels, and Legend Text" (p. 111)
- "Change the Axis Labels and Scale Settings" (p. 112)
- "Change the Grids Settings" (p. 114)
- "Format Data Items" (p. 114)
- "Hide or Show Data Labels in a Chart" (p. 115)
- "Add and Format a Chart Legend" (p. 115)
- "Show TrendLines" (p. 117)

Add Chart Titles

Description

Charts can have a main title, a subtitle, a footnote, a category axis title, a Y1 axis title, a Y2 axis title, and a series axis title.

You can specify a title for the Y1 and Y2 axes, if your chart has dual value axes. The series axis title is available only for three-dimensional charts. The category and value titles (Y1 and Y2) are available only in charts that use the x-axis and y-axis, respectively.

Steps

1. Right-click the chart, click **Properties,** and then click the **Format** tab.

   Check that the **Chart Properties** dialog box opened. If another dialog box opened instead, you did not have the chart selected. Click **Cancel** to close the dialog box, press **Esc** to clear your selection, and try again.

2. On the **Format** tab, click **Titles**, and then in the **Titles** dialog box, choose from the available options. Select the
   - **Title** check box and type a main title for the chart
   - **Subtitle** check box and type a subtitle. A subtitle appears beneath the main title.
   - **Footnote** check box and type a footnote. A footnote appears in the lower, right-hand corner of the chart.
   - **Category Title** check box and type a title for the x-axis
   - **Value Title (Y1)** check box and type a title for the Y1-axis
   - **Value Title (Y2)** check box and type a title for the Y2-axis
   - **Series Axis** check box and type a series title

3. Click **OK**.

   After you have added a title, you can format it using the **Font formatting** box located on the **Format** tab of the **Chart Properties** dialog box. See, (p. 111).

More Info

What if ...

- You want to remove titles?

  Clear the appropriate check box: Title, Subtitle, Footnote, Category Title, Value Title (Y1) Value Title (Y2) and Series Axis.

Related Topics

- "Change the Chart Type" (p. 109)
- "Format a Chart" (p. 109)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Format Chart Titles, Axis Titles, Data Labels, and Legend Text" (p. 111)
- "Change the Axis Labels and Scale Settings" (p. 112)
- "Change the Grids Settings" (p. 114)
- "Format Data Items" (p. 114)
- "Hide or Show Data Labels in a Chart" (p. 115)
- "Add and Format a Chart Legend" (p. 115)
- "Show TrendLines" (p. 117)

Format Chart Titles, Axis Titles, Data Labels, and Legend Text

Description

Certain chart objects such as chart and axis titles, data labels, and legend text permit font formatting. Font formatting includes specifying font color, size, style and alignment. Certain objects, such as data labels, also permit rotation. Rotating objects can be useful when you want to avoid overlapping text.

Steps

1. Right-click the chart, click **Properties**, and then click the **Format** tab.

   Check that the **Chart Properties** dialog box opened. If another dialog box opened instead, you did not have the chart selected. Click **Cancel** to close the dialog box, press **Esc** to clear your selection, and try again.

2. On the **Format** tab, in the **Font formatting** box, click the object to format, such as **Data Labels**.

3. Click **Edit** and, in the **Formatting** dialog box, specify the format characteristics.
4. Click **OK** twice.

   The chart appears with the new formatting you specified.

Related Topics

- "Change the Chart Type" (p. 109)
- "Format a Chart" (p. 109)
- "Add Chart Titles" (p. 110)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Change the Axis Labels and Scale Settings" (p. 112)
- "Change the Grids Settings" (p. 114)
- "Format Data Items" (p. 114)
- "Hide or Show Data Labels in a Chart" (p. 115)
- "Add and Format a Chart Legend" (p. 115)
- "Show TrendLines" (p. 117)

Format the Chart, Plot, and Legend Area

Description

The chart has three distinct areas that you can format: chart, plot and legend. The plot area is that area of the chart enclosed by the x-axis and the y-axis. The legend area refers to the legend background. The chart area includes the remaining areas other than the plot and legend areas.

For the chart, plot and legend areas, you can customize the line and fill properties.

Steps

1. Right-click the chart, click **Properties**, and then click the **Format** tab.

   Check that the **Chart Properties** dialog box opened. If another dialog box opened instead, you did not have the chart selected. Click **Cancel** to close the dialog box, press **Esc** to clear your selection, and try again.
2. On the **Format** tab, in the **Chart background** box, click the chart, plot or legend area, and then, click **Edit** to specify the fill color, pattern, and pattern color.
3. Click **OK** twice.

   The chart appears with the new formatting you specified.

Related Topics

- "Change the Chart Type" (p. 109)
- "Format a Chart" (p. 109)
- "Add Chart Titles" (p. 110)
- "Format Chart Titles, Axis Titles, Data Labels, and Legend Text" (p. 111)
- "Change the Axis Labels and Scale Settings" (p. 112)
- "Change the Grids Settings" (p. 114)
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- "Add and Format a Chart Legend" (p. 115)
- "Show TrendLines" (p. 117)

Change the Axis Labels and Scale Settings

Description

Customize the axis labels and scale settings in a chart to enhance your charts.

Note that the tabs and settings that appear in the Grids and Scales dialog box can vary depending on the chart type you select.

Steps

1. Right-click the chart, click **Properties**, and then click the **Format** tab.
2. On the **Format** tab, in the **Display options** box, click **Grids and Scales**.
3. In the **Grids and Scales** dialog box, click the axis to format.

   Depending on the chart type and chart layout, you can have a Y1 axis, Y2 axis, X Axis, Category Axis, Z Axis, and Series Axis. The Series Axis is only valid for three-dimensional charts. The Y2 Axis appears when the chart has dual axes. The Z Axis appears for bubble and scatter charts.
4. On the **General** tab, specify where you want the axis labels to be located.

   In addition to specifying the location, you can arrange the value labels in descending order and the category labels in reverse order.
5. On the **Labels** tab, choose whether to show or hide the axis labels.

   For the X Axis, you can stagger the labels or manually set the number of categories you want to show.

   For the Y Axis, you can specify whether to show the maximum or minimum value label.
6. On the **Scales** tab, format the chart scale. Note that the **Scales** tab is not available if the **Series Axis** or **Category Axis** tab is selected.

   Here are the formatting changes you can make.

Goal	Action
Specify a logarithmic scale	Select the **Make Logarithmic** check box.
Start the scale with zero	Select the **Always Include Zero** check box.
Manually set the maximum value on the scale	Select the **Set Maximum Value** check box, and enter a value in the box.
Manually set the minimum value on the scale	Select the **Set Minimum Value** check box, and enter a value in the box.

7. Click **OK** twice to accept your formatting changes.

Tip: After you have added axis labels to the chart, you can specify such characteristics as font style, color, alignment, and rotation. For more information, see (p. 111).

Related Topics

- "Change the Chart Type" (p. 109)
- "Format a Chart" (p. 109)
- "Add Chart Titles" (p. 110)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Format Chart Titles, Axis Titles, Data Labels, and Legend Text" (p. 111)
- "Change the Grids Settings" (p. 114)
- "Format Data Items" (p. 114)
- "Hide or Show Data Labels in a Chart" (p. 115)
- "Add and Format a Chart Legend" (p. 115)
- "Show TrendLines" (p. 117)

Change the Grids Settings

Description

Grid settings let you add major and minor grid lines to a chart and add and specify the location of grid labels.

Note that the tabs and settings that appear in the Grids and Scales dialog box can vary depending on the chart type you select.

Steps

1. Right-click the chart, click **Properties**, and then click the **Format** tab.
2. On the **Format** tab, in the **Display options** box, click **Grids and Scales**.
3. In the **Grids and Scales** dialog box, click the axis to format.

   Depending on the chart type and chart layout, you can have a Y1 axis, Y2 axis, X Axis, Category Axis, Z Axis, and Series Axis. The Series Axis is only valid for three-dimensional charts. The Y2 Axis appears when the chart has dual axes. The Z Axis appears for bubble and scatter charts.
4. On the **Grids** tab, specify whether to show the major and minor grid lines.

   If you add grid lines, you can specify a grid style, such as **Outer Ticks**, and you can manually specify the grid intervals.

   For certain charts, you can also add and specify the location of a custom grid line by selecting the **Draw Custom Line at** check box.
5. Click **OK** twice to accept your formatting changes.

Related Topics

- "Change the Chart Type" (p. 109)
- "Format a Chart" (p. 109)
- "Add Chart Titles" (p. 110)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Format Chart Titles, Axis Titles, Data Labels, and Legend Text" (p. 111)
- "Change the Axis Labels and Scale Settings" (p. 112)
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- "Add and Format a Chart Legend" (p. 115)
- "Show TrendLines" (p. 117)

Format Data Items

Description

Formatting the data items in a chart can enhance the appearance of the chart and better communicate information in the chart. Depending on the chart type, you can set data item properties such as color, line style, marker style, and marker size.

Steps

1. Right-click the chart, click **Properties**, and then click the **Format** tab.

   Check that the **Chart Properties** dialog box opened. If another dialog box opened instead, you did not have the chart selected. Click **Cancel** to close the dialog box, press **Esc** to clear your selection, and try again.
2. Click **Customize Per Data Item** and set any properties you want for any data items, then click **OK** twice.

Related Topics

- "Change the Chart Type" (p. 109)
- "Format a Chart" (p. 109)

- "Add Chart Titles" (p. 110)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Change the Axis Labels and Scale Settings" (p. 112)
- "Change the Grids Settings" (p. 114)
- "Hide or Show Data Labels in a Chart" (p. 115)
- "Add and Format a Chart Legend" (p. 115)
- "Show TrendLines" (p. 117)

Hide or Show Data Labels in a Chart

Description

You can hide or show data labels in a chart. You can also format the data labels by adding bolding, for example, as well as changing the font type and size.

Steps

1. Right-click the chart, click **Properties,** and then click the **Format** tab.
2. On the **Format** tab, in the **Display** options box, click **Properties**.
3. In the **Properties** dialog box, click the **Data Labels** tab.
4. To have data labels appear in the chart, select the **Show Data Labels** check box.
5. In the **Labels Location** box, choose where you want the labels located. You can choose
    - **Outside Maximum**
    - **Inside Maximum**
    - **Center**
    - **Base of Chart**
6. In the **Label Format** box, choose how labels appear. You can specify
    - **Value**
    - **Label**
    - **Label & Value**
7. Click **OK** twice.

Related Topics

- "Change the Chart Type" (p. 109)
- "Format a Chart" (p. 109)
- "Add Chart Titles" (p. 110)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Format Chart Titles, Axis Titles, Data Labels, and Legend Text" (p. 111)
- "Change the Axis Labels and Scale Settings" (p. 112)
- "Change the Grids Settings" (p. 114)
- "Format Data Items" (p. 114)
- "Add and Format a Chart Legend" (p. 115)
- "Show TrendLines" (p. 117)

Add and Format a Chart Legend

Description

You can include a chart legend with your chart. When you add a legend, the chart is resized within the boundaries of the chart frame to accommodate the legend. You may have to adjust the chart frame to better present the chart and the legend together. When legend markers do not appear in the legend because there are too many to fit within the legend boundaries, an arrow indicates that there are more markers.

After you add a legend, you can specify the location of the legend relative to the chart. You can also specify the location of the markers and legend text and set the style of the legend frame.

If you are upgrading charts with legends, the legend will appear to the right of the chart and legend markers to the left of the legend text. You can change this if you want.

Steps

1. Right-click the chart, click **Properties,** and then click the **Format** tab.

   Check that the **Chart Properties** dialog box opened. If another dialog box opened instead, you did not have the chart selected. Click **Cancel** to close the dialog box, press **Esc** to clear your selection, and try again.
2. On the **Format** tab, click **Properties**, and on the **Look** tab, click **Show Legend**.
3. In the **Markers and Text** box, specify the location of legend markers and text by clicking one of the following:
   - **Markers to Left of Text**
   - **Markers to Right of Text**
   - **Text Centered on Marker**
   - **Markers Above Text**
   - **Markers Below Text**
4. In the **Layout** box, specify the location of the legend. You can specify
   - **Legend on the Right Side**
   - **Legend on the Left Side**
   - **Legend Below Chart**
5. In the **Box Style** box, specify whether to include a box frame and the box style for the legend.
6. Click **OK** twice.

   The chart legend appears in the chart with the characteristics you specified.

What if ...

- You are upgrading charts with legends?

  The legend shows to the right of the chart. Legend markers show to the left of the legend text.
- You want to change the font type, style, and color of the text in the legend.

  On the Format tab, in the Font formatting box, specify Legend text and click Edit.
- You want to exchange the values in the legend for the values on the primary axis?

  In the Chart Properties dialog box, click the Data tab and select the Pivot data check box. The Pivot data check box is not valid for some types of charts.

Related Topics

- "Change the Chart Type" (p. 109)
- "Format a Chart" (p. 109)
- "Add Chart Titles" (p. 110)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Format Chart Titles, Axis Titles, Data Labels, and Legend Text" (p. 111)
- "Change the Axis Labels and Scale Settings" (p. 112)
- "Change the Grids Settings" (p. 114)
- "Format Data Items" (p. 114)
- "Hide or Show Data Labels in a Chart" (p. 115)
- "Show TrendLines" (p. 117)

Show TrendLines

Description

A trendline is a line that indicates the general direction of a series of data over time. For example, are production costs trending up? Are sales increasing year after year?

Important: Trendlines do not predict the future. They merely show trends in data based on historical information.

A trendline can connect all actual data points or it can be a line that is computed mathematically, such as the moving average line. In the latter instance, the line smooths the fluctuations of the actual data points in the series. The data points through which the trendline is drawn, or that it approximates, can represent individual data elements or groups of data elements such as averages or medians.

You can add trendlines to the following charts: area, bar, line, and scatter.

You can draw linear, logarithmic, polynomial, exponential and moving average trendlines.

Steps

1. Right-click the chart, click **Properties**, and then click the **Format** tab.

   Check that the **Chart Properties** dialog box opened. If another dialog box opened instead, you did not have the chart selected. Click **Cancel** to close the dialog box, press **Esc** to clear your selection, and try again.
2. On the **Format** tab, click **Trendlines**, and select the **Show Trendlines** check box. With trendlines selected, you can then make the following changes:

Goal	Action
Specify the type of trendline to draw.	In the **Regression Type** box, click a trendline type. For a polynomial trendline, you must specify the degree of linear regression in the **Order** box. The value must be greater than one but no greater than the number of groups in the chart. For **Moving Average**, you must specify the number of periods in the **Period** box. The value must be greater than 1 and less than the number of groups.
In the chart, show the equation that was used to calculate the trendline.	Select the **Show Equation** check box.
In the chart, show the coefficients values used to draw the trendline.	Select the **Show Coefficients Values** check box.
Have the trendline appear in the same color as the selected data series.	Select the **Show Color same as Series** check box.

3. Click **OK** twice.

Related Topics

- "Change the Chart Type" (p. 109)
- "Format a Chart" (p. 109)
- "Add Chart Titles" (p. 110)
- "Format the Chart, Plot, and Legend Area" (p. 112)
- "Format Chart Titles, Axis Titles, Data Labels, and Legend Text" (p. 111)
- "Format a Chart" (p. 109)

- "Change the Axis Labels and Scale Settings" (p. 112)
- "Change the Grids Settings" (p. 114)
- "Hide or Show Data Labels in a Chart" (p. 115)
- "Add and Format a Chart Legend" (p. 115)

Correlation Chart

A correlation chart plots data using columns or bars and a line. To identify the data item plotted by the line, see the Chart Properties, Data tab, Primary Axis box while in a chart. The last data item listed in the Primary Axis box is plotted by a line on the Y2 axis. This data item cannot be moved to the Y1 Axis.

A correlation chart always has a dual axis. To view the data items plotted by the Y1 and Y2 Axis, see the Properties dialog box, Dual Y Options tab.

For information about how to create a correlation chart, see (p. 118).

For information about how to format a correlation chart, see (p. 118).

Example - Create a Correlation Chart to Show Order Income Relative to Order Revenue

You are a report author at The Great Outdoors Company. You are requested to create a chart that shows the correlation between order revenue and order income from 2004 to 2006. You decide to create a correlation chart because it allows you to correlate two dissimilar measures.

Steps

1. From the **File** menu, click **New** and on the **FastFind** tab, click **Blank**, and click **OK**.
2. In the **Open Catalog** dialog box, click **gosales.cat** and click **Open**.
3. If you are prompted for a userid and password, type **Administrator** in the **UserID** box and leave the **Password** box empty. Click **Log On**.
4. In the **Catalog Logon for GOSALES.CAT** dialog box opens, accept the default values and click **OK**.
5. In the **Query** dialog box, define the report query as follows:
   - Click the calculation button and in the **Calculation Definition** dialog box, create the expression, `year (Orderdate)`, name it Order Year, and click **OK**.
   - On the **Data** tab, add **Order Income**, and **Order Revenue** to the **Query data** box.
   - On the **Group** tab, click **Order Year** and click **Group**. Click **Order Income** and click **Associate**. Do the same for **Order Revenue**. Click **OK**.
6. From the **Insert** menu, click **Chart Frame** and drag the pointer to create the chart frame.
7. In the **Chart Properties** dialog box, in the **Primary Axis** box, remove the data items listed by default, and add **Order Revenue** followed by **Order Income**. Click **OK**.
8. Right click the chart, click **Properties**, and in the **Chart type** box, click **Correlation** and click **OK**.

   The last data item in the **Primary Axis** list appears as a line in the correlation chart. In our example, this is **Order Income**.
9. Save the report and name it correlation_chart.imr.

   You are now ready to format the chart (p. 118).

Example - Format the Correlation Chart Correlation_chart.imr

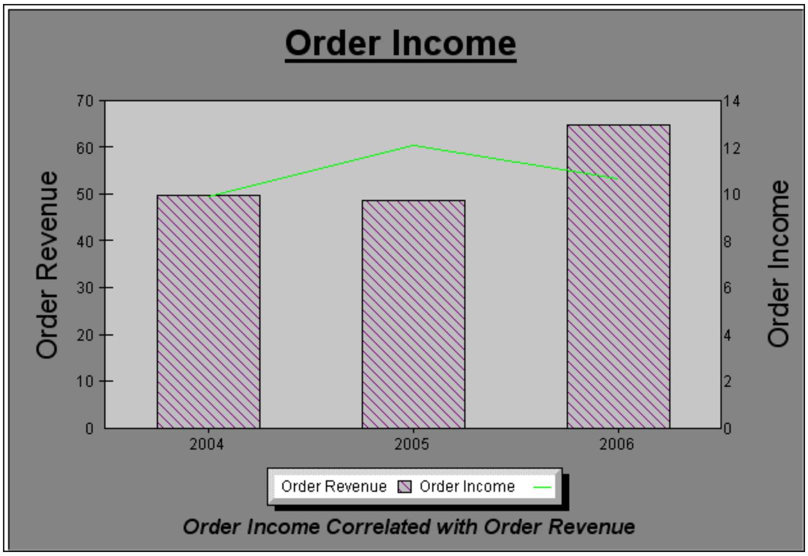
You created a correlation chart named correlation_chart.imr that shows the relationship between order revenue and order income (p. 118). You want to format this chart before you distribute it throughout your department.

Steps

1. With **correlation_chart.imr** open, right-click on the chart, click **Properties**, and click the **Format** tab.
2. In the **Chart background** box, click **Chart area**, and **Edit**. On the **Fill** tab, click dark gray and click **OK**.

3. In the **Chart background** box, click **Plot area**, and **Edit**. On the **Fill** tab, click light gray and click **OK**.
4. Click **Titles**, and add a **Title**, **Footnote**, **Value Title** (**Y1**) and **Value Title** (**Y2**). Name them as follows:
   - for **Title**, type **Order Income**
   - for **Footnote**, type **Order Income Correlated to Order Revenue**
   - for **Value Title** (**Y1**), type **Order Revenue**
   - for **Value Title** (**Y2**), type **Order Income**
5. To format the chart titles, in the **Font formatting** box, click the title, and click **Edit**. In the **Formatting** dialog box, specify the font, font size and style and alignment.
6. To add a legend, click **Properties**, click the **Look** tab, specify the following legend settings and click **OK**:
   - **Markers to the Right of Text**
   - **Legend below Chart**
   - **Beveled Frame**
7. To customize the data items in the chart, click **Customize per Data Item**. In the **Color** column, click the **Order Revenue** color. In the **Formatting** dialog box, click **Pattern**, and specify a pattern. Experiment with different background and foreground colors until you get an acceptable combination. Click **OK**.

   Your chart should look something like this:



Tip: To make the bars in the chart narrower, increase the gap width. On the **Format** tab, click **Properties**, and on the **General** tab, increase the **Gap Width** value.

Chapter 18: Reporting While Disconnected From the Database

When you are disconnected from the database, you can use a snapshot to work with reports. A snapshot is a permanent local copy of the data in your report. Like a photograph, a snapshot captures a picture of the data as it existed when you created the snapshot.

Snapshots

When you open a snapshot report, the report accesses data stored in a snapshot located on your personal computer.

Why Use Snapshots?

Snapshots let you

- save historical data that otherwise would be updated or lost
- access and manipulate data when you are unable to attach to the database
- minimize data processing when the network traffic for the database is heavy
- e-mail a report and its data to someone as a file attachment

You can also save a snapshot as another file format. For more information about the file formats available see, "Export a Report" (p. 21).

Used properly, snapshots can improve the efficiency of your report.

Because each snapshot is its own independent, static data source, certain restrictions apply to snapshots.

What You Can Do

You can

- drag and drop to move parts of a report within the snapshot report
- Ctrl+drag to make copies of parts of a report

What You Cannot Do

You cannot

- add new data to a snapshot such as new tables or new filters
- create new calculations that are based on data items that are not part of the snapshot
- cut and paste or drag and drop data between snapshot reports
- save a report that contains sub-reports as a snapshot

When you save a snapshot with your report, the data and the report are saved as one file, and the data in the report is static. If the database for your report is updated after a snapshot is taken, the data in the snapshot does not change to reflect the updates. If you want to use the updated data, you must refresh the snapshot.

Note

- Do not use snapshots to send highly sensitive or confidential information. No security measures are included in a snapshot. As a result, snapshots can be accessed by anyone with Impromptu.

Comparing Snapshots to HotFiles

When you use a snapshot, you separate the report from its original data source. Other Impromptu users can access a snapshot report without having to connect to the original source database or catalog. All you need is Impromptu to run the report.

A HotFile is a table of data. You need a catalog to bridge the report and the HotFile it accesses. You need Impromptu and the catalog to view a report that uses a HotFile.

You can save historical data using either a snapshot or a HotFile. The following table compares snapshots to HotFiles:

Snapshots	HotFiles
Are integrated with the report. You cannot add new data to the report.	Are separate, local data tables. A HotFile that is included in the catalog enables you to add additional data to the report.
Have many cut and paste restrictions.	Have no cut and paste restrictions.
Cannot be added to your catalog.	Can be added to your catalog.
Cannot be used to create a new report with data.	Can be used to create a new report with data.
Stand alone.	Do not stand alone.
Do not require catalog access.	Require catalog access.
You cannot apply filters or calculations that use data not included in the snapshot.	You can add filters and calculations.

What You Can Do with a Snapshot but Not with a HotFile

With a snapshot, you can

- have all the data you need for your report in one file
- e-mail your report to someone as a single file attachment
- open a report without accessing a catalog

Related Topics

- "Retrieve Data from the Database" (p. 37)
- "Create a Local Copy of the Report Data" (p. 122)
- "Refresh a Local Copy of the Report Data" (p. 123)
- "Remove a Local Copy of the Report Data" (p. 124)

Create a Local Copy of the Report Data

Description

A snapshot is a permanent local copy of the data in your report. Like a photograph, it captures the data as it existed when you created the snapshot.

Example

You create and save a snapshot of the current monthly sales report to compare it to future monthly sales reports.

Steps

1. From the Report menu, click Query and click the Access tab.
2. In the Data Source box, click the Local Snapshot option button and click OK.

   The indicator on the lower-right corner of the Impromptu window shows the Snapshot icon.


Snapshot icon

More Info

Notes

- You cannot save a report that contains sub-reports as a snapshot.
- You can save a snapshot as another file format. The file formats available in Impromptu include Delimited ASCII, Excel with Format, HotFile, PDF, XML, Hypertext Markup Language and text.
- The Show SQL box (Profile tab, Query dialog box) shows the SQL required to create the snapshot. If you add filters or calculations to the snapshot, the SQL box doesn't change.

Tips

- To quickly create a snapshot, click the Snapshot button on the toolbar.


Snapshot button

- To save your report as a snapshot, from the File menu, click the Save As command and select the Save a Snapshot with the Report check box.

What if...

- The Save a Snapshot With the Report option (Save As dialog box) and the Snapshot button are not available?

  The report is already a snapshot or the report contains sub-reports. You cannot save a report that contains sub-reports as a snapshot.
- You do not have an Access tab?

  From the Tools menu, click Options, and click the General tab. Select the Show Advanced Tabs in the Query Dialog Box check box.

Related Topics

- "Reporting While Disconnected From the Database" (p. 121)

Refresh a Local Copy of the Report Data

Description

You can refresh a snapshot with the current data to reflect the most recent changes in the database. When you refresh a snapshot, the data from the original snapshot is lost.

Example

The latest sales data for the last quarter has been updated in the database. Before you go away on business, you add the new sales data by refreshing your snapshot.

Steps

1. From the Report menu, click Query and click the Access tab.
2. In the Data Source box, click the Database option button and click OK to reconnect to the database.
3. Repeat step 1 to show the Access tab (Query dialog box).
4. Click the Local Snapshot option button and click OK to capture the new database information.

   Impromptu refreshes your snapshot with the new data from the database.

More Info

Tip

- To quickly refresh a snapshot with the current data, click the Snapshot button on the toolbar. In the Report Snapshot dialog box, click Refresh the Snapshot and click OK.

What if ...

- You do not have an Access tab?

  From the Tools menu, click Options, and click the General tab. Select the Show Advanced Tabs in the Query Dialog Box check box.

Related Topics

- "Reporting While Disconnected From the Database" (p. 121)

Remove a Local Copy of the Report Data

Description

When you need more data than is in the snapshot, you can remove a snapshot from a report and retrieve data from the database instead.

Example

The snapshot you created last month for your accounts payable report only contains the data from the San Diego office. Since you now need data from the entire west coast, you remove the snapshot from the report and redirect your query to the database.

Steps

1. From the Report menu, click Query and click the Access tab.
2. In the Data Source box, click Database, and then click OK.

   Your query retrieves the data from the database. The indicator on the lower-right corner of the Impromptu window now shows the database icon.

More Info

Tip

- To quickly remove a snapshot from a report, click the Snapshot button on the toolbar. In the Report Snapshot dialog box, click Remove the Snapshot and then click OK.

What if ...

- You do not have an Access tab?

  From the Tools menu, click Options, and click the General tab. Select the Show Advanced Tabs in the Query Dialog Box check box.

Related Topics

- "Reporting While Disconnected From the Database" (p. 121)

Chapter 19: Drill Through to Cognos Query

Description

If you use Impromptu Web Reports to distribute your reports over the Web, you can set up drill-through access to Cognos Query. Impromptu Web Report users can view your Impromptu reports in PDF format, drill through to Cognos Query, and then explore the data in their Web browsers. Before you publish the report in Impromptu Web Reports, you can test drill-through access by drilling through from the Impromptu report.

Steps

1. Open the report to drill through to Cognos Query.
2. Select a report item that has drill-through access set up.
3. From the Report menu, click Drill Through and then click Cognos Query.
   The Drill Through URLs to Cognos Query dialog box appears.
4. Click the query that users will drill to and then click Execute URL.

Related Topics

- "Import a Query from Cognos Query" (p. 35)
- "Select the Cognos Query Server" (p. 125)
- "Set Up Drill-Through Access to Cognos Query" (p. 126)
- "View the Details of a Value in a Report" (p. 10)

Select the Cognos Query Server

Description

Specify a Cognos Query server before you test drill-through access from the Impromptu report.

Steps

1. Open Impromptu.
2. From the Tools menu, click Options and then click the Drill Through tab.
3. In the Cognos Query Server box,
   - for a simple install, type your Web server name (for example, wotalaventus1).
   - for a distributed install, type the location and name of the Cognos Query gateway.
4. Click OK.

More Info

Note

- The default protocol for drill through to Cognos Query is /cognos/cgi-bin/cqcgi.exe.

Related Topics

- "Drill Through to Cognos Query" (p. 125)

Set Up Drill-Through Access to Cognos Query

Description

You can use Impromptu Query Definition files (*.iqd) to set up drill-through access to Cognos Query. However, before you save a query in Cognos Query, click the Enable Drill Through Properties check box to store information about the query in an Impromptu Query Definitions file (*.iqd).

Steps

1. Open Impromptu.
2. Open the parent report (the one that users will drill from) and click any data item.
3. From the Report menu, click Drill Through and then click Properties.

   The Drill Through Properties dialog box appears.

   Note: If the Drill Through Properties command (Report menu) is unavailable, click Options (Tools menu), select the Drill Through tab, and then select the Enable Drill Through Properties check box.
4. Select the column you want to drill through to a query from Cognos Query and click Add.

   The Add Drill Through Query/Report dialog box appears.
5. Select any additional columns that you want to include in the drill-through report filter.
6. Type file name for the drill-through query (*.iqd), or click Browse to find it.
7. Click OK twice.

   Impromptu validates the file name for the query report, but does not verify whether the selected columns exist in the query from Cognos Query.

Related Topics

- "Drill Through to Cognos Query" (p. 125)
- "Import a Query from Cognos Query" (p. 35)

Chapter 20: Prepare a Report for Impromptu Web Reports

Prepare a Report for Impromptu Web Reports

You can deliver Impromptu reports to the Web either by using Impromptu Web Reports or by publishing them directly to Upfront via the IWR server. When you change Impromptu reports to package them for Impromptu Web Reports, be aware of the report characteristics described in this chapter. For information about publishing reports directly to Upfront, see the Impromptu *Administration Guide*.

Bookmark with Undefined Destination

If you use a data item to group the data in a report, but do not include it in the report, then Impromptu Web Reports generates a bookmark that has no destination in the PDF report.

CognosScript and Macros

Impromptu Web Reports does not support CognosScript or AutoRun macros. If your report uses these features, your report administrator can automate the reports using events. The report administrator may also need to create HotFiles for dependent reports, because these reports are usually executed in Impromptu by using macros.

Connection String and Multiple Servers

Work with the report administrator to determine a strategy for providing all report servers with the same database connection string. If the current database connection string in the catalog cannot be used by the report servers, you may have to modify the string before the catalog is published to the Web.

For more information, see your report administrator.

Database Userid and Password

If you are using your Impromptu catalog for security, ensure that the Impromptu catalog you package contains a database userid and password in each user profile. If you are using Access Manager for database security, you don't need to do this.

Note: Catalogs generated in Architect always use Access Manager for database security.

Distributed Catalogs

You should disconnect personal catalogs used in Impromptu Web Reports from the master catalog. Any changes to the master catalog are not reflected in your personal catalogs.

If you package reports that access an Impromptu distributed catalog and the master catalog is updated, you must repackage your reports with the updated personal catalog. Ensure that you don’t include the master catalog with your repackaged reports and personal catalog.

Drill-Through Access to More Than One Report or Query

You can set up drill-through access to more than one report or query from the same report column. After you publish the report in Impromptu Web Reports, drill-through access is available to PDF and HTML report formats. With this access, report consumers can drill through to any of the reports or queries you set up.

For more information about setting up drill-through in Impromptu Web Reports, see the *Cognos Web Portal User Guide*.

Failure to Publish From Impromptu to Impromptu Web Reports with Anonymous Access Configured in Access Manager

If anonymous access is enabled in Access Manager, you cannot publish from Impromptu to Impromptu Web Reports. Instead, you will receive an error saying that there was a failure to obtain a ticket.

To publish from Impromptu to IWR disable anonymous access in Access Manager.

Fit to Page

The Fit to Page feature only affects how Impromptu prints your report; it does not affect how Impromptu Web Reports displays your report in PDF format.

OLE automation and OLE Objects

If some reports contain links to OLE objects, you need to copy those objects manually to the Impromptu Web Reports server.

Note: OLE objects may not always behave as expected in the Web environment, and are valid only under Windows. In Web reporting applications, you should consider other alternatives.

Prepare HotFiles

If the report set contains HotFiles, you must know which operating systems the report set is going to be published on. For example, the format of HotFiles is different for UNIX and Windows. HotFiles for use on an Impromptu Web Reports server running on UNIX must be generated in UNIX.

If your report set is being published to Impromptu Report Servers that run

- only in Windows, include the HotFile in the report set
- both Windows and UNIX, you must repackage the HotFile each time you update the report set
- only in UNIX, the report administrator must create the HotFile in UNIX for you to include in the final report set

For more information, see "Package HotFiles" (p. 129).

Repeated Bookmarks in PDF Reports

When you create reports in Impromptu, do not insert a data item into the page header. If you do, Impromptu Web Reports generates the report with repeated bookmarks that link only to the page where the page header changes.

Restriction on Using Equals Sign in Prompt Names

Report authors and administrators who publish to Impromptu Web Reports should be aware of the following restriction when creating report prompts: if the prompt name contains an Equals sign (=), users will be unable to run a report based on that prompt.

Only by deleting the non-supported character from the prompt name and republishing the report can the user successfully select a prompt and run the requested report.

Screen Layout View

You must change all reports in Screen Layout view to Page Layout view because Impromptu Web Reports shows all reports in Page Layout view.

Using a Locked Catalog

Impromptu administrators can add a lock to a catalog. In Impromptu Web Reports, the catalog Creator user class cannot run reports using a locked catalog. If a user attempts to run a report using the catalog Creator user class, they receive an error message. To run the report successfully, use a non-Creator user class.

View Reports in Excel

Some limitations apply when exporting reports to Excel. For more information, see *Mastering Impromptu Reports*.

Related Topics

- "Create Burst Reports" (p. 129)
- "Notify the Report Administrator" (p. 130)

Create Burst Reports

Description

You have to add some user classes and filters when creating a report that will be a burst report in Impromptu Web Reports.

In the Impromptu Administrator, set up the catalog then

Steps

In the Impromptu Administrator, set up the catalog.

1. Open Impromptu.
2. Open the catalog from which you want to generate reports.
3. From the Catalog menu, click User Profiles.
4. Click the User Classes tab and add the user classes you want for your burst report.

   For more information on adding user classes, see the *Mastering Impromptu Reports book*.
5. Click the Filter tab.
6. In the User Class list, click one of your user classes and create a specific filter for it.
7. Repeat step 6 for each user class for which you want to apply a filter.

   Using either the Impromptu User or Impromptu Administrator,
8. Create a new report as the Creator user class and add the required columns (the columns that have a filter or prompt on them).
9. From the Catalog menu, click User Class and click one of your user classes.
10. From the Report menu, click Retrieve to verify that this user class displays a unique report.
11. Repeat steps 9 and 10 for each user class.

    For more information on setting up a burst report in Impromptu Web Reports, see the *Report Administrator's Guide*.

Package HotFiles

Description

Package HotFiles for Both Windows and UNIX

To ensure that a report set can be published to Impromptu Web Reports servers running in either Windows or UNIX, you must package both the original report and the HotFile that it creates in the same directory. This ensures that the directory can be used to publish the report set to either operating system. After the report set is published, the instructions that you give to the report administrator depends on the operating system that the Impromptu Web Reports server runs on:

- If the report set is published to an Impromptu Web Reports server running in Windows, you only need to tell the report administrator to hide the original report from report consumers.
- Reports that source Hotfiles published to UNIX must be run at least once before other IWR reports can access them.

  You must tell the report administrator to perform this procedure every time you publish or update this report set.

Package HotFiles for UNIX

The format of HotFiles is different for UNIX and Windows. HotFiles for use on an Impromptu Web Reports server running on UNIX must be generated in UNIX.

Steps for UNIX only

1. Find the report that creates the HotFile from the report set and package it in the same directory.
2. Tell the report administrator to publish that report set to an Impromptu Web Reports server running on UNIX, run the report (.imr), and save the results in a HotFile using the same name as the original HotFile.
3. Have the report administrator FTP that HotFile back to you.
4. Add the new HotFile to the same directory containing all the reports in the report set.
5. Tell the report administrator to publish the report set to UNIX.

   This ensures that the directory always contains a HotFile that works in UNIX.

Notify the Report Administrator

After you package reports sets, you need to tell the report administrator

- the location of the database and any connection parameters
- the amount of disk space the report set uses
- if the catalog contains a database ID and password
- if the report set is new or updated
- if the report set has been updated, any changes to user profiles
- which reports should be generated as HotFiles
- which reports read or write which HotFiles
- which reports are used as a data source for other reports
- which reports contain links to OLE objects
- which reports use stored procedures or prompts
- which reports use PowerPrompts applications or user-defined functions (UDFs)
- which reports need to be scheduled to run and when
- which reports are dependent on other reports or events
- if any reports contain access to drill-through reports
- who needs to see the reports

For more information about what the report administrator needs to know after the report sets are packaged, see the Impromptu Web Reports *Administrator Guide*.

Chapter 21: PowerPrompts Developer Studio

A PowerPrompts application guides report consumers through a series of HTML pages where they select the information that they want in a report. The report consumer then sees the report that is generated based on the selections. For example, using a PowerPrompts application report consumers can modify

- columns in a report
- column formatting
- a report template
- conditional formatting
- filters
- prompts and prompt values

Use PowerPrompts Developer Studio to create these Web-based applications for Impromptu Web Reports; it is available with both the Administrator and the User versions of Impromptu. PowerPrompts applications do not interfere with the use of report or catalog prompts.

For more information about PowerPrompts, see the PowerPrompts online help.

Chapter 22: Report Specifications

Attribute	Maximum
bitmap size	Limited only by available memory
Column width	Limited only by available memory
Number of group headers and footers	10
Height of headers and footers	Limited only by available memory
Height of report	Limited only by available memory
Largest allowed negative number	Database dependent
Largest allowed positive number	Database dependent
Number of characters in a column name	No known limit
Number of colors available	Limited by the number of colors supported by your monitor or printer
Number of report columns	Limited only by available memory. However, your database may impose a lower limit.
Number of tables in query	128
Number of fonts per report	Limited only by available memory
Number of open reports	Limited only by available memory
Number of sub-reports in report	Limited only by available memory.
Number of Toolbar buttons per Toolbar	100
Number of parameters in a stored procedure call	15
Number precision	Database dependent
Number of printed pages	Limited only by available memory
Row height	Limited only by available memory
Smallest allowed negative number	Database dependent
Smallest allowed positive number	Database dependent
SQL character length	32,766 characters
Report width	Limited only by available memory.

File Searching

Impromptu catalogs and reports use other files. For example, a catalog may

- use a HotFile
- contain a prompt that is a report picklist
- be a distributed catalog pointing to the master distributed catalog

A report includes a reference to a catalog file and can also include references to

- picklist reports
- bitmaps
- HotFiles
- other files

The fully qualified paths for these associated files are stored in the catalog or report. For users to easily share catalogs and reports, Impromptu incorporates file searching capabilities to locate the associated files when a catalog or report is opened.

When a user wants to share a catalog or report, the paths to at least some of the associated files may be different on the other user's computer.

Example

For example, you receive the following from another user:

- a report containing a reference to a .bmp file on the LAN
- a catalog

When you save these files and open the report, Impromptu recognizes that the paths in the report are not current and attempts to find the associated files.

How the Search Works

If you create a catalog or report using an associated file on a network, the path of the associated file is stored in Universal Naming Convention (UNC) format. Paths for local files are stored using local drive letters (LDLs). When an associated file cannot be found using the LDL or UNC path stored in the catalog or report, Impromptu searches for the file in this order:

1. In the current folder.
2. Using the stored path, but replacing the drive letter with the letter of the drive where the catalog or report file currently resides.

   For example, the stored path is D:\1998\Reports. The report is opened on C:. Impromptu searches for C:\1998\Reports.
3. By deriving a relative path from the stored paths.

   For example, the report was in C:\1998\Reports, and the associated file was in C:\1998\Reports\Bitmaps, then Impromptu searches for a \Bitmaps folder where the report file currently resides.
4. Using the actual catalog or report path.
5. Using the workspace path specified in Preferences.
6. Using the catalog path specified in Preferences (if Impromptu is looking for a catalog).
7. Using the report path specified in Preferences (if Impromptu is looking for a report).
8. Using a standard Windows search.

   This includes a search of Impromptu's main folder, the Windows folders and the path variable.

   If the search is unsuccessful, Impromptu asks you to help locate the file.

Notes

- You can store both LDL and UNC paths for a file on a network.
- Impromptu does not use the search capability when you attempt to open a file from the most recent file list in the File menu.
- Enhanced file searching is not available through OLE automation.

Command Line Switches

Description

You can use command line options when you start Impromptu to

- execute a macro
- open a specific report

The complete command line syntax is as follows:

```
IMPADMIN.EXE
   [-m macro-filename]
   [report-name]
```

or

```
IMPUSER.EXE
   [-m macro-filename]
   [report-name]
```

Notes

- You can also execute a macro from within Impromptu or using the Cognos Scheduler.
- Use double quotes to define a file name or pathname containing a space.

Related Topics

- "-m macro-filename" (p. 135)
- "macro-filename" (p. 135)
- "report-name" (p. 135)

-m macro-filename

Opens the macro text file and runs the commands within the file.

Discussion

Use the -m command line option for macros written using the Impromptu Macro Editor.

Example

This command starts Impromptu and specifies the macro to execute:

```
C:\Program Files\Cognos\cer3\bin\IMPADMIN.EXE -m monthly.mac
```

Limit

- 127 is the maximum number of characters for commands entered on the command line.

Related Topics

- "Command Line Switches" (p. 135)

macro-filename

Specifies the name of the macro file.

You can also specify the path for the macro file. By default, Impromptu looks first in the catalog directory and then in the current directory.

Related Topics

- "Command Line Switches" (p. 135)

report-name

Opens the specified report

Discussion

Impromptu retrieves data depending on

- the settings in the Access tab (Query dialog box) that you access from the Report menu
- the preferences you set using the Options command (Tools menu)

Example

This command starts Impromptu and opens a report named summary:

```
C:\Program Files\Cognos\cer3\bin\IMPADMIN.EXE summary.imr
```

Limit

- 127 is the maximum number of characters for commands entered on the command line.

Related Topics

- "Command Line Switches" (p. 135)

Chapter 23: Configuration Files

When you install Impromptu, the setup program automatically creates several .ini (configuration) files. Some of the initialization files created are

- Cognos.ini
- Cer*n*.ini
- Impromptu.ini

If you upgrade from an earlier version of Impromptu, the setup program automatically updates your .ini files with new information and maintains the settings that still apply from the earlier version. Setup ignores settings that no longer apply. When you start Impromptu, it reads the .ini files and uses the settings that were used at the end of the last Impromptu session.

Impromptu uses the .ini files to define your Impromptu environment and configure it to match your preferences. The .ini files store preferences for environmental settings, such as

- formats and styles for report objects
- toolbar buttons
- data access options
- file locations for catalogs and reports

Warning

- Normally, Impromptu or the setup program updates initialization files automatically. If you edit .ini files manually, use caution. Always back up an .ini file before you change it so you can restore the original file if necessary.

Related Topics

- "Cern.ini" (p. 138)
- "Cognos.ini" (p. 138)
- "Function Definition Table (FDT) Files" (p. 138)
- "Impromptu.ini" (p. 139)
- "ini File Format" (p. 137)
- "Use Type Libraries" (p. 151)

ini File Format

.ini files contain several sections of related settings. Each section is in the following format:

```
[section name]
keyname=value
```

[section name]

The name of a section. The starting square bracket must be in the left-most column of the line.

keyname=value

Defines and names the value of a setting. A keyname can consist of any combination of uppercase or lowercase letters, digits, and spaces. The keyname must be followed immediately by an equal sign. The value can be an integer, a string, or a string enclosed in quotation marks.

You can include comments in the .ini files by starting a line with a semicolon (;). Blank lines are ignored.

Related Topics

- "Configuration Files" (p. 137)

Function Definition Table (FDT) Files

FDT files mirror the information in the database function initialization files (.ini) and are created by Impromptu to improve its performance. FDT files are created for a new or modified .ini file the first time the .ini file is read while opening the catalog.

Updating the FDT files requires write privileges in the working directory. Your LAN users may not have the required privileges to create and modify the FDT files. To provide these users with FDT files, open a catalog that accesses the database supported by your enterprise

- when you first copy the Impromptu setup files to the LAN
- each time you modify the .ini file for the supported database

Related Topics

- "Configuration Files" (p. 137)

Cognos.ini

Previous versions of Impromptu created this file in your Windows folder to store configuration information.

Impromptu stores that information in Cer*n*.ini in the Bin folder where Impromptu is installed. The exception is database connection information which remains in the Cognos.ini file.

Cognos.ini includes [Databases] preferences. Each user must have a Cognos.ini file that contains the appropriate database connection strings.

Related Topics

- "Configuration Files" (p. 137)

Cer*n*.ini

Configuration Manager is the user interface for maintaining your rendition settings. For information about these settings, see the Configuration Manager documentation.

The Impromptu state file location setting is Impromptu-specific and must be added explicitly to the rendition file. For a description of this setting, see [Cognos Locations].

Related Topics

- "Configuration Files" (p. 137)

[Cognos Locations]

Specifies other locations of Cognos applications and components.

Impromptu state file location=<path>

Default	The Impromptu state file location setting is not enabled by default. It must be explicitly added to the cer*n*.ini file, where *n* represents the product rendition number.
Description	Identifies where to create or find the Impromptu.ini file for an Impromptu User, Administrator, or workstation installation. When an Impromptu state file location is specified, Impromptu searches for the Impromptu.ini file in the state file location rather than in the default location. If the Impromptu.ini file does not exist in this location, it is created. Use an Impromptu state file location when you want to maintain one Impromptu.ini file for several users. In a workstation installation, the cer*n*.ini file in the shared LAN location must contain the Impromptu state file location. Users specify this location in the Application Destination Folder dialog box during installation. The Impromptu state file location must be the same for each workstation installation.
Example	Impromptu state file location=C:\Program Files\State
To change	Edit the Impromptu state file location entry added to the cer*n*.ini file, where *n* represents the product rendition number.

Related Topics

- "Cern.ini" (p. 138)
- "Configuration Files" (p. 137)

Impromptu.ini

Specifies Impromptu preferences. This file is created or updated when you start Impromptu. Some entries in this file can be updated in Configuration Manager.

Impromptu.ini includes the following preferences:

[Data Attributes]

[Default Directories]

[Startup Options]

[Query Options]

[Object Attributes]

[Styles]

[Graph Default Colors]

[Query Statistics]

[MRU Files]

Note

- If you are distributing reports to users, ensure that the Impromptu.ini settings are consistent for all the users. For example, if you define styles in Impromptu.ini, use those styles in standard reports, and then distribute the reports to users without those styles in their Impromptu.ini files, the reports won't display properly for those users. You must modify their Impromptu.ini files to include the same styles included in your Impromptu.ini file.

Related Topics

- "Configuration Files" (p. 137)

[Data Attributes]

Stores application-wide data format settings. By default, data is formatted using the General option which uses the user's locale settings.

numeric format=<setting>

Default	No default.
Description	Shows the format of numeric data.
To change	From the Tools menu, click Options and then click the Data Format tab.

date format=<setting>

Default	No default.
Description	Shows the format of date data.
To change	From the Tools menu, click Options and then click the Data Format tab.

date time format=<setting>

Default	No default.
Description	Shows the format of date-time data.
To change	From the Tools menu, click Options and then click the Data Format tab.

time format=<setting>

Default	No default.
Description	Shows the format used for time.
To change	From the Tools menu, click Options and then click the Data Format tab.

interval format=<setting>

Default	No default.
Description	Shows the format of intervals.
To change	From the Tools menu, click Options and then click the Data Format tab.

string format=<setting>

Default	No default.

Description	Shows the format of string expressions.
To change	From the Tools menu, click Options and then click the Data Format tab.

[Default Directories]

Defines the default directories for storing and locating the following files:
- Impromptu catalogs
- Impromptu reports
- temporary files (used for sorting and grouping)

temporary data path=<path>

Default	temporary data path=C:\TEMP
Description	Sets where Impromptu creates temporary files.
To change	From the Tools menu, click Options and then click the File Locations tab or edit the parameter in Configuration Manager.

catalog path=<path>

Default	catalog path=C:\Program Files\ Cognos\cer*n*\Samples\Impromptu\Reports
Description	Sets where Impromptu looks for catalogs.
To change	From the Tools menu, click Options and then click the File Locations tab or edit the parameter in Configuration Manager.

report path=<path>

Default	report path=C:\Program Files\ Cognos\cer*n*\Samples\Impromptu\Reports
Description	Sets where Impromptu looks for reports.
To change	From the Tools menu, click Options and then click the File Locations tab or edit the parameter in Configuration Manager.

user template path=<path>

Default	user templates path=C:\Program Files\ Cognos\cer*n*\Samples\Impromptu\Templates
Description	Sets the location of user template files. User template files provide users with consistent access to templates across the entire application.
To change	From the Tools menu, click Options and then click the File Locations tab or edit the parameter in Configuration Manager.

workgroup templates path=<path>

Default	workgroup templates path=C:\Program Files\Cognos\cer*n*\Samples\Impromptu\Templates
Description	Sets the location of workgroup templates. Workgroup templates provide uses with consistent access to templates across the entire application.
To change	From the Tools menu, click Options and then click the File Locations tab or edit the parameter in Configuration Manager.

default template=<path>

Default	default template=C:\Program Files\Cognos\cer*n*\Samples\Impromptu\templates\standard\simple list.imt
Description	Sets the location of the default template to use when creating a new report.
To change	From the Tools menu, click Options and then click the File Locations tab or edit the parameter in Configuration Manager.

Related Topics

- "Impromptu.ini" (p. 139)
- "Configuration Files" (p. 137)

[Startup Options]

Sets Impromptu's startup attributes.

show QuickHelp=<setting>

Default	show QuickHelp=1
Description	Sets whether Impromptu shows QuickHelp as the mouse pointer moves over buttons on the toolbars.
To change	From the Tools menu, click Toolbars, and then clear the Show the Toolbar QuickHelp check box.

connect to database=<setting>

Default	connect to database=1
Description	Sets whether Impromptu automatically connects to the database when opening a catalog.
To change	From the Tools menu, click Options, click the Start-up tab, and then clear the Auto Attach to Database When Catalog is Opened check box.

ruler displayed=<setting>

Default	ruler displayed=0
Description	Sets whether to show the ruler.
To change	From the View menu, click Ruler.

last used catalog=<CatalogName>

Default	Determined when a new catalog is opened.
Description	Sets the name of the last catalog opened.
To change	Not applicable. This option resets each time a new catalog is opened.

ruler in centimeters=<n>

Default	ruler in centimeters=1 Ruler displays measurements in centimeters.
Description	Sets whether the rulers displays measurements in centimeters or inches. To display measurements in inches set the value to 0.
To change	Open a report and then under View, click Ruler.

catalog defrag threshold=<n>

Default	catalog defrag threshold=66
Description	Sets a threshold for the percentage of useful information. If a catalog becomes fragmented and falls below this threshold, the catalog defragments when explicitly closed. Click Close from the Catalog menu to explicitly close a catalog. Defragmenting a catalog makes it smaller by removing wasted space in the catalog. Defragmentation does not happen if the catalog is read-only there is insufficient disk space to perform defragmentation
To change	Use a text editor to edit the Impromptu.ini file. You can set the following values: 0 = Do not defragment the catalog. 100 = always defragments the catalog. 66 = value not set.

report defrag threshold=<n>

Default	report defrag threshold=66
Description	Sets a threshold for the percentage of useful information. If a report becomes fragmented and falls below this threshold, the report defragments when file is closed. If you set Report Defrag Threshold to any value other than 0, the value is read as a percentage of the amount of accessible data in the report before the report is defragmented. If the percentage of accessible data falls below the threshold value you set, the report is defragmented and the unused data in the report is removed.
To change	Use a text editor to edit the Impromptu.ini file. You can set the following values: 0 = Do not defragment the reports. 100 = Always defragments the reports. 66 = The default value.

windows maximized=<setting>

Default	window maximized=0
Description	Sets whether Impromptu maximizes on startup.
To change	Maximize the Impromptu window.

window size=<setting>

Default	Determines when the Impromptu window is resized.
Description	Defines the size of the Impromptu window.
Example	window size=0, 0, 1020, 690
To change	Close Impromptu after resizing the Impromptu window.

show invocation dialog=<n>

Default	Show invocation dialog=1
Description	Determines whether to show the Welcome dialog box.
To change	Use the Show this dialog in future check box in the Welcome dialog box or use the Show the Welcome to Impromptu dialog box check box in the Options dialog box.

Always show catalog logon dialog=<setting>

Default	Always show catalog logon dialog=1
Description	Determines whether the Catalog Login dialog box appears when Access Manager can provide all the required logon information.
To change	Use the Always Show this Dialog check box in the Catalog Logon dialog box or the Always Show Catalog Logon Dialog check box in the Options dialog box.

maximize document=<setting>

Default	maximize document=1
Description	Sets whether to show Impromptu reports as maximized.
To change	Maximize or restore a report.

file picklist delimiter=<c>

Default	No default entry. When there is no entry, the value is a , (comma).
Description	Specifies the picklist file separator.
To change	Use a text editor to add and then edit this entry in the Impromptu.ini file.

export HTML metadata=<n>

Default	No default. You must add this entry.
Description	Specifies that HTML metadata is included in a report you save as HTML. The metadata describes report contents and individual values.
To change	Use a text editor to add the following to the Impromptu.ini file: [Startup Options] Export HTML Metadata=1

open lock warning message=<n>

Default	No default. You must add this entry.
Description	Specifies that a warning message doesn't appear when you try to open a report that another user has open or that is read-only.
To change	Use a text editor to add the following to the Impromptu.ini file: [Startup Options] Open Lock Warning Message=0

OverrideDistributed = <n>

Default	No default. You must add this entry.
Description	Specifies that you can continue to use the Tables and Joins commands when you edit personal distributed catalogs. In Impromptu 6.0, these commands are unavailable unless you add this entry. In earlier versions of Impromptu Administrator, when using personal distributed catalogs the Tables and Joins commands (from the Catalog menu) were available. They shouldn't have been available and using them resulted in a loss of information.
To change	Use a text editor to add the following to the Impromptu.ini file: [Startup Options] OverrideDistributed=1

Allow Lazy Path Matching=<setting>

Default	No default. You must add this entry.
Description	Add this setting when you are updating a report with a modified or different catalog than the one it was created with, and you want to enable matching on the first folder item with the same name as the report item. By default, matching on the first folder item is disabled, because if all folder items in the new catalog don't have unique names, then matching on the first folder item can generate SQL queries improperly.
To change	Use a text editor to add the following to the Impromptu.ini file: [Startup Options] Allow Lazy Path Matching=T

Related Topics

- "Impromptu.ini" (p. 139)
- "Configuration Files" (p. 137)

[Query Options]

Sets query options, such as minimum free disk space and the number of rows to bulk fetch. Impromptu can retrieve more than one row of data in a single fetch call. Since none of the entries in this section appear in the Impromptu.ini by default, you may have to add this section before you add one its entries.

minFreeDiskSpace=<n>

Default	No default entry. When there is no entry, the value is 0 (meaning unlimited diskspace).
Description	Sets the size of the internal swap file (in bytes) that Impromptu uses to cache query results. Defaults to unlimited disk space. If you want to reserve free disk space for other applications, set this entry to the desired level, for example, 100000 (approx. 100 KB). When the swap file reaches maximum size, performance may slow down if you scroll repeatedly across a large number of pages in a report.
To change	Use a text editor to edit the Impromptu.ini file.

bulk fetch rows=<n>

Default	No default entry. When there is no entry, the value is 100.
Description	Specifies how many rows Impromptu retrieves in one fetch call if your database supports bulk fetch. **Note:** A limit may have been placed on the number of rows Impromptu can retrieve. If that limit is lower than the bulk fetch rows value, Impromptu uses that limit instead. For more information on limiting the number of rows retrieved, see your Impromptu administrator.
To change	Use a text editor to edit the Impromptu.ini file.

use parameterized query=<n>

Default	No default entry. When there is no entry, the value is 0 (meaning that parameterized queries are not used).
Description	Specifies whether SQL parameters are used for prompt values in query statement. In large queries with prompt values, use parameters in queries to increase performance. To use parameterized queries, add this entry and set the value to 1.
To change	Use a text editor to edit the Impromptu.ini file.

use automatic ORACLE Decode=<n>

Default	No default entry. When there is no entry, the value is 1 (meaning that automatic ORACLE Decode is turned on).
Description	Specifies whether to automatically generate Decode statements when running queries against an ORACLE database. If an Impromptu query contains If statements, then a Case When statement is written into the SQL query for the database. However, ORACLE databases cannot process Case When statements, which must be processed locally. For queries against ORACLE databases, use the automatic ORACLE Decode statements to increase performance. However, if these queries return the wrong results (possibly because of null or floating point numbers), turn off the automatic ORACLE Decode setting by adding this entry and set the value to 0.
To change	Use a text editor to edit the Impromptu.ini file.

generate isnull join=<n>

Default	No default entry. When there is no entry, the value is 1.
Description	Specifies whether isnull joins are created during SQLGroup transformation. To turn off isnull join creation, create this entry and set it equal to 0.
To change	Use a text editor to edit the Impromptu.ini file.

Related Topics

- "Impromptu.ini" (p. 139)
- "Configuration Files" (p. 137)

[Object Attributes]

Sets default formatting attributes, such as patterns or borders, for Impromptu report objects.

<ObjectAttribute>=<setting>, <setting>...

Default	Form Border=1,0,0,0,1,0,0,0,1,0,0,0,1,0,0,0 Report Border=1,0,0,0,1,0,0,0,1,0,0,0,1,0,0,0 List Border=1,0,0,0,1,0,0,0,1,0,0,0,1,0,0,0 Crosstab Border=1,0,0,0,1,0,0,0,1,0,0,0,1,0,0,0 OLE Border=1,0,0,0,1,0,0,0,1,0,0,0,1,0,0,0 Graph Border=1,0,0,0,1,0,0,0,1,0,0,0,1,0,0,0 Bitmap Border=1,0,0,0,1,0,0,0,1,0,0,0,1,0,0,0 ColumnTitle Border=1,0,0,0,1,0,0,0,1,0,0,0,1,0,0,0 Rectangle Border=1,0,0,0,1,0,0,0,1,0,0,0,1,0,0,0 Text Pattern=0,255,255,255,0,0,0 ColumnTitle Pattern=0,255,255,255,0,0,0 Form Pattern=1,255,255,255,0,0,0 Report Pattern=1,255,255,255,0,0,0 List Pattern=0,255,255,255,0,0,0 Rectangle Pattern=0,255,255,255,0,0,0
Description	Sets the default format for Impromptu report objects.
To change	From the Tools menu, click Options and then click the Object Format tab.

Related Topics

- "Impromptu.ini" (p. 139)
- "Configuration Files" (p. 137)

[Styles]

Stores defined style names used in reports and templates.

Note

- If you deploy reports to other users, ensure that the [Styles] section of their Impromptu.ini files contains <Stylename=> entries for the styles used in your reports, and that there is a [Style - <Stylename>] entry for each style defined in the [Styles] section.

<StyleName>=

Default	Light Emboss= Dark Emboss= Column Title Emboss= Light Etch= Dark Etch= Transparent= Heading 1= Heading 2= Heading 3= Heading 4= Heading 5= Poor (Color)= Normal (Color)= Good (Color)= Poor (Mono)= Normal (Mono)= Good (Mono)= Blue Sky 1= Blue Sky 2= Blue Sky 3= Blue Sky 4= Sea Blues 1= Sea Blues 2= Sea Blues 3= Sea Blues 4= Seeing Red 1= Seeing Red 2= Seeing Red 3= Seeing Red 4= Mellow Yellow 1= Mellow Yellow 2= Mellow Yellow 3= Mellow Yellow 4= Grass Green 1= Grass Green 2= Grass Green 3= Grass Green 4=
Description	Stores names of Impromptu report styles.
Example	[Styles] Raised Button= Lowered Button= High Risk=
To change	Add new styles or modify existing ones, use the Styles dialog box. To access the Styles dialog box, with a report open, under the Format menu, click Styles.

Each style listed in the [Styles] section, is followed by a separate [Style - <Stylename>] entry that looks like this:

```
[Style - Light Emboss]
Border=1,255,255,255,1,128,128,128,1,128,128,128,1,255,255,255
Pattern=1,192,192,192,0,0,0
```

The Style entries define borders, a pattern, a font, and a color for each Impromptu default style as well as any styles you have defined.

Related Topics

- "Impromptu.ini" (p. 139)
- "Configuration Files" (p. 137)

[Graph Default Colors]

Specifies the default colors for color palettes and patterns.

<ObjectAttribute>=<setting>, <setting>...

Default	Custom Colors=65793,8388608,32768,8421376, 128,8388736,32896,12632256,8421504,16711680,65280, 16776960,255,16711935,65535,16777215 Custom Pattern IDs=1,2,3,4,5,6,7,8,9,10,11, 12,13,14,15,16
Description	Specifies the default colors for color palettes and patterns.

Related Topics

- "Cern.ini" (p. 138)
- "Configuration Files" (p. 137)

[Query Statistics]

Stores statistics for Impromptu queries.

<ReportName> = <statistic>, <statistic>...

Default	Created or updated automatically when a report is run.
Description	Stores statistical information about Impromptu queries. Impromptu uses the entries in the Query Statistics section to provide query feedback. This information is shown in the Profile tab (Query dialog box) as the average number of seconds to execute the query and the average number of rows the query returns. Impromptu updates the Query Statistic entry each time a report is run, resulting in increasingly accurate statistics as reports are used.
Example	C:\Program Files\Cognos\cer3\Samples\Impromptu\Reports\Ppview.imr=793994733,0, 0.000000,0.000000,2,54.000000,1458.000000
To change	Do not change these entries. If you delete this information, you will lose the query performance information shown in the Profile tab (Query dialog box). **Note:** Impromptu automatically deletes these entries based on file existence. If a query statistics entry is more than 60 days old, Impromptu checks for the existence of the file containing the associated report. If the file no longer exists, Impromptu deletes the Query Statistic entry.

Related Topics

- "Impromptu.ini" (p. 139)
- "Configuration Files" (p. 137)

[MRU Files]

Stores a list of the most recently used reports and templates.

MRUF<n>=FileName

Default	Not applicable. Determined when you work with reports and templates.
Description	Stores the names of the most recently used reports and templates. Impromptu shows the names in the recent file list in the File menu.
Example	[MRU Files] MRUF1=C:\Program Files\Cognos\cer3\Samples\Impromptu\Reports\Report1.imr MRUF12=C:\Program Files\Cognos\cer3\Samples\Impromptu\Reports\Xform01.imr
To change	Changes when you work with a new report or template.

Related Topics

- "Impromptu.ini" (p. 139)
- "Configuration Files" (p. 137)

Use Type Libraries

Description

Type libraries contain the available components of the OLE automation server, including information about those components and how to use them. The type library can show

- arguments and return types of the methods
- properties for objects defined by the server application
- definitions for custom data types such as enumerations, unions, data structures, and non-interface functions that can be called from a .dll
- be used with C++

If you use macros for Impromptu, you can use the type library file, ImpClient.tlb, that comes with Impromptu.

ImpClient.tlb contains information about automation objects and collections, along with their properties and methods. Instead of using the Cognos Script Editor, you can use the information in ImpClient.tlb to build macro scripts in Visual Basic or create header files and implementation files in Visual C++.

You can also use other applications, such as, Word or Excel, to open the type library (through a Visual Basic-compatible editor).

Notes

- The use of the Impromptu type library with Visual Basic is not supported.
- Type libraries and OLE automation only work in Windows deployment environments. They do not work in other environments, such as, UNIX.

Steps

1. Open Developer's Studio.
2. Open a project.
3. From the View menu, click Class Wizard.
4. Click Add Class and then click From a Type Library.
5. Select ImpClient.tlb.

6. In the Confirm Classes box, click the classes you want and click OK.
7. In the Workspace, click Class View to show the selected classes and their objects.
   Note: Only methods are shown for objects, not properties.
8. In the Workspace, click File Viewer to view the object definitions in the ImpClient.h file.
   You can now create objects in implementation files (*.cpp).
9. Use both types of files in the application you are writing or editing.

Note

- Always refer to the Macro online help if there is a discrepancy in object and collection names.

Chapter 24: Get Help on Basic and Advanced Topics

This Help File

The Impromptu online Help is structured to meet the needs of its primary audiences: the report viewer and report creator.

- Report viewers view, print, or export information found in existing reports.
- Report creators create reports using the Report Wizard or a template, and apply essential skills, such as sorting, grouping, formatting, and basic filtering.

All the information needed to perform essential tasks in Impromptu is in the online Help.

Mastering Impromptu Reports

If you are an advanced report author (you create complex reports for others), see the topic in the *Mastering Impromptu Reports* online help file that is provided with Impromptu.

Comprehensive Index

A comprehensive index for the online Help contains keywords for topics within both the online Help files.

Chapter 25: Troubleshooting

For information about errors during the installation, see the readme file. The following error messages may be resolved by following the suggestions in the solution section.

Problem	Description
Cannot Access the Datasource	Occurs when you attempt to open a catalog or when you connect to the database through Impromptu.
Cannot Open a Catalog Created with Architect	Occurs when you attempt to open a catalog created with Architect.
Cannot Open a Catalog with the Current User Class or Version of Impromptu	Occurs when you attempt to open a catalog using the User version of Impromptu or if your User Class does not exist in the catalog security.
Cannot Connect to the SQLServer Database	Occurs when you attempt to connect to a catalog or an SQLServer database.
Cannot Connect to the MS SQL Server	Occurs when you attempt to connect to a MS SQL Server.
Cannot Find the Report or One of Its Components	Occurs when you attempt to open a report by double-clicking on the file within Windows Explorer.
Unable to Connect to the Database	Occurs when you attempt to execute a report or query immediately after installing and setting up a connection to DB2, Sybase Adaptive Server Enterprise, or Teradata

Cannot Access the Datasource

Error Message

DMS-E-DBACCESS, It was not possible to access <logical database name> database.

[Microsoft][ODBC DLL] datasource name not found and no default driver specified.

Information

Occurs when you attempt to open a catalog or when you connect to the database using Impromptu. Impromptu cannot open the target datasource.

Solution

Check the following information

- That the ODBC driver has been installed and configured correctly through the Microsoft ODBC Administrator. Verify that the entry for your data source is in the Odbc.ini file.
- That the Impromptu logical database definition is correct, confirm that the correct ODBC data source is specified. Check that the database definition is in the [Databases] section of the Cognos.ini.
- That you are using a 32-bit ODBC driver.
- That you have the latest version of the ODBC driver, including all available patches.
- That the Odbc.dll and Odbcint.dll are version 2.10 or later.
- That the AS/400 ptf must be sf34548, if you are using IBM's Client Access.

- That you verify the path with the SQL Lib IBM ACE.
- Run an ODBC Trace to help identify the problem.
- Compare the ODBC driver settings with a successful connection from another PC.

If the above is verified, then the database definition for this catalog may be incorrect. Try creating a database definition.

Steps

1. From the Impromptu **Help** menu, select **Contents and Index**.
2. In the **Help Topics** dialog box, select the Contents tab and double click Database Definition Manager.
3. Double click Setup Up Database Access and double click **Create a Database Definition**.

Note: This topic is available only in the Impromptu Administrator online help.

Cannot Open a Catalog Created with Architect

Error Message

The catalog's available user classes do no correspond to any defined by the Common Logon Server.

Information

This error occurs when you attempt to open a catalog created with Architect. The catalog contains security information stored as authentication data in Access Manager. The current user ID does not have permission to access the data in the catalog.

Solution

You must log on to this catalog as the Creator.

Steps

1. In Access Manager, add a user class called Creator and associate the user logging on to the Common Logon Server, to it.
2. Shut down the Common Logon Server and reconnect to the catalog.
3. Use the Creator **User Class** at the Catalog Logon dialog box.

Note: By default every catalog has a Creator **User Class**.

Cannot Open a Catalog with Current User Class or Version of Impromptu

Error Message

Catalog has no User Class that is valid with this edition. Contact the catalog administrator.

Or when using the Impromptu User edition.

Cannot open a catalog nor query a report, because an Impromptu warning message is displayed: Catalog has no user class that is valid with this edition. Contact the catalog administrator.

Information

This error occurs when you attempt to open a catalog using the User version of Impromptu or if your User Class does not exist in the catalog security.

Solution

The current user ID does not have permission to access the data in this catalog with the User version of Impromptu. Either the current user class does not exist in the catalog or there are no user classes defined in the catalog. An Impromptu administrator must create and define additional user classes for this catalog. For information about creating user classes, see the Impromptu Administrator online help or the Impromptu *Administration Guide*.

If setting the user classes in the catalog does not fix the problem, than ensure that the report has the correct path to a valid catalog which has user classes defined in its User Profiles:

1. Open the report.
2. From the Report menu, click General and review the Catalog path. If necessary, click Browse to find the correct catalog location and file.
3. Upgrade the catalog and all reports to the same version of Impromptu. You should also synchronize the versions between the Administrator and User editions.

Note: The above suggestions do not apply if the catalog was created using Architect.

Cannot Connect to the SQL Server Database

Error Message

Error 53 dms-e-yv_systemerr, an unexpected Windows error (1157) occurred while attempting to load the gateway.

Information

This error occurs when you try to connect to a catalog or a SQLServer database.

Note: If you are using Windows authentication for SQL Server login you can connect to SQL Server without logging in again.

Solution

Check the following information

- The 32-bit MS SQL client software is properly installed and configured on your PC.
- The Path environment variable contains the path to the \MSSQL\bin directory
- You can successfully connect to the database outside Impromptu.
- The files Dbnmpntw.dll and Ntwdblib.dll are in the \MSSQL\bin and \WinNT\System32 directories.

Cannot Connect to the MS SQL Server

Error Message

Unexpected Windows error (1157) occurred while attempting to load the gateway 'msdbak.dll'.

Information

This error occurs when you attempt to connect to a MicroSoft SQL Server. The MS SQL Server Client software does not appear to be installed or is not properly configured.

Solution

If the MS SQL Sever Client software appears to be configured properly, than verify that the following DLLs exist under <drive>:\MSSQLl\bin directory

- Dbnmpntw.dll
- Ntwdblib.dll

If you have a server without SQL Server or SQL Enterprise Manager, you must verify that these DLLs also exist under <drive>:\WinNT.

If the MS SQL Sever Client software does not appear to be configured properly, install or reinstall the MS SQL Server Client software.

Cannot Find the Report or One of Its Components

Error Message

Cannot find the file'<path>\<report>.imr' or one of its components.

Information

This error occurs when you attempt to open a report by double-clicking on the file within Windows Explorer.

The Impromptu report does not have a valid application associated with it.

Solution

Impromptu must be identified as the associated application. To do this

1. In Windows Explorer, highlight the .imr file by selecting it.
2. Hold the shift key down, right click the .imr file and select Open With.
3. In the Open With dialog box navigate to either ImpAdmin, if the Administrator version is installed, or ImpUser, if the User version is installed.
4. Select the Always use this program to open this type of file check box.
5. Click OK.

Unable to Connect to the Database

Error Message

Unable to connect to database.

Information

When you try to execute reports or queries immediately after installing and setting up a connection to DB2, Sybase Adaptive Server Enterprise, or Teradata, you may receive an error message that there is a problem connecting to the database or executing the report.

Solution

You must reboot your system to solve this problem.

Chapter 26: Impromptu Chart Changes

Formatting charts in the Impromptu Series 7 Version 4 release has changed significantly from the last release. Powerful new dialogs have been introduced that offer more functionality. So, moving to the latest version of Impromptu means that you will not lose any functionality that you had in previous versions. However, it does mean that you will do certain tasks differently in the new environment. To identify the changes related to formatting charting, see the following topics:

- chart types
- chart properties
- titles
- legends
- data properties
- grids, scales and axis labels

Chart Types

See the following table to compare how you add and change the chart type in Impromptu Series 7 Version 3 and Series 7 Version 4.

Goal	Series 7 Version 3	Series 7 Version 4
Add a 2D bar chart	In the **Chart Properties** dialog, in the **Chart type** list, click **2D Bar.**	In the **Chart Properties** dialog box, in the **Chart type** list, click **Bar.** On the **Format** tab, click **Properties**, and then on the **General** tab, un-check the **Depth** check box (no Depth).
Add a 3D bar chart. **Note:** This 3D bar chart is not a true three-dimensional chart. It is a 2D bar chart with depth.	In the **Chart Properties** dialog, in the **Chart type** list, click **3D Bar.**	In the **Chart Properties** dialog box, in the **Chart type** list, click **Bar.** On the **Format** tab, click **Properties**, and then on the **General** tab, specify **Depth**.
Add a pie chart.	In the **Chart Properties** dialog, in the **Chart type** list, click either **2D Pie** or **3D Pie.**	In the **Chart Properties** dialog box, in the **Chart type** list, click **Pie.**
Add a 2D pie chart.	In the **Chart Properties** dialog, in the **Chart type** list, click **2D Pie.**	In the **Chart Properties** dialog box, in the **Chart type** list, click **Pie.** On the **Layout** tab, click **2D Circular Pie.**
Add a 3D pie chart.	In the **Chart Properties** dialog, in the **Chart type** list, click **3D Pie.**	In the **Chart Properties** dialog box, in the **Chart type** list, click **Pie.** On the **Format** tab, click **Properties**, and then on the **General** tab, specify **Depth**.

Goal	Series 7 Version 3	Series 7 Version 4
Add a 2D area chart.	In the **Chart Properties** dialog, in the **Chart type** list, click **2D Area**.	In the **Chart Properties** dialog box, in the **Chart type** list, click **Area**. Click the **Format** tab, click **Properties**, and on the **General** tab, un-check the **Depth** check box (no Depth).
Add a 3D area chart. **Note:** This 3D area chart is not a true three-dimensional chart. It is a 2D area chart with depth.	In the **Chart Properties** dialog, in the **Chart type** list, click **3D Area.**	In the **Chart Properties** dialog box, in the **Chart type** list, click **Area**. Click the **Format** tab, click **Properties**, and on the **General** tab, specify **Depth**.
Add a line chart.	In the **Chart Properties** dialog, in the **Chart type** list, click **Line**.	In the **Chart Properties** dialog box, in the **Chart type** list, click **Line**. Click the **Format** tab, click **Properties**, and on the **General** tab, un-check the **Depth** check box.
Add a 2D line.	In the **Chart Properties** dialog, in the **Chart type** list, click **Tape**.	In the **Chart Properties** dialog box, in the **Chart type** list, click **Line**. Click the **Format** tab, click **Properties**, and on the **General** tab, specify **Depth**.
Add a log chart.	In the **Chart Properties** dialog, in the **Chart type** list, click **Log**.	In the **Chart Properties** dialog box, in the **Chart type** list, click **Line**. Click the **Format** tab, click **Grids and Scales**, and then on the **Scales** tab, click **Make Logarithmic**.
Add a tape chart.	In the **Chart Properties** dialog, in the **Chart type** list, click **Tape**.	In the **Chart Properties** dialog box, in the **Chart type** list, click **Line**. Click the **Format** tab, click **Properties**, and on the **General** tab, specify **Depth**.

Other Chart Properties

See the following table to compare how you change certain other chart properties in Impromptu Series 7 Version 3 and Series 7 Version 4.

Goal	Series 7 Version 3	Series 7 Version 4
Change chart background, plot and legend color.	On the **Format** tab, in the **Select** box, click the chart. Under the **Background color** option, click **Customize.** The color you specify applies to the chart, plot and legend areas.	On the **Format** tab, in the **Chart background** box, click the area of the chart to format: chart, plot or legend. Click **Edit** and use the **Formatting** dialog box to format the color.
Show chart values as a percent.	On the **Format** tab, click **Percent**.	On the **Format** tab, click **Properties**. On the **Layout** tab, click **Percent**.

Goal	Series 7 Version 3	Series 7 Version 4
Swap the chart axes.	On the **Format** tab, click **Swap**.	On the **Format** tab, click **Properties**. On the **Layout** tab, select the **Horizontal** check box.
For pie chart, specify a pullout slice.	On the **Format** tab, in the **Select** box, click the chart. Click **Show pullout slice**. Use the dropdown list to specify the data item to pull out.	On the **Format** tab, click **Properties**, and on the **General** tab, specify an **Explode** value. This value is applied to each piece of the pie. To customize the **Explode** value for a particular slice, on the **Format** tab, click **Customize per Data Item**.

Titles

See the following table to compare how you change chart titles in Impromptu Series 7 Version 3 and Series 7 Version 4.

Goal	Series 7 Version 3	Series 7 Version 4
Add a chart title.	In the **Chart Properties** dialog box, on the **Format** tab, click **Chart Title**.	In the **Chart Properties** dialog box, click the **Format** tab, and then click **Titles**. Click the **Title** check box and type a title.
Add a primary or x-axis title.	On the **Format** tab, click the primary or x-axis **Title**.	In the **Chart Properties** dialog box, click the **Format** tab, and then click **Titles**. Click the **Category Title** check box and type a x-axis title.
Add a secondary or y-axis title.	On the **Format** tab, click the secondary or y-axis **Title**.	In the **Chart Properties** dialog box, click the **Format** tab, and then click **Titles**. Click the **Value Title (Y1)** check box and type a y-axis title.
Format a title.	On the **Format** tab, in the **Select** box, click the chart or axis title, then click **Font**. Use the **Chart Font** dialog box to format the title.	In the **Chart Properties** dialog box, on the **Format** tab, use the **Font formatting** list box to select the title, then click **Edit**.

Legends

See the following table to compare how you add and format a legend in Impromptu Series 7 Version 3 and Series 7 Version 4.

Goal	Series 7 Version 3	Series 7 Version 4
Add a legend.	In the **Chart Properties** dialog box, on the **Format** tab, click **Legend**, and then click **Show the legend**.	In the **Chart Properties** dialog box, on the **Format** tab, click **Properties**. Click the **Look** tab, and select **Show Legend**.

Goal	Series 7 Version 3	Series 7 Version 4
Change legend and legend marker location.	On the **Format** tab, click **Legend**, with **Show the legend** selected, specify the legend location and the location of markers and legend text.	In the **Chart Properties** dialog box, on the **Format** tab, click **Properties**. Click the **Look** tab, select **Show Legend**, and specify the legend options.
Format legend text.	In the **Chart Properties** dialog box, on the **Format** tab, click **Legend**, then click **Font**. Use the **Chart Font** dialog box to format the legend text.	In the **Chart Properties** dialog box, on the **Format** tab, use the **Font formatting** list box to select the title, then click **Edit**.

Data Properties

See the following table to compare how you change data properties in Impromptu Series 7 Version 3 and Series 7 Version 4.

Goal	Series 7 Version 3	Series 7 Version 4
Plot null data.	On the **Format** tab, in the **Null data** box, click **Plot as zero** or **Exclude from chart**. Available only for line charts.	In the **Chart Properties** dialog box, on the **Data** tab, select the **Plot null data** check box. Available only for line and correlation charts.
For bar charts only, change the location of data labels.	On the **Format** tab, in the **Select** box, click the chart. In the **Display options** box, in the **Show Values** box, click where you want the data labels to appear.	In the **Chart Properties** dialog box, on the **Format** tab, click **Properties**. Click the **Data Labels** tab, select **Show Data Labels**, and then specify **Labels Location** and **Label Format**.
Per data item, customize data item color marker style marker size line style	On the **Format** tab, in the **Select** box, click the chart. Click **Customize per Data Item**.	In the **Chart Properties** dialog box, on the **Format** tab, click **Customize per Data Item**.
For the entire chart or series, specify line style, marker style and size. This applies to line, bubble and scatter charts.	On the **Format** tab, click the chart. In the **Display options** box, specify line style, marker style and size.	To format marker shape and size: On the **Format** tab, click **Properties** and use the **General** tab. To format the line style: On the **Format** tab, click **Customize per Data Item** and specify the line style for each data item.

Goal	Series 7 Version 3	Series 7 Version 4
Show data items with color.	On the **Format** tab, click the chart. In the **Display options** box, in the **Data item colors** box, click **Show as colors**. Data items automatically appear in different colors. After you specify color to show, to customize the color of each data item, click **Customize per Data Item**.	On the **Format** tab, click **Customize per Data Item** and the color of a data item. In the **Formatting** dialog, specify a color from the color palette.
Show data items with pattern.	On the **Format** tab, click the chart. In the **Display options** box, in the **Data item colors** box, click **Show as patterns**. After you specify pattern, to customize the pattern for each data item, click **Customize per Data Item**.	On the **Format** tab, click **Customize per Data Item** and in the **Color** column, click the color for a data item. In the **Formatting** dialog box, in the **Fill Options**, click **Pattern**. In the **Choose a Pattern** dialog box, specify the fill pattern, foreground and background color.

Grids, Scales and Axis Labels

See the following table to compare how you add and format grids and scales in Impromptu Series 7 Version 3 and Series 7 Version 4.

Goal	Series 7 Version 3	Series 7 Version 4
Add gridlines.	On the **Format** tab, in the **Select** box, click the chart. Select the **Primary gridline** check box to gridlines to the x-axis. Select the **Secondary gridline** check box to add gridlines to the y-axis.	On the **Format** tab, click **Grids and Scales**. Click the axis tab, and then click the **Grids** tab. You can specify gridlines, grid style and grid spacing for major and minor gridlines.
Add and format x-axis labels.	On the **Format** tab, in the **Select** box, click the **Labels** button for the x-axis. Select **Show the labels** check box to add the axis labels. Click **Font** to format the labels.	To add labels: On the **Format** tab, click **Grids and Scales**. Click the **Category Axis**, and use the **Labels** tab and **General** tab to add labels and specify how they display. To format labels: On the **Format** tab, in the **Font formatting** list, click the axis you want to format, for example, **Category** axis, and then click **Edit**.
Wrap x-axis labels.	On the **Format** tab, in the **Select** box, click the **Labels** button for the x-axis. Select **Show the labels** check box to add the axis labels. Click **Word wrap** to wrap labels.	Word wrap text: You cannot specify word wrap explicitly. Text is wrapped automatically. For information on formatting x-axis labels, see "Add and format x-axis labels".

Goal	Series 7 Version 3	Series 7 Version 4
Truncated x-axis labels.	On the **Format** tab, in the **Select** box, click the **Labels** button for the x-axis. Select **Show the labels** check box to add the axis labels. Click **Truncate** to truncate labels.	Truncate text: You cannot specify that text be truncated explicitly. It is truncated automatically. For information on formatting x-axis labels, see "Add and format x-axis labels".
Add and format y-axis labels.	On the **Format** tab, in the **Select** box, click the **Labels** button for the y-axis. Select the **Show labels** check box to add the axis labels. Select **Customize the scale** and then edit the **Minimum**, **Maximum** and **Number of steps** boxes to customize the labels.	To add labels: On the **Format** tab, click **Grids and Scales**. Click the a y-axis tab, and use the **Labels** tab and **General** tab to add labels and specify how they display.

Chapter 27: Impromptu Chart Controls

Impromptu provides several dialog boxes that you can use to format charts. These include the Properties, Titles, Trendlines, Grids and Scales, Customize per Data Item, and Formatting dialog boxes. To assist you with chart formatting, you can find a list of controls for the following dialog boxes, together with a description of each control and the chart types that use them. The dialog boxes are listed alphabetically.

For information about chart-related tasks, see (p. 105).

For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159).

Formatting Dialog Box Controls

Here is a list of the controls in the Formatting dialog box. Not all the controls apply to every chart type or chart configuration. If a control does not apply, either the control does not appear in the dialog box, or it appears but is unavailable.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159).

Font tab

Specifies font characteristics for certain chart objects, such as chart titles, axes titles, data labels, and legend text. Here are an alphabetical list of the controls you find on the Font tab.

Name	Description
Alignment list box	Specifies the text alignment. You can align text left, right, or have it centered.
Color palette	Specifies font color.
Font list box	Specifies the font type.
Rotation list box	Rotates text. Rotating text can help avoid overlapping text, for example, in axis labels.
Size list box	Specifies the font size.
Style buttons	Specifies the font style: italic, bold, and underline.
Transparent button	Makes text transparent.

Line tab

Specifies line characteristics, such as line color, style, and thickness.

Name	Description
Color palette	Specifies font color.
Style list box	Specifies the line style.
Thickness list box	Specifies the line width.
Transparent button	Makes text transparent.

Fill tab

Specifies fill characteristics, such as fill color, fill pattern, and fill pattern color.

Name	Description
Color palette	Specifies font color.
Pattern button	Opens the Choose a Pattern dialog box that lets you specify fill pattern, pattern background and foreground color.
Transparent button	Makes text transparent.

Grids and Scales Dialog Box Controls

Use the Grids and Scales dialog box controls to add axis labels, scales and grids to your charts.

The tabs on the left-side of the dialog box show the available axes in the chart: Y1 Axis, Y2 Axis (for dual-axes charts), Category Axis, X Axis (for bubble and scatter charts) and Series Axis (for three-dimensional charts). When you select an axis tab, the tabs for formatting appear at the top of the dialog box. Not all of the controls apply to every chart type or chart configuration. If a control does not apply, either the control does not appear in the dialog box, or it appears but is unavailable.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159)

General tab

Here is an alphabetical list of controls in the General tab.

Name	Description	Axis	Chart Type
Draw Categories in Reverse Order check box	Reverses the categories plotted on the chart Category Axis. The Category Axis labels appear from left-to-right at the bottom of the chart.	Category Axis, X Axis	area, bar, correlation, gantt, HLCO, HLO, line, radar
Draw Series in Reverse Order check box	Reverses the data plotted on the Series Axis. The Series Axis is only valid for three-dimensional charts.	Series Axis	area, bar, line

Name	Description	Axis	Chart Type
Labels on Both Sides radio button	Specifies the location for the Category or X Axis baseline and labels. The default category axis baseline and labels appear at the bottom of the chart.	Y1 Axis Category Axis X Axis	Y1 Axis: area, bar, bubble, correlation, HLCO, HLO, line, radar, scatter Category Axis: gantt
Labels on Bottom radio button	Specifies the location for the Category or X Axis baseline and labels. The default category axis baseline and labels appear at the bottom of the chart.	Category Axis, X Axis	area, bar, bubble, correlation, HLCO, HLO, line, radar, scatter
Labels on Left radio button	For the Y1 Axis, specifies that labels appear on the left side of the axis.	Y1 Axis, Category Axis	Y1 Axis: area, bar, bubble, correlation, HLCO, HLO, line, radar, scatter Category Axis: gantt
Labels on Right radio button	For the Y1 Axis, specifies that labels appear on the right side of the axis.	Y1 Axis, Category Axis	Y1 Axis: area, bar, bubble, correlation, HLCO, HLO, line, radar, scatter Category Axis: gantt
Labels on Top radio button	Specifies the location for the Category or X Axis baseline and labels. The default Category Axis baseline and labels appear at the bottom of the chart.	Category Axis, X Axis	area, bar, bubble, correlation, HLCO, HLO, line, radar, scatter
Make this a Descending Axis check box	Draws the numeric axis in descending order for the X Axis value labels and columns.	Y1 Axis X Axis	Y1 Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar, scatter X Axis: scatter
Show the Axis Line on the Chart	Shows or hides the category or Y axis base lines. This option is always enabled.	Category Axis	correlation
Value Axis Crosses Between Categories	When selected, offsets the area from the plot edges so that there are gaps between the Y Axis and the start of the plot area values. When cleared, the categories are aligned flush to the plot area edge.	Category Axis, X Axis	area, line

Scales tab

Here is an alphabetical list of controls in the Scales tab.

Name	Description	Axis	Chart Type
Make Logarithmic check box	Specifies a logarithmic scale. To set the logarithmic scale, you must choose manual scaling and set the minimum and maximum value to a value greater than zero.	Y1 Axis X Axis Z Axis	Y1 Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar X Axis: bubble Z Axis: bubble
Always Include Zero check box	Specifies whether to include a zero on the numeric axis. This option is disabled when the Set Minimum Value option is selected.	Y1 Axis X Axis Z Axis	Y1 Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar X Axis: bubble Z Axis: bubble
Set Maximum Value check box	Applies manual scaling on the axis. This allows you to specify a range of values that is different from the range specified in the data. The value you enter sets the maximum value that appears on the numeric axis. The value label and chart columns are adjusted to align with this value.	Y1 Axis X Axis Z Axis	Y1 Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar X Axis: bubble Z Axis: bubble
Set Minimum Value check box	Applies manual scaling on the axis. This allows you to specify a range of values that is different from the range specified in the data. The value you enter sets the minimum value that appears on the axis. The value label and chart columns are adjusted to align with this value.	Y1 Axis X Axis Z Axis	Y1 Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar X Axis: bubble Z Axis: bubble

Labels tab

Here is an alphabetical list of controls in the Labels tab.

Name	Description	Axis	Chart Type
Automatic radio button	Draws all labels on the axis. This option is available for the Category and Series axes.	Category Axis Series Axis	Category Axis: area, bar, bubble, correlation, HLCO, HLO, line, radar Series Axis: area, bar, line
Hide labels for: Maximum Value check box	Shows or hides the maximum value on an axis.	Y1 Axis Y2 Axis X Axis	Y1 Axis: area, bar, bubble, correlation, HLCO, HLO, line, radar, scatter Y2 Axis: area, bar, correlation, line X Axis: bubble, scatter
Hide labels for: Minimum Value check box	Show s or hides the minimum value on an axis.	Y1 Axis Y2 Axis	Y1 Axis: area, bar, bubble, correlation, HLCO, HLO, line, radar, scatter Y2 Axis: area, bar, correlation, line, X Axis: bubble, scatter
Number of categories between labels radio button	Controls the number of labels that appear on the axis by specifying the number of labels that can be dropped between categories. By default, all labels appear. To restrict the number of labels, you must select the Show Labels with this Axis check box.	Category Axis	area, bar, bubble, correlation, HLCO, HLO, line, radar

Name	Description	Axis	Chart Type
Show Labels for this Axis check box	Shows or hides numeric and Category Axis labels. On the numeric axis, labels identify the range of data values that are charted. On the category axis, the labels show how data in the chart is grouped or categorized. When the check box is selected for the category axis, the axis labels appear immediately below the chart frame. For numeric axis labels, when the columns appear vertically from top-to-bottom or bottom-to-top, the labels on the Y1 Axis appear on the left side of the chart. For the Y2 Axis, the labels appear on the right side of a vertical chart and on the top for a horizontal chart. For 3D charts, the category labels appear on the lower right side of the chart.	Y1 Axis Y2 Axis Category Axis X Axis Series Axis	Y1 Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar, scatter Y2 Axis: area, bar, correlation, line Category Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar X Axis: bubble, scatter Series Axis: area, bar, line
Stagger Labels radio button	Staggers Category Axis labels. Staggering labels is useful when long labels are required for each data group but you do not want the labels to wrap. By default, labels on the Category Axis appear on a single line. If labels are too long to fit on a single line, labels are wrapped at word breaks and appear on multiple lines. This option is not available for 3D charts.	Category Axis X Axis	Category Axis: area, bar, correlation, HLCO, HLO, line, radar X Axis: bubble
Use Manual Number of Series radio button	Allows you to manually specify the number of data series plotted in the chart.	Series Axis	area, bar, line

Grids tab

Here is an alphabetical list of controls in the Grids tab.

Name	Description	Axis	Chart Type
Draw Custom Line at check box	Draws a custom grid line on the Y1 Axis or Y2 Axis in your chart. The location of the grid line is specified by the value you enter in the Draw Custom Line at edit box.	Y1 Axis Y2 Axis X Axis	Y1 Axis: area, bar, correlation, HLCO, HLO, line, scatter Y2 Axis: area, bar, correlation, line X Axis: scatter

Name	Description	Axis	Chart Type
Grid Style list	Specifies the style of grid line for major and minor grid lines. You can specify the following styles: Regular Grids Grids and Ticks Inner Ticks Outer Ticks Spanning Ticks To format the width and color of a grid line, use the Formatting option on the Chart Properties, Format tab.	Y1 Axis Y2 Axis Category Axis	Y1 Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar, scatter Y2 Axis: area, bar, correlation, line Category Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line
Gridlines per interval box, Minor Gridlines tab	Controls the number of minor grid lines in the chart.	Y1 Axis Y2 Axis	Y1 Axis: correlation, gantt, radar Y2 Axis: correlation
Set manual number of categories between gridlines radio button Minor Gridlines tab	For minor grid lines on the Category Axis, specifies the number of categories between the grid lines.	Category Axis	area, bar, bubble, correlation, gantt, HLCO, HLO, line
Show Gridlines check box	Shows or hides major grid lines in a chart. To specify a grid line style, see the Grid Style option.	Y1 Axis Y2 Axis Category Axis Series Axis	Y1 Axis: area, bar, gantt, correlation, HLCO, HLO, line, radar, scatter Y2 Axis: area, bar, correlation, line Category Axis: area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar Series Axis: area, bar, line

Name	Description	Axis	Chart Type
Use manual grid interval value check box	For major grid lines, let's you set the grid interval value manually.	Y1 Axis Y2 Axis X Axis	Y1 Axis: area, bar, correlation, gantt, HLCO, HLO, line, radar, scatter Y2 Axis: area, bar, correlation, gantt, line X Axis: scatter

Properties Dialog Box Controls

Use the Properties dialog box controls to format chart characteristics that apply to the chart globally, such as the layout type, data labels, and legend.

Here is a list of the controls in the dialog box, grouped by tab. Not all of the controls apply to every chart type or chart configuration. If a control does not apply, either the control does not appear in the dialog box, or it appears but is unavailable.

General tab

This tab specifies the general properties of a chart, which vary depending on the chart type. For example, you can specify tilt, depth, rotation and explode values for a pie chart. For the columns in a bar chart, you can specify shape, overlap, gap width between columns, and depth.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159)

Here is an alphabetical list of the controls in the General tab.

Name	Description	Chart Type
Bubble size slider	Specifies the size of the markers in a bubble chart.	bubble
Connect Data Points with Lines check box	Shows or hides a connecting line between each marker in a series.	scatter
Depth check box	Controls whether depth is added to a chart. When cleared, the chart is flat. By default, all charts appear with depth added to the chart frame and columns. This option is not available for bar charts with the True 3D layout.	area, bar, correlation, gantt, line
Depth slider	Specifies the amount of depth to be applied to the chart. For a pie chart it controls the thickness of the pie. For the remaining charts, it controls the depth of the bars risers and frame. This option is not available for bar charts with the True 3D layout.	area, bar, bubble, correlation, gantt, line, pie
Direction slider	Specifies the direction in which the depth is applied. This option is not available for bar charts with the True 3D layout.	area, bar, correlation, line

Name	Description	Chart Type
Display Series Lines check box	Draws a line connecting the series data.	stacked bar, percent bar
Explode slider	Detaches all slices from the pie. Exploding a pie or donut chart detaches all slices away from the center.	pie
Gap Width slider	Changes the gap between the group of bars or columns in each category.	bar, correlation, gantt, HLCO, HLO, 3D area, 3D line
Hole Size slider	Controls the size of the hole in a ring pie chart.	ring pie
Keep aspect ratio constant check box	Controls whether a pie chart has to be perfectly circular when drawn. There are cases when a pie chart, with depth and a high Tilt value, looks better with a non 1:1 width: height aspect ratio.	pie
Overlap slider	Changes the degree that bars or columns, within each category, overlap each other. This option is only available for a clustered chart. This option is not available for bar charts that have the True 3D layout.	bar, correlation
Restore All button	Restores all slices of the pie to their original settings when slices have been detached or removed from a pie chart.	pie
Riser Shape list box	Changes the shape of the bars or columns. This field is not available if the Use Depth check box is selected.	bar, correlation, gantt,
Rotation slider	Rotates the pie chart.	pie
Shape list box	Changes the shape of markers. For line and scatter charts, this option is only available if Show Markers is selected.	bubble, line, scatter
Show line(s) check box	Shows or hides the lines in a chart.	line
Show Marker(s) check box	Shows or hides the markers in a chart. For line charts, if this control is enabled, a marker is drawn on each line at locations representing the data values. For a bubble chart, if the user hides markers and does not select Connect Data Points with Lines, the scatter chart does not contain any columns representing the data values.	line, scatter
Size slider	Changes the size of markers. For bubble charts, if zero is used, the markers disappear from the chart. For scatter charts, this option is only available if Show Markers is selected.	bubble, line, scatter

Name	Description	Chart Type
Tilt box	Tilts the pie chart. Lesser values make the pie chart flatter facing the viewer, whereas, the maximum value tilts the pie chart such that only the pie edge is shown.	pie

Layout tab

Changes the default layout. Depending on the chart, you can make the layout type absolute, percent, stacked, clustered, or three-dimensional. You can also specify whether data items appear on the vertical or horizontal axis. For certain charts, you can also specify dual axes.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159)

Here is an alphabetical list of the controls in the Layout tab.

Name	Description	Chart Type
2D Circular Pie check box	Adds depth to a pie chart. The tilt value is set to zero.	pie
Absolute radio button	Specifies that absolute data values are used.	area, bar, line
Angle box slider	Rotates the chart, showing it at different angles.	radar
Area radio button	Shows the area enclosed by the data points.	radar
Circular Data Lines check box	Draws the perimeter of a radar chart which is circular.	radar
Circular Gridlines radio button	Shows circular or value grid lines on a radar chart. You can toggle between circular or spider grid lines. With circular grid lines, you can also specify circular data lines.	radar
Clustered radio button	Creates a side-by-side group of columns. This is the standard type of column or bar chart.	bar
Dual Axes check box	Creates a chart with two numeric axes (Y1 and Y2). To change the data series that are assigned to each axis, use the settings in the Dual Y Options tab. This option is only available for clustered and stacked area charts. It is not available for percent and 3D charts.	area, bar, bubble, line
Horizontal radio button	Plots data columns on the numeric or y-axis.	area, bar, correlation, line
Line radio button	Connects the data points in the chart using lines.	radar
Percent radio button	Creates a column version of a pie chart. Each group calculates the percent of the total required for each series. The axis goes from zero to 100%.	area, bar, line
Pie radio button	Shows data as a percentage of a total.	pie
Ring Pie radio button	Creates a ring variant of the pie chart. The total of all slices is placed in the center.	pie

Name	Description	Chart Type
True 3D radio button	Creates a standard three-dimensional chart that displays a riser for each value in the data set.	area, bar, line
Show Close	Hides or shows the closing value in a HLCO chart.	HLCO
Show Open	Hides or shows the opening value in a HLCO chart.	HLO
Spider Gridlines radio button	Draws the circular or value grid lines such that the radar chart resembles a spider web.	radar
Split check box	Assigns half of the series in the chart to the primary numeric axis (Y1) and the other half to the secondary numeric axis (Y2). It physically splits the chart and shows two separate numeric axes. All columns or bars are drawn from a single category axis base line. The series assigned to the Y1 and Y2 axes are drawn on opposite sides of the chart. If the Dual Axes check box is not selected, this check box is unavailable.	area, bar, line
Stacked check box	Arranges the polygons formed by the data points such that the polygons are stacked one on top of the other.	radar
Stacked radio button	Shows stacked groups of columns or bars. Each stack is comprised of all the series in the group, added up to get a total. The axis is the total value of the cumulative points.	area, bar, line
Style list	Specifies the layout style in high-low-close-open and high-low-close charts. Data values can be represented using rectangular columns or vertical lines.	HLCO, HLO
Vertical radio button	Plots data columns on the category or X-Axis.	area, bar, correlation, line

Data Labels tab

Specifies whether to show data labels. If you choose to have data labels appear, you can specify the label location and format.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159)

Here is an alphabetical list of the controls in the Data Labels tab.

Name	Description	Chart Type
Absolute Values radio button	Shows absolute data values. Available when you select the stacked and percentage chart layout type.	area, bar, line
As Percentage check box	Shows the data values in the chart as a percentage of the total.	pie
Cumulative Values radio button	Shows cumulative data values. Available when you select the stacked and percentage chart layout type.	area, bar, line

Name	Description	Chart Type
Label Format list box	Selects the label format.The user can choose from the following options: Value, Label, or Label & Value. This option is enabled when the Show Data Labels check box is selected. If Value is selected, the data values appear at the corresponding location on each column. If Label is selected, the series labels appear. If Label & Value is selected, the series labels and data values appear. For bubble charts, you can choose an X and Y Value or Label. This selection is not available for scatter charts or charts with the True 3D layout.	area, bar, bubble, correlation, line, HLCO, HLO
Labels Location list box	Selects where the data labels appear next to the associated column or bar in the chart. This option is enabled when the Show Data Labels check box is selected. This option is not available when the True 3D chart layout is selected. The data labels location can be one of the following: Outside Maximum, Inside Maximum, Center, or Base of Chart. For scatter charts, one of the following label locations can be selected: Above Marker, Below Marker, or Centered on Marker.	area, bar, bubble, correlation, gantt, line, HLCO, HLO, scatter
Labels on Sides check box	Shows the series labels on the sides of the chart.	pie
On Slices radio button	Shows the data values on each pie slice. Available if Show Values is selected. Do not select this check box to show the absolute values for each slice.	pie
On Slices radio button	Shows the series labels on each pie slice. Available if Show Labels is selected.	pie
Outside Slices radio button (data values)	Shows the data values outside each pie slice. Available if Show Value is selected.	pie
Outside Slices radio button (series labels)	Shows the series labels outside each pie slice. Available if Show Labels is selected.	pie
Show as Percentage check box	Shows the data values in the chart as a percentage of the total.	area, bar
Show Data Labels check box	Show or hides data labels for all series in the chart.	area, bar, bubble, correlation, gantt, HLCO, HLO, line, radar, scatter
Show Labels check box	Shows or hides the series label associated with each pie slice.	pie

Name	Description	Chart Type
Show Leader Lines check box	Shows or hides the leader lines from each pie slice next to the data value or series label. Available if the Outside Slices option is selected for values or labels.	pie
Show Total radio button	For data values, shows totals when you select the stacked layout type.	area, bar
Show Values check box	Shows or hides data label values for each slice in the pie chart.	pie

Dual Y Options tab

For charts that have dual y-axes, specifies which data series uses the Y1 axis and which data series uses the Y2 axis. This tab is not available for pie, gantt, radar, HLCO, and HLO charts. To add a dual axis to a chart, use the Layout tab.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159)

Here is an alphabetical list of the controls in the Dual Y Options tab.

Name	Description	Chart Type
Y1 Axis list box	Assigns a data series to the Y1 axis. When the Dual Y Options tab is enabled, the data series is divided by two. Half of the series is assigned to the Y1 Axis, and the other half is assigned to the Y2 Axis. The Dual Y Options tab is available only if the Dual Axes check box is selected in the Layout tab.	area, bar, bubble, line
Y2 Axis list box	Assigns a data series to the Y2 Axis. When the Dual Y Options tab is enabled, the data series is divided by two. Half of the series is assigned to the Y1 Axis, and the other half is assigned to the Y2 Axis. The Dual Y Options tab is available only if the Dual Axes check box is selected in the Layout tab.	area, bar, bubble, line
Show Axis Split check box	Show or hides the dual axes split line. Only available when the Dual Axes and Split Dual Axes check boxes are selected in the Layout tab.	area, bar, line
Split Position slider	Selects the location where the chart is split into two halves. Only available when the Dual Axes and Split Dual Axes check boxes are selected in the Layout tab.	area, bar, line

Look tab

Specifies a legend and legend properties for your chart. For example, you can specify where the legend is placed in chart.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159)

Here is an alphabetical list of the controls in the Look tab.

Name	Description	Chart Type
Box Style list box	Draws a text box around the entire legend area. The available options are: No Frame Single Line Frame Double Line Frame Beveled Frame Reverse Beveled Frame	area, bar, bubble, correlation, gantt, HLCO, HLO, line, pie, radar, scatter
Layout list box	Defines where the legend area markers and text appear in the chart. The available options are: Legend on Right Side Legend on Left Side Legend Below Chart	area, bar, bubble, correlation, gantt, HLCO, HLO, line, pie, radar, scatter
Markers and Text list box	Defines the content and format of the legend area. Available only if Show Legend it selected. The following options are available: Markers to Left of Text Markers to Right of Text Text Centered on Markers Markers Above Text Markers Below Text	area, bar, bubble, correlation, gantt, HLCO, HLO, line, pie, radar, scatter
Show Legend check box	Shows or hides the chart legend. If this check box is not selected, all other selections related to the Legend are unavailable.	area, bar, bubble, correlation, gantt, HLCO, HLO, line, pie, radar, scatter

Display Status tab

Use this tab to specify certain display options for pie and radar charts and charts with a three-dimensional layout.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159)

Here is an alphabetical list of the controls in the Display Status tab.

Name	Description	Chart Type
Floor check box	Shows or hides the floor in a three-dimensional chart.	3D area, 3D bar, 3D line
Left Wall check box	Shows or hides the left wall in a three-dimensional chart.	3D area, 3D bar, 3D line
Pie Name check box	Shows or hides the pie name, which is the category label. The category label appears below the pie chart.	pie
Pie Total check box	Shows or hides the total value in the center of each pie. Available only for ring pie charts.	pie
Right Wall check box	Shows or hides the labels for the right wall in a three-dimensional chart.	3D area, 3D bar, 3D line
Show Y-Axis Values on the left check box	Hides or shows the Y Axis values on the left-side of a radar chart.	radar

Titles Dialog Box Controls

Here is a list of the controls, in alphabetical order, that you find in the Titles dialog box. Not all the controls apply to every chart type or chart configuration. If a control does not apply, either the control does not appear in the dialog box, or it appears but is unavailable.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159).

Name	Description	Chart
Category Title check box and edit box	Defines a title for the Category Axis.	area, bar, gantt, HLCO, HLO, line, radar,
Footnote check box and edit box	Defines a footnote. By default, the footnote is placed at the bottom right corner of the chart.	area, bar, bubble, gantt, HLCO, HLO, line, pie, radar, scatter
Subtitle check box and edit box	Defines a subtitle that allows you to provide additional information about the chart. By default, the subtitle is placed at the top center of the chart directly below the chart title.	area, bar, bubble, gantt, HLCO, HLO, line, pie, radar, scatter
Title check box and edit box	Defines the main chart title. By default, the chart title is placed at the top of the chart.	area, bar, bubble, gantt, HLCO, HLO, line, pie, radar, scatter
Value Title (Y1) check box and edit box	Adds a title to the Y1 Axis.	area, bar, bubble, gantt, HLCO, HLO, line, pie, radar, scatter
Value Title (Y2) check box and edit box	Adds a title to the Y2 Axis. This title is available for dual-axes charts, where the chart has both a Y1 Axis and a Y2 Axis.	area, bar, bubble, line, scatter
Series Axis check box and edit box	Adds a series axis title to describe the information charted on the Series Axis. This title is only available for three-dimensional charts where the axis labels that are normally displayed in the legend area are plotted along a secondary group axis. In the default configuration, the series labels appear on the lower left side of the three-dimensional cube.	area, bar, line
X-Axis check box and edit box	Adds a title to the X Axis of the chart. Only bubble and scatter charts include an X Axis.	bubble, scatter

Trendlines Dialog Box Controls

Here is a list of the controls, in alphabetical order, that you find in the Trendlines dialog box. Not all of the controls apply to every chart type or chart configuration. If a control does not apply, either the control does not appear in the dialog box, or it appears but is unavailable.

For information about chart-related tasks, see (p. 105). For information about how tasks are done differently in this version of Impromptu compared to earlier releases, see (p. 159).

Name	Description	Chart Type
Order edit box	Specifies the degree of linear regression for the polynomial trendline. Available only for a polynomial trendline. The Order number must be greater than one but no greater than the number of groups in the chart.	area, bar, line, scatter
Period edit box	Specifies the period over which the moving average line should be drawn. Available only for a Moving Average trendline.	area, bar, line, scatter
Regression Type list box	Defines the type of trendline you want to appear. Available only if Show Trendlines is selected. You can choose the following regression types: linear, logarithmic, polynomial, exponential, moving average.	area, bar, line, scatter
Show Coefficient Values check box	Shows or hides the coefficient values that are used for the trendline. Available for linear, logarithmic, polynomial, power, or exponential trendlines.	area, bar, line, scatter
Show Color Same as Series check box	Draws the trendline with the same color as the selected series. This option is selected by default.	area, bar, line, scatter
Show Equation check box	Shows or hides the equation that was used for the trendline. Available for linear, logarithmic, polynomial, power, or exponential trendlines.	area, bar, line, scatter
Show Trendlines list box	Shows or hides a trendline for the selected series.	area, bar, line, scatter

Glossary

aggregate

A calculation involving a summary component and a FOR clause indicating for what group the aggregate is calculated. An aggregate is calculated independently of its position in a report and of its association with a group. You can perform the following aggregates: total, minimum, maximum, average, count, rank, percentile, percentage, running-total, running minimum, running maximum, running average, running count, and standard deviation. Also called a summary.

alias

An alternative label for a table. Create an alias to relate values in a single table by creating a self-join between the table and its alias. For example, you can determine the name of each employee's manager if an employee table contains the employee name, employee number, and manager number. You can also use a filter expression on the alias to create a view of part of the data from the original table; for example, all those employees who report to a particular manager.

annotations

Descriptive information about the contents of your catalogs. You can develop an application that shows the annotations when your users want context-sensitive help about your catalog folders, columns, prompts, filters, and calculations.

Architect model

The information required to author a set of Cognos applications, contained in a single file (.rep). The Architect model describes an enterprise reporting and querying environment that uses one or more metadata sources.

associated data item

A data item linked to the group data item. Associated data items suppress duplicate data values, but do not generate a control break. For example, if Customer Number is the grouped data item, you can repress Customer Name by declaring it as an associated data item. When Customer Number appears in the report, it appears only once for the group. Marking a data item as associated can affect how Impromptu calculates summary values.

auditing

The process of recording performance information and using it to find out how changes to your reporting environment affect performance times. To audit performance in Impromptu use the Audit Configuration and Audit File Processor applications.

automatic association

The group association of a newly created summary. The location of the group where you create the summary determines its automatic association. If you create a summary using the Calculate button in the Data tab (Query dialog box), the summary appears at the bottom of the Group Order box until you run the query. After you run the query, the summary appears under the lowest group in the Group Order box. If you move a summary with automatic association to a new location in the report, it appears under the group representing the new location.

See also summary.

automation

See OLE automation.

bitmap

An image that consists of pixels on the screen and, stored as a collection of bits. Windows bitmaps have the extension .bmp.

BLOB

A Binary Large Object, or large unstructured object stored in the database. A BLOB can be free text, images, digitized images, or audio streams.

boundary line

A line that indicates the extent of a frame as well as names of each report object. You show or hide boundary lines by using the Boundary Line command (View menu).

bulk fetch

Retrieval of more than one row of data from your database in a single fetch call. Bulk fetch can improve processing time for large queries.

cache query

A temporary cache on your personal computer that Impromptu uses to store report results. You set the cache query by clicking Query from the Report menu, and then clicking the Access tab.

calculated data item

A data item that shows the result of an expression that uses stored data. The value recalculates each time a value in the expression changes. For example, you can use the string operator (+) to combine a data item called Firstname with a data item called Lastname to form a calculated data item called Fullname.

cascading prompt

A prompt that uses information from a previous prompt to determine which options to display in a picklist.

catalog

A file (with the extension .cat) that contains all the information necessary for Impromptu to access and retrieve information from a relational database. A catalog does not store data, but it does provide Impromptu with a business view of the data. A catalog also contains information about what database to access, where the database is stored, and how the tables in the catalog are joined.

See also personal catalog, shared catalog, and secured catalog.

catalog condition

An expression that can be used anywhere you need a true-false value. A catalog condition is stored in the catalog. You can use conditions in filters, in conditional formatting, and in calculations. For example, you can use a condition to see data for only your sales region.

catalog prompt

A prompt you store in the catalog that you can re-use in different reports.

category axis

The axis that contains category information, for example, product, customer, cost center, or country.

For most charts, this axis is considered to be the horizontal, or x-axis, of the chart and appears below the chart. In some charts, the category axis can be relocated so that it appears above, to the left, or to the right of the chart (for example, a horizontal bar chart).

In some charts, there may be more than one category axis, such as the x-axis and the y-axis, or the x-axis and the z-axis. This occurs, for example, when a measure, such as revenue, is charted for products per country (say on the x- and y-axis), over time (say on the z-axis).

cell

The intersection of a column and row that contains a single value.

chart frame

A type of frame that provides a visual image of numeric report data. Charts can be formatted in a number of ways, including bar charts, area charts, pie charts, bubble charts, and many other popular formats.

See also child frame, parent frame, primary frame, and report object.

child frame

A frame or report object that is subordinate to a parent frame.

See also primary frame and report object.

CognosScript

A language similar to VISUAL BASIC, that is included with Cognos applications. You can use CognosScript to write macros.

Color Dialog Box

Displays a color palette. Use to apply color to report objects, such as fonts, charts, lines, borders and grids. The display settings on your computer determine the colors available.

column

One kind of information in a list frame, it is a vertical list of data that shares the same definition.

column spacer

Enables you to create an empty space between list frame columns.

comma delimited ASCII file

A text file where each column of data is separated from the next by a comma. All data must use ASCII standard characters.

command line

The characters used to start an application. For example, you enter command line parameters when you start Impromptu by clicking Run from the Start menu and typing a command.

complex join

A complex join uses an expression to join two tables. You must click the Expression option button to create a complex join.

compound join

A compound join is a join containing several columns joining two tables. A compound join can be an equi-join, non-equi-join, outer join, self-join, or complex join.

condition

An expression that can be used anywhere you need a true-false value. A condition can be stored in the catalog. You can use conditions in filters, in conditional formatting, and in calculations. For example, you can use a condition to see only data for your sales region.

See also filter.

conditional format

An instruction to Impromptu to look through data in the selected report objects and format the data that meets predefined conditions. Use this format to identify exceptional data in your report. For example, retail outlets with quarterly revenues greater than $500,000 could be highlighted in green, while retail outlets with quarterly revenues less than $250,000 could be highlighted in red.

control break

The start of a new group of data, which allows operations such as subtotaling.

Creator

The user class who creates a catalog and usually administers it. By default, the creator has no restrictions on using the catalog.

cross-product query

A report that retrieves data from tables that do not have table joins defined for them.

crosstab

Shows summary information from a list report in a compact table of rows and columns. A crosstab shows the value for the combination of each row and column, enabling you to gain a different perspective on the data and see more without the need to scroll.

For example, you can change a list report that has three columns (Product Type, Sales Channel, Total Sale Amount) into a crosstab that has each Product Type as a row, each Sales Channel as a column, and the Total Sale Amount for each combination of Product Type and Sales Channel in the cells.

crosstab detail filter

Use to filter on the detail columns generated in a crosstab report. For example, if you add the Product Type data item to the rows, you can apply a crosstab detail filter to Environmental Line, GO Sport Line, or Outdoor Products.

See also detail filter and crosstab summary filter.

crosstab summary filter

Use to filter on the summary columns generated in a crosstab report. For example, you can filter on the row totals in a crosstab to show only data items with a total product cost that is over 300.

See also summary filter and crosstab detail filter.

custom condition

An expression that has a true-false value that you use when conditionally formatting report data. For example, you can define a condition that highlights sales margins less than 50%.

You create a custom condition in a report.

data item

A column from a database, HotFile table, or a snapshot of a report.

data source

Where Impromptu retrieves information for your query. The data source can be a database, HotFile, snapshot, or thumbnail.

data type

One of six data types in Impromptu: character, date, date-time, numeric, time, and interval.

database

A collection of data related to a particular purpose and organized for ease of reference. Depending on the type of database you are using, a database can contain tables, views, synonyms, and stored procedures.

dataset

An Impromptu report that stores data values you can use when applying a filter. A dataset is dynamic, meaning that when you use a dataset in a filter, the report that stores that dataset is re-run.

date_exp

A date constant, a date data item, or any expression resulting in a date value.

datetime_exp

A date constant, a date data item, or any expression resulting in a datetime value.

detail filter

Limits the data retrieved in a report. A detail filter eliminates data from a report by restricting the data. For example, you could create a detail filter to specify that only sales over $1000 be included in the report. It is the only filter choice if you have not created a summary calculation for a report.

See also summary filter.

Device Independent Bitmap (DIB)

A bitmap that contains a color table describing how the pixel values correspond to RGB color values.

directory server

Specialized databases that store user attributes, object classes and other schema-type information in a hierarchical format.

distributed catalog

A catalog intended for a workgroup or company where several users need to

- create and edit reports
- change the catalog contents

  For example, users can move and rename folders.
- work offline with Impromptu

  For example, users can take their copy of the catalog along on a business trip.

When users open a distributed catalog, Impromptu makes a personal distributed catalog on the user's personal computer. However, Impromptu maintains a link with the master distributed catalog so that if any changes are made to the original, each user's copy is updated automatically.

drill through

An action that enables Impromptu, PowerPlay, and Scenario users to view transaction-level details in an Impromptu report. You can set up a drill through for any cell in Impromptu, any value in PowerPlay, or any node in Scenario's tree view.

dynamo

Formats the result of an SQL query against an ODBC data source. You use a dynamo to generate HTML controls that are placed on a page of a PowerPrompts application. For example, you can create a dynamo that retrieves countries from a data source. The same dynamo may contain different countries, depending on what is contained in the data source or as the data source is updated.

embed

Inserts information created in one application into another application. Once embedded the information, called an object, becomes part of the document in which it is embedded. When you double-click an embedded object, you open the application in which the object was created where you can edit the object.

You can embed objects in an Impromptu report or you can embed Impromptu report into another application.

See also link and OLE (Object Linking and Embedding).

equi-join

A type of join that retrieves all the rows from one table that have matching rows in another table.

See also non-equi-join, outer join, and self-join.

expression

Any combination of operators, constants, functions, data items, and other components that evaluates to a single value.

expression editor

A dialog box or tab where you can create or edit an expression, including the following:

- Calculation Definition dialog box (Data tab Query dialog box)
- Data Definition dialog box (Data tab Query dialog box)
- Edit Calculation dialog box (Folders dialog box)
- Edit Condition dialog box (Folders dialog box)
- Filter tab (Query dialog box)
- New Calculation dialog box (Folders command Catalog menu)
- New Condition dialog box (Folders command Catalog menu)
- User Filter Profile dialog box (Filter tab User Profiles dialog box)

extension

Three characters that follow a file name. The following extensions are used by Impromptu:

- .bmp Windows bitmaps
- .cat Impromptu Catalogs
- .cq Cognos Query file
- .csv Comma delimited ASCII files
- .dat data file used to source PowerPlay reports
- .dbf dBASE files
- .dib Device Independent Bitmaps
- .htm Hypertext Markup Language files
- .icr Impromptu Catalog content reports
- .imr Impromptu Reports
- .ims Impromptu HotFiles
- .imt Impromptu Report Templates
- .iqd Impromptu Query Definition files
- .mac Cognos Macros
- .mcx Compiled Cognos macros
- .pdf Adobe Portable Document Format
- .sql Structured Query Language (SQL) files
- .tmp Temporary files
- .txt Text files
- .wmf Windows metafile graphic
- .xls Microsoft Excel files
- .xml Extensible Markup Language files

filter

A set of criteria used to retrieve a specific subset of records for your report. You can use a filter in reports to filter out unnecessary data and highlight the most important information in your report. For example, you can use a filter that shows only the data for your sales region.

If you are using Impromptu Administrator Version, you can create a filter for a user class that is automatically applied when the user class accesses the table or column specified in the filter. For example, you can create a filter on the Salary table so that only the Human Resources department can view that table. All other user classes will not see the Salary table.

See also detail filter, summary filter, and condition.

fixed association

A group association entered into the definition of a summary data item. Unlike an automatic association, the fixed association remains the same when you move it to a new location.

See also associated data item.

footer

A free-format area that appears at the bottom of a list frame or below a specific portion of a list frame.

See also header.

form frame

A type of frame that serves as a free-format container for other frames and report objects, Forms are useful when creating reports that require custom placement of data, text, tables, and other report objects. A form frame shows one row, or record, at a time.

See also child frame, parent frame, primary frame, and report object.

format symbol

Tells Impromptu how to show the data value. For example, the numeric format # symbol shows a single digit.

Format Toolbar

A bar with buttons and options you can use to format selected report objects.

See also toolbar and Toolbar button.

frame

A report object that acts as a container for other report objects. Frames are the basic building block with which you create Impromptu reports.

See also chart frame, child frame, form frame, list frame, parent frame, picture frame, primary frame, and text frame.

function

A function is a predefined calculation that takes one or more values, performs an operation, and returns a value. There are three kinds of functions in Impromptu: Impromptu functions, Database functions, and User-Defined Functions.

General format

A standard format based on the user's locale setting that displays data as follows when the locale setting is en-us.

Data	Format
Numbers	Display with no symbols.
Alphabetical/Alphanumeric data	Displays the string as retrieved from the database. To display data with an initial capital letter, use the "Aa*" format.
Dates	M/d/yyyy
Times	If cerlocale.xml uses a 12-hour clock, hh:mm am/pm If cerlocale.xml uses a 24-hour clock, hh:mm
Date-Time	M/d/yyyy hh:mm am/pm

Data	Format
Intervals	d hh:mm:ss.sss

group data item

A control data item that is used to group data in a report.

See also associated data item.

header

A free-format area that appears at the top of a list frame or above a specific portion of a list frame.

See also footer.

HotFile

A separate local data table that can be added to your catalog or used in a report as if it were a regular database table. Once you create a HotFile, any report or catalog can use it. You can use a HotFile to link to any database. For example, you can use HotFiles to compare this month's data with last month's data.

HTML

Hypertext Markup Language. HTML is the language used to create documents for the World Wide Web.

integer_exp

An integer constant, an integer data item, or any expression (including a numeric_exp) resulting in an integer value.

intranet

A computer network found within an organization that provides services similar to those found on the Internet but on a smaller scale.

interval_exp

An interval constant, an interval data item, or any expression resulting in an interval value.

join

Defines the relational links between tables in the physical database. These joins enable you to relate the data in one table to the data in another table in the same database so that you can retrieve data from more than one table at a time. You join tables using columns in tables. For example, the Customer table and the Sales table can be joined using the Cust column.

See also equi-join, non-equi-join, outer join, and self-join.

key

Keys are used to uniquely identify each record in a table. Keys are also used to make joins between tables. For example, Cust-id is the key of the Customer table because there can only be one customer ID for each customer.

Layout Toolbar

A bar with buttons and options you can use to work with report objects.

See also toolbar and Toolbar button.

LDAP (Lightweight Directory Access Protocol)

A product-independent protocol that is used to locate organizations, individuals, files, and other resources on the Internet or a corporate Intranet.

link

The connection between a linked object and the application in which it was created. When the information changes in the source file, the changes are reflected in the destination file. You can choose to update linked information manually or automatically.

See also embed and OLE (Object Linking and Embedding).

list frame

A type of frame that is designed to report tabular data in rows and columns. Each column in a list frame shows all the values for a data item in the database or a calculation based on data items in the database.

See also child frame, parent frame, primary frame, and report object.

locked catalog

A locked catalog restricts access to the catalog Creator user class. When a member of the catalog Creator user class attempts to open a locked catalog, they must provide password authentication to unlock the catalog before opening it. A catalog lock is specified by the administrator and exists in addition to the common logon authentication required by Cognos products and the catalog logon authentication. If a user, who is not a member of the catalog Creator user class, attempts to open a locked catalog, they are prompted for the usual catalog logon credentials only.

macro

A customized sequence of instructions ("macro commands") that Cognos' applications can carry out.

marked for insertion

A data item that appears in the report. This icon appears beside the data in the Data tab item (Query dialog box). Data items can be included in the query and not be marked for insertion in the report.

master distributed catalog

Intended for a workgroup or company where several users need to create and edit reports by using a common source of information. Only the Creator class can modify or change the master distributed catalog.

When users first open a master distributed catalog, Impromptu makes a copy of the master distributed catalog on the user's personal computer. This local copy is called a personal distributed catalog, and allows users to move and rename folders, and work off-line with Impromptu.

Impromptu maintains links between master distributed catalogs and personal distributed catalogs, and automatically updates these personal distributed catalogs whenever changes are made to the master distributed catalog.

See also catalog, personal catalog, shared catalog, secured catalog, and source catalog.

measure

In PowerPlay, the numbers by which you gauge the performance of your organization. For example, measures can be Revenue, Revenue/Employee, and Profit Margin %.

metacharacter

A character used in pattern matching, such as asterisk (*), at-sign (@), caret (^), exclamation (!), left angle bracket (<), or-bar (|), parentheses (()), pound (#), question mark (?), right angle bracket (>), or slash (\).

metadata

Information about the catalogs, schemas, tables, and columns in the database.

metafile

An image that is generated by the calculation of position on the screen. It can produce more intricate images than a bitmap. Windows metafiles have the extension .wmf.

namespace

A source of authentication data used by Access Manager that exists as a directory on a directory server, or as an entry in a local authentication export (.lae) file, depending on the default security server configured in the system registry.

The security data stored in each namespace, such as signon information for users, user classes, application servers and data sources, distinguishes each entry from all other namespaces in the repository.

nested crosstab

A crosstab report that contains more than one data item in the rows or columns. For example, you can nest Product Type and Product Line beside each other in the rows.

non-equi-join

A type of join that retrieves all the rows from one table that meet the criteria in another table. For example, for each product, you can list the active accounts that have not purchased a product using the not equal to (<>) operator.

See also equi-join, outer join, and self-join.

numeric_exp

A numeric constant, a numeric data item, or any expression resulting in a numeric value.

object

Any piece of information that you create and edit, often with an application other than Impromptu, and then insert and store in an Impromptu report.

ODBC (Open Database Connectivity)

A Microsoft vendor neutral interface between database management systems (DBMS) from multiple vendors. It is based on existing standards from the SQL Access Group (SAG), X\Open, and ANSI.

ODBC driver

A dynamic-link library (DLL) that an ODBC-enabled application, such as Impromptu, can use to gain access to a particular data source. Each database management system (DBMS), such as dBASE, requires a different driver.

OLE (Object Linking and Embedding)

A Microsoft Windows facility that enables applications to share data. When you use OLE, two applications can share data through a connection that you establish.

See also link and embed.

OLE automation

An industry standard that allows applications to expose OLE objects to development tools, macro languages, and other applications that support the standard. With OLE automation, you can work in one application from within another application.

ownership collection

A collection whose elements (objects) are dependent on the collection's parent. For example, the Column objects in the Columns collection are dependent on the parent Table object. If the Table object is deleted, the Column objects in the Columns collection are also deleted.

See also reference collection.

operator

Specifies what happens to the values on either side of the operator.

There are four types of operators:

- Logical: defines relationships between two parts of the expression.
- Arithmetic: performs arithmetic operations on two parts of an expression.
- String: concatenates two character strings.
- Comparison: compares one or more values that you enter against the values in the database.

outer join

A type of join that retrieves rows from one table even if the rows in another table do not match. You can use the following kinds of outer joins:

- A left outer join includes all rows from Table A, matched or not, plus the matching values from Table B.
- A right outer join includes all rows from Table B, matched or not, plus the matching values from Table A.
- A full outer join includes all rows from both tables, merged where matches were found.

See also equi-join, non-equi-join, and self-join.

parent filter

A filter created for the parent user class of the selected user class. For example, a user class called Employees is based on the user class called Managers. In this case, the Managers user class is the parent user class. If you create a filter for Managers, it is automatically applied to Employees. The filter for Managers is a parent filter for Employees.

parent frame

A frame that contains one or more subordinate frames or report objects.

See also child frame, primary frame, and report object.

percentile

The value on a scale of one hundred that indicates the percent of a distribution that is equal to or below it.

personal catalog

Intended for the small business owner who wants to maintain data such as personal information, customer lists, and product pricing. Use a personal catalog if you are the only person using the catalog and you are using the Administrator Version of Impromptu.

See also catalog, distributed catalog, shared catalog, and secured catalog.

personal distributed catalog

Personal distributed catalogs exist on the user's personal computer, and are copies of the master distributed catalog. They are created the first time the user attempts to use a master distributed catalog. Users can work off-line with their personal distributed catalogs. They can also modify their personal distributed catalogs by moving and renaming folders. However, they cannot change the tables, columns, or joins that are defined for the distributed catalog.

Impromptu maintains links between the master distributed catalogs and personal distributed catalogs, and automatically updates the personal distributed catalogs whenever changes are made to the master distributed catalog.

See also catalog, personal catalog, shared catalog, secured catalog, and source catalog.

picture

Any Windows bitmap file (.bmp) or Device Independent Bitmap (DIB) file that is stored in a location your computer can access.

picture frame

A frame that you can use to show a bitmap (.bmp) or Device Independent Bitmap (DIB). You can enhance the appearance of your reports by adding images such as a company logo. In addition, you can show pictures, such as your company's products or employees, that change based on the content for the items.

See also child frame, parent frame, primary frame, and report object.

pivot

A quick way to change a list report into a crosstab report. Pivot by dragging and dropping one or more columns into the row titles area.

placeholder

A representation of what data should appear in place of the placeholder. Placeholders determine where and how the data and calculations will be positioned and shown in reports that use the template. Placeholders can be defined as optional or required. Placeholders can also be defined to accept one column or many columns. For example, you can add placeholders to a template that represent the customer's address in a report. This helps other users understand how to complete the report.

PowerCube

A file that contains data that is structured to provide for fast retrieval and exploration in PowerPlay.

PowerPrompts

A series of HTML forms that Impromptu Web Reports consumers use to customize a report before they run it. The Impromptu report author creates a PowerPrompts application using the PowerPrompts Developer Studio, then delivers the application along with the report to the Impromptu Web Reports administrator.

prompt

A dialog box that asks the user to enter information when a report is opened. A report can contain several prompts which it uses to filter so you only get the data you want. Prompts can require the user to type in information, or select items from a picklist. A picklist can include data items from the catalog, data items from another report, or data from a file in delimited ASCII format.

See also Prompt Manager.

Prompt Manager

The dialog box you use to create, edit, delete, and store prompts for the currently active report.

prompt references

Prompt references are expressions such as detail filters, summary filters, calculations, and conditional format expressions that reference a prompt.

primary frame

A frame that serves as the default object into which Impromptu inserts report objects such as placeholders and data. The first form frame or list frame that is created in a report or template is automatically designated as the primary frame.

See also chart frame, child frame, form frame, list frame, parent frame, picture frame, report object, and text frame.

property

A named attribute of an object.

query

A question to the database, snapshot, or HotFile that defines what data you want to retrieve from the data source.

record

Composed of one data value from each column in the dataset. Also known as a row.

reference collection

A collection whose elements (objects) are not dependent on the collection's parent, they are only referenced from a collection that the objects are depended on. For example, the Table objects in the FilteredTables collection are not dependent on the parent UserClass object. If the UserClass object is deleted, the Table objects in the FilteredTables do not cease to exist because the collection that the Table objects depend on still exists.

An object cannot only belong to a reference collection, although it can belong to more than one reference collection. It must also belong to an ownership collection.

See also ownership collection.

relational database

A collection of information that is organized into tables.

report

A view of the current data in your company database that is organized and formatted the way you want it. The data you see in your report depends on the data you can access from your catalog. A report can be based on a template.

See also template.

report author

An Impromptu user who creates complex reports and has an in-depth knowledge of the powerful features in Impromptu. The *Mastering Impromptu Reports* online help file is intended for report authors.

report creator

An Impromptu user who creates basic reports using the Report Wizard or a template, and applies essential skills, such as sorting, grouping, formatting, and basic filtering. Report creators can find the information they need in the Impromptu online Help.

report definition

A definition of the data in the report and how the data is shown and formatted. The report definition is static; it does not change when the report data changes. The database provides you with access to the most current data in the database. Therefore, when you save a report, you are not saving the actual data in your report, only the report itself. To save the report data, create a snapshot, create a HotFile, or use the Save As command to move the data to an external file in a specified format (for example, Microsoft Excel). You can also print the report using the Print command to save a copy of its current data.

Report Navigator

An optional control in a HyperText Markup Language (HTML) and PDF report that enables you to jump to a grouped column value. In an HTML report you can also jump to a specific page number.

report object

An object in a report. Report objects include text, pictures, frames, data items, report variables such as Date and Page Number, and so on. You can format report objects using the Format menu commands.

report variable

A value that is supplied by your computer or by Impromptu. Report variables are inserted into reports using the More Objects command from the Insert menu.

report viewer

An Impromptu user who views reports, prints reports, or exports information found in existing reports. Report viewers can find the information they need in the Impromptu online Help and the *Discovering PowerPlay* book.

result set

A copy of the data retrieved by a report. A result set can be stored locally on a personal computer, or remotely on a server.

row

Composed of one data value from each column in the database. Also known as a record.

running-average

A summary that displays a new average for each additional value in a selected data item.

running-count

A summary that counts each value in a selected data item one by one.

running-maximum

A summary that displays a new maximum for each additional value in a selected data item.

running-minimum

A summary that displays a new minimum for each additional value in a selected data item.

running-total

A summary that displays a new total for each additional value in a selected data item.

scope of data

A property of form frames that determines what data they can show. A form frame can show a single row of data, all rows associated with the grouped data item, or all data the form frame can access.

secured catalog

Intended for users who do not need or want to create or edit their own reports. The users cannot change the catalog in any way. They can run, export, and print reports that the administrator has created. This type of catalog is useful for users who are not familiar with Impromptu and just want to analyze the data in the pre-defined reports.

See also catalog, distributed catalog, personal catalog, and shared catalog.

self-join

A type of join that enables you to add two copies of the same table to a catalog so that you can relate values within a single table.

See also equi-join, outer join, and non-equi-join.

shared catalog

Intended for a workgroup or company where several users need to create and edit their own reports. A shared catalog is ideal in a LAN environment where the catalog can be stored in a shared drive and directory that everyone can access.

See also catalog, personal catalog, distributed catalog, and secured catalog.

signon

A User ID and password that is used to identify individual users and govern their access to resources.

snapshot

A permanent local copy of the report and the data retrieved by a report. The data on your personal computer can be shown and even manipulated at a later date without having to connect it to the original database.

source catalog

A distributed catalog on the LAN that is maintained by the administrator. When users open a distributed catalog, Impromptu makes a copy of the catalog on the user's personal computer. Impromptu maintains a link with the original source catalog so that if any changes are made to the original, each user's copy is updated automatically. Also called a master distributed catalog.

SQL (Structured Query Language)

The structured query language for accessing relational database information. You do not need to know SQL to use Impromptu; Impromptu automatically generates the SQL needed to retrieve the data for your report.

standard deviation

A measure of how much the data varies from the mean, expressed in the same units as the data (for example, inches, seconds, days). The square root of the variance is standard deviation.

Standard Toolbar

A bar with buttons and options you can use to create new reports, open existing reports, cut, paste, and copy report objects, and perform many other routine commands while you work with Impromptu reports.

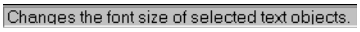
See also toolbar and Toolbar button.

status line

A bar that appears at the bottom of the report window. The status line is a source of context-sensitive help. The status line is continually updated to provide you with information as you are working. It tells you what is happening, where you are, and what your options are. If your pointer is over a Toolbar button or if you have highlighted a command, the status line tells you what the command does.

The status line is divided into three sections:

- the catalog section shows which catalog is currently active.
- the report section shows report information such as progress indicators during saving, retrieving, and printing. It also shows coordinates during drag and drop operations.
- the general section provides information about memory, keyboard toggles, and product toggles (such as auto-retrieve).



stored procedure

A procedure defined and stored in a host database (such as Oracle or Sybase) that performs actions on the database.

string

A character string enclosed in quotation marks. For example: "Cognos."

string_exp

A string constant, a string data item, or any expression resulting in a string value.

style

A defined group of formatting options that you can apply to selected report objects.

sub-report

A sub-report is a sub-query that is usually associated with a main query. You can include several sub-reports in one report. With sub-reports, you can deliver information in one report that would otherwise be available only with two or more reports.

summary

A summary component combined with a data item that has either fixed or automatic association.

The association of a summary determines the group for which it is calculated.

For example, if Total (Sales) is located in the Branch footer, then you will see the total sales for each branch.

A summary can have either automatic association or fixed association with its location.

A summary with automatic association changes depending on its location. For example, if you move Total (Sales) from the Branch footer to the Country footer, then you will see the total sales for each country.

If a summary is explicitly associated, its value will reflect the group to which it is associated, regardless of where you put it in the report. For example, if the summary Total (Sales) is associated with the Country group and you place it in the City footer, then the summary will still reflect the total sales for each country.

summary filter

Limits the data retrieved in a report and can include summary components. A summary filter eliminates data from a report based on summary data items. For example, you could create a summary filter that eliminates all distributors with sales totaling less than $100,000. Data item summary values are calculated after the summary filter is applied.

See also detail filter.

summary component

An operation that enables you to extract summary information from your data in the following ways: total, minimum, maximum, average, count, rank, percentile, percentage, running-total, running-minimum, running-maximum, running-average and running-count.

swap

Exchanges the positions of rows and columns in a crosstab report.

synonym

An alternative name for a table, view, alias, or another synonym. A synonym can be used in SQL statements wherever a table or view is used. Use a synonym to substitute the value of the synonym within the SQL.

syntax

Specific grammatical rules.

table

A portion of the database or HotFile that contains one kind of information organized into rows and columns. In Impromptu, a table is a label for the item that points to the database table. A catalog identifies the tables from the database that you want to access in Impromptu.

template

A template is a pattern you can use to build reports. By using templates, you can save time and effort when you create new reports. If you create the same type of report frequently, the template can be your guide.

A template can contain placeholders and store formatting information. You can specify information about margin settings, page orientation, font choices for different report objects, and so on.

text frame

A type of frame that contains text or data. Text frames are useful when creating blocks of static text (as in form letters) or dynamic text based on data. All text in Impromptu reports is contained in text frames. For example, whenever you see a data cell in a list frame, or a label in a summary calculation, you are seeing a text frame.

See also child frame, parent frame, report object, and primary frame.

text object

An object that includes text.

thumbnail

A mode of operation you can set in Impromptu to create a temporary data file with a restricted number of rows.

time_exp

A time constant, a time data item, or any expression resulting in a time value.

toolbar

A bar with buttons that perform commands.

See also Standard Toolbar, Format Toolbar, and Layout Toolbar.

Toolbar button

A button that you click to perform an action. Buttons that perform related actions are grouped on a toolbar.

type library

A collection of all exposed Impromptu objects, properties, and methods. The type library makes it easier for programmers to use Impromptu automation components in their code.

user class

A group of users (or a single user) who need access to the same data in the catalog and who have the same access privileges. For example, European salespeople all need data on their customers who are in Europe, while North American salespeople need data on their customers who are in North America.

user profile

All the information about a user class, such as the name of the user class, password, data access privileges, and whether the user class can create reports.

See also user class.

variable

A value that is supplied by your computer or by Impromptu. Variables are inserted into reports using the More Objects command from the Insert menu.

variance

The amount the individual data points differ from the average. This is calculated as the sum of the square of the deviations from the mean, divided by one less than the number of observations. For example,

variance =	$e_1 + e_2 + e_3$
	2

view

A definition stored in a database's metadata that defines a ‘virtual table‘ that does not exist until referenced in an SQL statement, such as a select statement.

Windows Common Logon Server

A server that records information about the users of a Windows-based application so that they can log on once and access multiple data sources.

ymdinterval_exp

A year-month-day interval expression.

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