

Extras and saved sets ^[1]

December 8, 2016 by [Carl Sorenson](#) ^[2]

Some m-Fin reports have quite a few EXTRAS. Our new saveset buttons are intended to help.

Several years ago we began introducing EXTRAS prompts into m-Fin reports. EXTRAS make a report more flexible, providing user-selectable optional report columns. Initially EXTRAS prompts contained just a handful of columns to choose from but now we have some m-Fin reports with over twenty columns offered. If you need ten of them that's ten more clicks to run the report. This is OK if you are tailoring a different set of columns each time but tedious if you almost always pick the same columns. So today we are introducing saveset buttons. Clicking the save button stores the current EXTRAS selections into your web browser's local storage. When you return to run the report again, even if several days have passed, your saved set of selections is available via the *apply* button.

Since this is happening in your web browser instead of on the Cognos server, a saved set lasts until you clear history (also known as "clearing cookies and cache"). If you have your web browser set to clear history automatically every time you close it you might want to consider turning off this feature in order to take full advantage of saved sets.

The screenshot displays the 'EXTRAS' prompt interface. On the left, a list of checkboxes allows users to select report columns. The selected items are highlighted in yellow: ☒ SPDTYPE CODE, ☒ SPDTYPE DESC, and ☒ SUBCLASS CODE (SUB). Other unselected items include FUND CODE (FND), DEPT ID (ORG), PGM CODE (PGM), BUSINESS UNIT PC (BU PC), PROJ ID (PROJ), ACTIVITY ID (ACT), POSITION (POSN), JOURNAL LN REFERENCE CODE (REF), PAYCHECK NUM, POSTED DATE, OPER NAME, and PET OPER ID, DATE, SEQ. At the bottom of the list are links for 'Select all' and 'Deselect all'. To the right of the list are two buttons: 'Save →' and '← Apply'. A red box with an arrow pointing to the 'Save' button contains the text: 'The Save button writes the current selections to the saved set.' Another red box with an arrow pointing to the 'Apply' button contains the text: 'The Apply button changes the current selections, setting them to the values in the saved set.' To the right of these buttons is a section titled 'Saved set:' which lists the current saved selections: SPDTYPE CODE, SPDTYPE DESC, and SUBCLASS CODE, all highlighted in yellow.

EXTRAS prompt with saveset buttons

We have implemented saveset buttons in the following reports:

- m-Fin FINANCIAL DETAIL II
- m-Fin SPEEDTYPE ONE-LINER
- Project Reports > m-Fin PROJECT ONE-LINER
- Project Reports > m-Fin PROJECT SPEEDTYPE ONE-LINER

Saveset buttons vs. Cognos report views

Cognos already provides a feature for saving prompt selections, called *report views*. Report views save all prompt selections, and they can save output too. I show how to begin using report views in my blog post that explains how to [save your own preset prompt values](#) [3]. So why did we develop saveset buttons when Cognos already has report views? We want to avoid compelling users into having to learn report views based solely on the number of options in our EXTRAS prompts.

OK with m-Fin's prompting except for that tedious EXTRAS prompt that you keep having to configure the same way every time? Use the saveset buttons. There is nothing to learn except that the saved set goes away when you clear history. Think the saveset buttons are too simple, just scratching the surface of what you'd really like to see for this kind of thing? Learn report views.

Microsoft Internet Explorer

If you are in Microsoft's Internet Explorer web browser (MSIE) our saveset buttons will not work. This will be fixed with version 11 of the Cognos software. CU expects to upgrade in Spring 2017.

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