

IBM Cognos Express
Version 10.1.0

Business Insight User Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 119.

Product Information

This document applies to IBM Cognos Express Version 10.1.0 and may also apply to subsequent releases. To check for newer versions of this document, visit the IBM Cognos Information Centers (<http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp>).

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Introduction

This document is intended for use with IBM® Cognos® Business Insight. It provides step-by-step procedures and background information to help you create workspaces. IBM Cognos Business Insight is a web product for creating interactive workspaces using IBM Cognos content, as well as external data sources, according to your specific information needs.

Audience

To use this information, you should have knowledge of your business requirements.

Finding information

To find IBM Cognos product documentation on the web, including all translated documentation, access one of the IBM Cognos Information Centers. Release Notes are published directly to Information Centers, and include links to the latest technotes and APARs.

You can also read PDF versions of the product release notes and installation guides directly from IBM Cognos product disks.

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. IBM Cognos Business Insight has accessibility features. For information on these features, see the accessibility section in this document.

How-to videos

To help you get the most value from IBM Cognos Business Insight, IBM provides instructional videos that you can access through the product. Depending on feedback from you and other customers, we may choose to expand, or reduce the role of videos in future releases. These videos are hosted on the Internet and might not be available; for example, your Internet access might be blocked, or the hosting server might be temporarily unavailable. All of the topics explained in these videos are also covered in the online product documentation.

Forward-looking statements

This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

Samples disclaimer

The Great Outdoors Company, GO Sales, any variation of the Great Outdoors name, and Planning Sample depict fictitious business operations with sample data

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Chapter 1. What's new?

This section contains a list of new features for this release.

To review an up-to-date list of environments supported by IBM Cognos products, including operating systems, patches, browsers, web servers, directory servers, database servers, and application servers, visit the IBM Cognos support pages at <http://www.ibm.com>.

For more information about new features for this release, see the *New Features Guide*.

New features in version 10.1.1

There are several new features since the last release.

Resize charts

You can now resize a chart in a widget. In the previous release, resizing a chart resulted in either scrollbars or white space in the widget. In this release, when you resize a chart in a widget, the chart resizes to fit the widget. If there are multiple charts in the widget, the charts will not resize.

Swap rows and columns

You can now swap rows and columns in crosstabs and charts to look at information from a different perspective.

For more information on swapping rows and columns, see “Swap rows and columns” on page 66.

Position Content pane to the left of the workspace

You can now configure the **Content** pane to appear on the left side of the workspace.

By default, the **Content** pane appears on the right side of the workspace. For steps on how to move the **Content** pane to the left side, see “Positioning the Content pane” on page 10.

As a result of this change to the user interface, the Content button that was used to expand and collapse the **Content** pane is removed from the application bar. There are still several ways to expand the **Content** pane. For more information, see “Content pane” on page 9. Also, the search field is moved from the application toolbar to the top of the **Content** pane. The search field stays with the **Content** pane regardless of whether you position the **Content** pane to the right or the left.

Add Active Report content

You can now add IBM Cognos Active Report content to Business Insight.

For more information see, “Active Report content” on page 26.

User interface improvements

IBM Cognos Business Insight has a lighter and cleaner user interface.

The new user interface includes the following enhancements:

- Borders, menus, buttons and fonts are lighter and cleaner.
- User interface performance is improved.
- A color picker allows you to easily set custom colors for widget backgrounds, widget borders, and workspace backgrounds.
- Widget toolbars are removed from slider filters and select value filters. To access the widget actions and properties, right-click on the widget to display the context menu.
- You can position widgets closer together.
- Widget borders are thinner and only appear when you select a widget.

Dashboards are now workspaces

In IBM Cognos Business Insight, the term *dashboard* is replaced by the term *workspace* to describe a web page that contains widgets that graphically represent business data.

Improved thumbnails

Thumbnails in IBM Cognos Business Insight are improved to display a more accurate view of the layout, including the background and widget colors of a workspace. The thumbnails allow you to quickly locate and identify workspaces on the Getting Started page, in the information cards, and in the thumbnail view of the **Content** pane.

This release also includes performance enhancements for thumbnails.

If your thumbnails do not reflect your changes to the layout and the colors of a workspace, restart your web browser.

If you prefer to use the thumbnails from the previous version of Business Insight, contact your administrator.

More meaningful names for Analysis Studio report parts

IBM Cognos Analysis Studio now supports user-specified names for report parts. If the author of an Analysis Studio report enters report part names, you will see the report names in the **Content** pane in IBM Cognos Business Insight when the Analysis Studio report is expanded.

Microsoft Internet Explorer support

Version 9 of the Microsoft Internet Explorer web browser is now supported for IBM Cognos Business Insight.

For a full list of supported software environments, see <http://www.ibm.com>.

Mozilla Firefox support

Version 4 of the Mozilla Firefox web browser is now supported for IBM Cognos Business Insight.

For a full list of supported software environments, see <http://www.ibm.com>.

Freedom Scientific JAWS support

Version 12 of Freedom Scientific JAWS is now supported for IBM Cognos Business Insight.

For a full list of supported software environments, see <http://www.ibm.com>.

Larger worksheet sizes for Microsoft Excel 2007 report outputs

IBM Cognos Business Intelligence now supports a larger worksheet size for report outputs exported in Microsoft Excel 2007 format.

In previous versions of IBM Cognos Business Intelligence, report output in Microsoft Excel format was limited to a maximum of 256 columns by 65,000 rows. Although this remains as the default worksheet size, administrators can now enable larger worksheets and change the maximum number of rows in a worksheet - up to a maximum of 16,384 columns by 1,048,576 rows - by using advanced server properties. This number matches the Microsoft Excel 2007 worksheet size limitations.

For more information, see the *IBM Cognos Business Intelligence Administration and Security Guide*.

For an up-to-date list of environments supported by IBM Cognos products, such as operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit <http://www.ibm.com/>.

Related concepts:

“Exporting workspace widgets to different formats” on page 81

You can export individual report widgets that contain report content to the following formats: PDF, Microsoft Excel, CSV, and XML.


Chapter 2. Understanding IBM Cognos Business Insight

IBM Cognos Business Insight is a web-based tool that allows you to use IBM Cognos content and external data sources to build sophisticated interactive workspaces that provide insight and facilitate collaborative decision making.

Launching IBM Cognos Business Insight

To get started using the product, there are several ways you can open IBM Cognos Business Insight.

You can launch Business Insight using the following methods:

- From the IBM Cognos Business Intelligence Welcome page
- From IBM Cognos Connection by clicking the new workspace button  in the application bar
- In a web browser by entering the URL for IBM Cognos Business Insight using the following format: `http://machinename/ibmcognos/cgi-bin/cognos.cgi?b_action=icd` or the URL that your administrator provides
- By clicking the hyperlinked name of an existing workspace object from IBM Cognos Connection
- From the **Launch** menu in IBM Cognos Connection and IBM Cognos Administration
- From a workspace listed in the search results in IBM Cognos Connection

Browser chrome

The browser chrome includes toolbars and menus on a web browser. Whether the browser chrome is displayed depends on how you launch Business Insight. Business Insight opens in a chromeless browser if you launch from the IBM Cognos Business Intelligence Welcome page. If you launch directly in a browser by entering a URL, then your browser displays the chrome.

Minimal support for Microsoft Internet Explorer 6

IBM Cognos Business Insight does not fully support Microsoft Internet Explorer 6. When you use this browser, Business Insight might function correctly; however, performance is reduced and the appearance is degraded. For intended visual display and performance, use a more recent browser such as Mozilla Firefox version 3.5 or higher, or Microsoft Internet Explorer 8.

Logging on


IBM Cognos software supports authenticated and anonymous user access. To use IBM Cognos software as an authenticated user, you must successfully log on.

If you want to see a summary of your logon information for the current session, complete the following. From the workspace **Actions Menu** launch IBM Cognos Connection, click **My Area Options**, **My Preferences** and then click the **Personal** tab. This is not available to anonymous users.

Before you begin

During the logon process, you must provide your credentials, such as user ID and password, as required by your organization. Anonymous users do not log on.

Procedure

1. On the application bar, click the **Actions Menu** button  and select **Log On**.
2. If the namespace **Log on** page appears, in the **Namespace** box, select the namespace you want to use.
3. Type your user ID and password, and click **OK**.

Results


Your session starts.

Logging off

You log off to end your session. Even if you used multiple namespaces in the session, you log off only once.

If you close your web browser without logging off, your session ends.

Procedure

1. On the application bar, click the **Actions Menu** button  and select **Log Off**.
You are now logged off of all the namespaces that you were using.
2. Choose whether to log on again:
 - If you do not want to log on again, close your web browser.
 - If you want to log on as an authenticated user, click **Log on again**.
 - If you want to log on as an anonymous user, click **Open a session as an anonymous user**. This is available only if your administrator set it up.

The user interface

The IBM Cognos Business Insight user interface has a Getting Started page, an application bar, a workspace layout area, a content pane, and widgets.




Getting Started page

The Getting Started page displays when you launch IBM Cognos Business Insight.

From the Getting Started page you can perform the following tasks:

- View and open your favorite workspaces and reports
- Create a new workspace
- Open an existing workspace
- View how-to videos that provide an overview to Business Insight







The Getting Started page disappears when you click the **Create New** or **Open Existing** buttons, open an existing workspace or report from the favorites list, or select the **New** or **Open** menu options in the **Actions Menu** .

If you do not want the Getting Started page to display every time you launch Business Insight, you can disable it from the **My Preferences** menu option.








Application bar

The application bar displays the name of the current workspace.

The application bar contains the following icons:

-  Access the application **Actions Menu**
-  Create a new workspace
-  Open an existing workspace
-  Save a workspace
-  Email the workspace as a link
-  Collaborate on the workspace using IBM Connections

Note: You will see this icon only if collaboration is set up.

-  Refresh all widgets on the workspace
-  Set the workspace layout and edit the workspace style
-  Open the **Content** pane to insert content or toolbox widgets onto the workspace
-  Return to your home page, or specify a new home page
-  Access the help system, launch how-to videos, and find additional information about Business Insight and other IBM Cognos products from the **Help** menu
-  Add a workspace to or remove a workspace from your list of favorites
- Open the **Content** pane to access the **Content** and **Toolbox** tabs
-  Search for content

Workspace

Use a workspace to combine data from various sources and gain insight into your business. A workspace is a collection of widgets that typically display tables or charts of data, text, images, HTML pages, or RSS feeds.

Dotted guidelines appear when you insert, move, or resize widgets. They provide a visual aid to assist you in aligning widgets.

To assist with content formatting, IBM Cognos Business Insight has two layout actions that automatically arrange the widgets on the workspace:



- **Fit All Widgets to Window**
- **Arrange All Widgets to Fit Content**

For more information on these layout actions, see “Modifying the workspace layout” on page 48.

Content pane

The **Content** pane is available on-demand and displays the objects that you can add to the workspace.

When you launch the Getting Started page, the Content pane is collapsed. You can expand the **Content** pane in the following ways:

- On the Getting Started page, click the **Create New** button.
- On the far right or left edge of the Getting Started page, click the middle of the collapsed **Content** pane.
- On the application bar, click the new button .
- On the application bar, click the insert button , and select **Insert Content**.

The **Content** pane contains two tabs: **Content** and **Toolbox**. The **Content** tab displays IBM Cognos content that you can add to the workspace. The **Toolbox** tab displays widgets that access other types of content such as, images and web pages, and widgets that control the data on the workspace. You insert objects by dragging them from the **Content** and **Toolbox** tabs to the workspace.



Tip: In the **Content** pane, you can also right-click objects to insert them on the workspace, or select the object and use the keyboard shortcut Ctrl+Shift+Enter.

Content tab

The **Content** tab displays the IBM Cognos content that can be added to a workspace and workspaces that can be opened. The content is the same content that is displayed in IBM Cognos Connection, excluding any content that has been filtered out.

There are two expandable folders:

- **My Folders** contains your personal content and workspaces.
- **Public Folders** contains entries that are of interest to and can be viewed by many users.

Within the **Content** tab, you can enable and disable the display of information cards by clicking the information card button . For more information, see “Viewing information cards” on page 89. You can also refresh the content in this tab by clicking the refresh button .

The **Content** tab displays content in one of the following views:

- Thumbnail
- List
- Tree

Within each of these views, you can filter the content. The available filters are accessed from the drop-down list at the top of the **Content** tab. You can filter by using the following criteria:

- **All Content** displays all content in the content store, excluding any content that is not supported in Business Insight. This is the default setting.

- **My Favorites** displays workspaces and reports that have been marked as favorites.
- **My Folders** displays only the content in your **My Folders** folder.
- **Search Results** displays content based on search results. You must first perform a search, otherwise this filter is not available.

Toolbox tab

The **Toolbox** tab displays additional widgets provided by Business Insight. The slider filter and select value filter widgets allow you to filter report content. The other toolbox widgets allow you to add more report content to the workspace, such as HTML content, images, RSS feeds, and rich text. For a list of toolbox widgets, see “Toolbox widgets” on page 11.

Positioning the Content pane

You can customize the position of the **Content** pane. The default location of the **Content** pane is to the right of the workspace. You can move the **Content** pane to the left side if you prefer.

Procedure

1. On the application bar, click the **Actions Menu** button and click **My Preferences**.
2. Then, in the **Set Preferences** window, clear the **Position pane on the right** check box, and click **OK**.
3. Refresh your web browser.

Widgets



Objects you add from the **Content** pane to the workspace are displayed in widgets. Widgets are containers that allow you to interact with and manipulate the content contained within them.

Widgets have an on-demand toolbar that is displayed when the widget is selected or in focus. The available toolbar options depend on the type of widget and the content displayed in the widget. Slider filters and select value filters do not have a toolbar. To access the widget actions on a slider filter or select value filter, right-click on the widget.

Widgets can also communicate with other widgets. For example, you can use a select value filter widget to control what data is dynamically filtered in a report widget.

Maximizing widgets

You can maximize a widget to view the report content in more detail or to view the content that exceeds the size of the widget. Maximizing is useful for viewing report content in large complex tables and detailed charts that cannot be fully displayed in the widget within the constraints of the other workspace objects.

To maximize a widget, on the top right of the widget toolbar, click the maximize button . To restore the widget and view the workspace again, click the restore button .

Tip: You can also modify the number of rows to display in a widget. For more information, see “Set report widget properties” on page 25.

Content widgets

The following widgets are used when content objects are added to the workspace from the **Content** tab.

Report widget:


When a report object (report or report part) is added to a workspace, it is displayed in a report widget. Report objects include reports created in IBM Cognos Report Studio, IBM Cognos Query Studio, IBM Cognos Analysis Studio, and IBM Cognos Metric Studio.

Report views and saved report output versions are also viewed in a report widget. For more information on report widget content, see “Report content” on page 21.

IBM Cognos Navigator widget:

You can add an IBM Cognos Navigator widget to the workspace by dragging a folder item from the **Content** tab to the workspace. Folder items include content folders and packages. Use this widget to browse a list of links that open published IBM Cognos reports and other entries in IBM Cognos Viewer or the associated studio.

You can also open the same navigation view in IBM Cognos Connection by

clicking the arrow button  in the widget. For more information, see “IBM Cognos Navigator” on page 30.

PowerPlay widget:

When an IBM Cognos PowerPlay[®] report is added to a workspace, it is displayed in HTML in a PowerPlay widget or as a PDF in a widget.

For more information, see “PowerPlay content” on page 26.

TM1 widget:

When IBM Cognos TM1[®] Websheets or TM1 Cube views are added to a workspace, they are displayed in HTML in TM1 widgets.

For more information, see “TM1 content” on page 28.

Toolbox widgets

You can add toolbox widgets to the workspace from the **Toolbox** tab.

Note: If any toolbox widgets are missing, it might be because your system administrator has removed access to them.

Image widget

The image widget is used to display images. For more information, see “Adding an image widget” on page 35.

My Inbox widget

The **My Inbox** widget is used to show a Really Simple Syndication (RSS) feed of your secure approval requests, ad-hoc tasks, and notification requests from **My Inbox** in IBM Cognos Connection. For more information, see “Adding a My Inbox widget” on page 36.

RSS feed widget

The RSS feed widget is used to display RSS news feeds. For more information, see “Adding an RSS feed widget” on page 37.

Select value filter widget

The select value filter widget is used to filter the data in other widgets; you select or deselect the data items you want to display or remove. For more information, see “Adding a select value filter widget” on page 39.

Slider filter widget

The slider filter widget is used to filter the data in other widgets; you display or remove data items using a range slider filter. For more information, see “Adding a slider filter widget” on page 41.

Text widget

The text widget is used to enter, format, and display text. For more information, see “Adding a text widget” on page 43.

Web page widget

The web page widget is used to display HTML based content. For more information, see “Adding a web page widget” on page 44.

Actions menus

An action menu is available for the workspace and for each widget on the workspace. The items available in each menu depend on user capabilities and the type of widget selected.

Actions menu

The available actions at the application level include the following menu options:

- **New** creates a new workspace.
- **Open** opens an existing workspace.
- **Save** saves changes to a workspace.
- **Save As** saves a workspace with a new file name or new location.
- **Email Link** sends the URL of the current workspace by email, or copies the URL to the clipboard so it can be pasted into other documents.
- **Copy Link to Clipboard** copies the URL to the clipboard so it can be pasted into other documents.
- **Edit Workspace Style** changes the visual appearance of the workspace style and widgets to customize the look of your workspace.

- **My Preferences** sets personal preferences for accessibility support for reports, Getting Started page display, product and content language, and time zone.
- **Log On** if your system requires authenticated access to launch Business Insight. Log off to end your session.
- **Launch** starts installed IBM Cognos applications that you have permission to use.
- **Refresh All** refreshes all workspace widgets.

Widget actions

The actions available for a widget depend on the widget content and widget type.

All workspace widgets provide the following actions:

- **Remove from Workspace** deletes the widget and content from the workspace.
- **Listen for Widget Events** sets widget to widget communication.
- **Resize to Fit Content** makes the widget the right size to display all of its content without excess white space or scrollbars.
- **Send to Back** makes the selected widget appear behind other widgets when two or more widgets overlap.
- **Properties** sets the available properties for the widget.

Report widgets also provide the following actions:

- **Print as PDF** prints the selected widget content to a PDF document.
- **Export to** creates PDF, Excel, CSV or XML format versions of the widget data.
- **Versions** displays different versions of the report content if there are saved output versions available.
- **Refresh** updates the widget content with the latest data.
- **Prompt Again** displays the prompt values if the widget contains prompted report content.
- **Reset** updates the report content to the most recent version.
- **Do More** opens the report in the advanced mode. This mode allows you to change the report content and apply more advanced sorting, filtering, calculations, summaries, and formatting.

PowerPlay widgets provide the standard widget actions as well as the following actions:

- **Export** creates CSV and XLS format versions of the widget data.
- **Refresh** updates the widget content with the latest data.
- **Show Dimension Viewer** displays the dimension view in the widget.

TM1 Cube Viewer widgets provide the standard widget actions, as well as the following actions:

- **Refresh** updates the widget content with the latest data.
- **Reset** sets the Cube view to the original view.
- **Restart** restarts a session after a session timeout.


TM1 Websheet widgets provide the standard widget actions.

Setting a home page

You can set any saved workspace in IBM Cognos Business Insight as your home page.

When you set a home page, you can click the home icon  to return to your home page at anytime.


Procedure

1. Open the workspace you want to set as your new home page.
2. On the application bar, next to the home icon , click the arrow and select **Set Workspace as Home**.

Resetting a home page to the default setting

After you set a home page, you can reset it back to the default IBM Cognos Connection Public Folders view.

Procedure

1. Launch Cognos Connection.
2. Next to the home icon , click the arrow and select **Set View as Home**.

Upgrading IBM Cognos 8 Go! Dashboards

Workspaces created in IBM Cognos 8 Go! Dashboard are upgraded when they are opened in IBM Cognos Business Insight. All of the content is maintained; however, some interactions and layout customization might be lost or changed. The workspace must be saved to be fully upgraded in the content store.

To view workspaces that were created in Go! Dashboard in Business Insight, it is necessary to export the entire content store when deploying the content from the old content store to the new content store. For more information, see the upgrade section in the IBM Cognos Business Intelligence *Installation and Configuration Guide*.

Feature changes

There are some significant changes that you might notice when using an upgraded workspace.

Modes

In Go! Dashboard, Assembly mode was used for creating and formatting workspaces and Interactive mode was used for viewing and interacting with workspaces. In IBM Cognos Business Insight, there are no modes. The same view is used for creating, viewing, and interacting with workspaces.

Portlet upgrade and support

The IBM Cognos Viewer portlet is replaced by the report widget. Content that was displayed in the IBM Cognos Viewer portlet in Go! Dashboard is now displayed in the report widget in Business Insight.

The IBM Cognos Navigator portlet is supported; however, it now displays as a widget. The Navigator widget is not available in the Toolbox tab, although it can still be added to a workspace by dragging a folder from the **Content** tab onto the workspace.

The IBM Cognos Search portlet is also displayed as a widget on upgraded workspaces; however, it is not available in the Toolbox tab. Business Insight has built-in enhanced search and navigation options that allow you to use full-text search to locate content.

The Bookmarks Viewer portlet is supported in Business Insight only for upgrades. If a workspace that was created in Go! Dashboard contains a Bookmarks Viewer portlet and it is opened in Business Insight, the Bookmarks Viewer displays. In Business Insight, you cannot add a Bookmarks Viewer to a workspace.

If a workspace that was created in Go! Dashboard contains IBM Cognos Metric Studio content and it is opened in Business Insight, that content is displayed in a report widget.

The HTML viewer, image viewer, RSS viewer, and rich text portlets are all supported in Business Insight as Web page, image, RSS feed, and text widgets respectively. Some of the configuration properties have changed, though the functionality of each remains the same.

The Slider portlet is replaced by the slider filter widget. Unlike the Slider portlet, the slider filter widget in Business Insight filters report content based on a selected data item. For more information, see “Filter support.”

The Checkbox List portlet has been replaced by the select value filter widget. The select value filter widget allows you to specify the selection style for the filter: check boxes or a list.

In Go! Dashboard, you could modify the following advanced properties for a report to control the behavior of IBM Cognos Viewer portlets on a workspace:

- Fragment action
- Prompt the user
- Prompt values
- Drill down and drill up
- Report-based drill through
- Show toolbar
- Channel

The settings for these properties are not upgraded. These features still exist in Business Insight however, they are handled differently. Use the **Listen for Widget Events** dialog box to select or clear the check boxes beside the events that you want or do not want the widget to receive information from. For more information, see “Widget to widget communication” on page 46.

Filter support

In Go! Dashboard, report content was refined using the Slider and Checkbox List controls. These controls were used to show and hide content based on the selected control settings. In Business Insight, content is filtered using the slider filter and the select value filter widgets. For more information, see “Filtering with slider filter

and select value filter widgets” on page 69.

Layout and style changes

In Go! Dashboard, you could select a predefined template to assist in the layout of your content on the workspace. Business Insight has a free-form layout with guidelines to help align widgets vertically and horizontally. When a workspace that was created in Go! Dashboard is upgraded to Business Insight, the original layout is maintained as much as possible. Business Insight also has two layout actions that assist in sizing the widgets on the workspace. For more information, see “Modifying the workspace layout” on page 48.

In Go! Dashboard, you could apply predefined themes to a workspace. On upgrade to Business Insight, the theme is maintained as much as possible, but a new theme cannot be applied. To make changes to an upgraded workspace that has an applied theme, you can modify the workspace style and widget formatting. For more information, see “Editing the workspace style” on page 49.

Display properties

Properties set at the widget level in Go! Dashboard will not display in Business Insight. However, there is one exception; custom titles set in Go! Dashboard at the widget level will display if the title is set to appear on the widget in Business Insight.

Display properties set at the workspace level are upgraded and display in a Business Insight workspace. However, not all the migrated display properties can be modified in Business Insight.

The following table lists the display properties that can be set in Go! Dashboard and whether the upgraded display properties can be configured in Business Insight.

Display property you can upgrade from Go! Dashboard	Upgraded display property configurable in Business Insight?
Workspace background color	Yes
Workspace padding	No
Workspace background image show	Yes
Workspace background image URL	Yes
Workspace background image position	Yes
Workspace background image repeat	Yes
Widget margin	No
Widget title show	Yes
Widget content background color	Yes

Display property you can upgrade from Go! Dashboard	Upgraded display property configurable in Business Insight?
Widget title font	Yes
Widget title font weight	No
Widget title font size	Yes
Widget title font color	No
Widget title font alignment	No
Widget title font style	No
Widget title font decoration	No
Widget title background color	No
Widget title background image repeat	No
Widget title background image position	No
Widget title background image show	No
Widget title background image URL	No
Widget title border width	Yes
Widget title border color	Yes
Widget title border style	Yes

Upgrade limitations

There are some limitations you might encounter when you use workspaces in IBM Cognos Business Insight that were originally created in IBM Cognos Go! Dashboard.

- Communication between the IBM Cognos Viewer portlet and the IBM Cognos Navigator and IBM Cognos Search portlets in upgraded workspaces is lost. For example, in the upgraded workspace, it is no longer possible to click on a report in IBM Cognos Navigator and have the selected report display in the associated report widget.
- Although the IBM Cognos Viewer portlet is supported in upgraded workspaces as a report widget, some of the original portlet properties are no longer available. Also, if a workspace contains an IBM Cognos Viewer portlet that is not configured to display report content, it is not displayed when the workspace is opened in Business Insight.
- In Business Insight, report parts are displayed in a report widget and visual appearance is slightly different than the Go! Dashboard portlet display. Also, the size of report parts can change when the workspace is upgraded. This is because

the default height of the portlet was 250 pixels in Go! Dashboard. In Business Insight, the height of the report widget is determined by the height of the widget content.

- If you customized the column order or column sizes in a crosstab in Go! Dashboard, the customizations are not maintained when you upgrade to Business Insight. You cannot drag columns to re-size them in Business Insight.
- The original portlet layout properties from Go! Dashboard are not supported for the associated widgets in Business Insight. If portlets were styled individually in Go! Dashboard, when they are upgraded in Business Insight, the corresponding widgets will all have the same appearance.
- Image widgets that use tiling in Go! Dashboard will have the tiling removed when opened in Business Insight.
- IBM Cognos PowerPlay report parts are not supported in Business Insight. If a workspace that contains PowerPlay report parts was created in Go! Dashboard and is opened in Business Insight, the report parts are converted to PowerPlay reports.
- Business Insight slider filters and select value filters do not support Go! Dashboard date or time data items for Checkbox Lists and Sliders. If Checkbox Lists or Sliders with date or time data items are upgraded to Business Insight, users must select new data items in the filter properties.
- Go! Dashboard Slider filters might not upgrade properly to Business Insight slider filters. If you upgrade Go! Dashboard Slider filters, users must select new data items in the slider filter properties.
- In Go! Dashboard, enabling the "enable enhanced user features in saved output versions" option allows report parts to be rendered as saved output. Rendering saved output for report parts is not supported in Business Insight. Instead, Business Insight renders live reports. As a result, a Go! Dashboard report might look different when opened in Business Insight.
- In Go! Dashboard, you could apply styles to change the look and feel of workspaces. The styles had names such as modern, contemporary, corporate, and so on, and when applied, changed the colors and fonts for the user interface. In Business Insight, the user interface is upgraded to one modern and visually attractive style; you can no longer apply styles to the user interface.

Interaction changes

The interactions that are not available in IBM Cognos Business Insight are listed in this section.

- In IBM Cognos Go! Dashboard, all rows of data were displayed for report parts. In Business Insight, the first set of rows for a report part is displayed and you must click the Next button to retrieve the next set of rows. This improves performance. This change is also applicable to saved report part output versions.
- Re-ordering columns in crosstab reports that were authored using relational data is not supported in Business Insight.
- Sorting by value in crosstab reports that were authored using relational data is not supported in Business Insight.
- When report content was refined using the slider or checkbox list, an information bar at the bottom of the IBM Cognos Viewer portlet identified the data that was hidden. In Business Insight, report content is filtered using the slider filter or select value filter widgets, and the filter criteria is now displayed in the information bar at the top of each report object contained within the report.

- PowerPlay reports are supported in Business Insight and are displayed in a PowerPlay widget. When PowerPlay reports are opened in HTML, the PowerPlay toolbar is integrated into the widget toolbar so that PowerPlay actions such as export, calculations, and suppression can be applied to the report content. PowerPlay report content cannot interact with the slider filter and select value filter widgets, and widget to widget communication is not supported.
- IBM Cognos TM1 Cube views and TM1 Websheets are supported in Business Insight. They are displayed in TM1 widgets, and the TM1 icons appear within the widget. There are no TM1 icons on the TM1 widget toolbar. TM1 content cannot interact with the slider filter and select value filter widgets.
- The workspace layout format and behavior saved in Go! Dashboard is maintained as much as possible when a workspace is opened in Business Insight. In Go! Dashboard, portlets would automatically resize themselves to accommodate the content displayed within them. For example, you drill down in a list report and the resulting list is larger than the original list; the portlet containing the list resizes to improve the display. This behavior is maintained in Business Insight until you manually move or resize a widget. After that, a widget does not automatically resize when the size of the report content contained within changes.
- Business Insight reports are always rendered in HTML.
- In Business Insight, the widget styles are applied to all report widgets on a workspace. Individual customized widget styles, such as widget background color, border, or images, are not supported.
- Depending on the type of data you are using, drilling down and back up in Business Insight might result in the addition of more summary rows than the original report had.
- In Go! Dashboard, HTML content positioning was constrained to columns in pre-defined page layouts. In Business Insight, widgets can be positioned anywhere on the workspace and can even overlap.
- The sort and reorder on Go! Dashboard columns might not upgrade to Business Insight. This is especially true if the column names displayed in Go! Dashboard are different from the model names.
- The "Default" chart palette in Go! Dashboard is called "Legacy" in Business Insight.
- When you run a report in PDF format, curly brackets {} and parentheses () no longer stay on the same line as the text before them. For example, **Products(2004)** may now break to a new line between **Products** and **(2004)**.

Chapter 3. Creating workspaces

Create workspaces with IBM Cognos Business Insight to give business users in your organization an integrated Business Intelligence experience that includes collaborative decision making. A workspace allows users to quickly complete a wide variety of tasks such as viewing and interacting with reports and collaborating and sharing information.

When you create an interactive workspace, you are assembling IBM Cognos content. You can also add content from HTML and text sources.

Adding IBM Cognos content

You add IBM Cognos content objects to a workspace by dragging them from the **Content** and **Toolbox** tabs onto the workspace.

Tip: You can use the keyboard shortcut Ctrl+Shift+Enter to add a selected content object. You can also right-click an object to access the context menu.

You can add the following objects to a workspace:

- Reports
- Report parts such as tables and charts
- IBM Cognos PowerPlay reports
- URLs
- Folders
- Prompt controls
- Metric lists and individual metrics
- IBM Cognos TM1 Websheets and TM1 Cube views
- IBM Cognos Real-time Monitoring dashboard objects. For more information, see the IBM Cognos Real-time Monitoring Dashboard *User Guide*.
- IBM Cognos Active Report reports

You can use the enhanced search feature of IBM Cognos Business Insight to find and add relevant content to your workspace. For more information, see “Searching for content” on page 32.

Report content

Report objects are displayed in a report widget. The objects in a report include both full reports and the individual report parts, such as tables (lists and crosstabs) and charts.

If you add a report that contains several report parts to the workspace, all of the parts are displayed in a single report widget, including the report header and footer. Add the individual report part to the workspace if you do not want to view the full report. Report parts usually look better than reports on a workspace because report parts do not display headers or footers in the report widget.


Note: As a best practice, use report parts whenever possible to improve workspace layout and usability.

IBM Cognos Business Insight supports report objects that contain prompts, drill through, and drill up and down.

There are several properties and style settings that you can specify to customize the widget interface. You can also enable interactivity and communication between widgets on the workspace.

Do more with Business Insight Advanced

You can perform advanced editing actions on report content by clicking the do

more button  on the top right corner of the report widget toolbar. The report is opened in IBM Cognos Business Insight Advanced. Within Business Insight Advanced, you can change the report content and apply more advanced sorting, filtering, calculations, and summaries. You can also add a list, crosstab, or chart, and format the report to enhance its appearance. Documenting the options and actions available in Business Insight Advanced is outside the scope of this User Guide. For more information, see the Business Insight Advanced *User Guide*.

Report versions

If there are multiple report output versions saved in HTML format in the content store, you can view the saved report output versions or view the live version of the report. By default, the report displays the latest saved output version. You can also create watch rules based on specific conditions and thresholds for a given report version.

Note: Only report versions saved in HTML format are supported in IBM Cognos Business Insight.

For more information, see “Viewing report versions” on page 84.

Report prompts

A prompt is a report element that asks for parameter values before the report is run. The resulting report content is filtered based on the parameter values.

If a report contains prompts, you might be prompted to select or enter values when you add the report to the workspace, depending on the prompt settings that the report author or system administrator specified.

When you save the workspace, the selected or entered prompt values are also saved as part of the workspace. When you open a workspace that contains prompted report objects, the saved prompt values are used and you are not required to re-enter the prompt values.

If you refresh the workspace or the report widget, the report objects run, and the most recent live data or saved output is retrieved from the content store. You are not required to re-enter any prompt values for any prompted report content. The saved prompt values are used.

You can change the prompt values for report content regardless of the default prompt settings that are specified for the report. The report is run and live data is filtered and returned based on the selected prompt value or values. For more information, see “Changing the prompt values in a report” on page 74.

The **Prompt Again** action is only available on live reports. If you are viewing a saved output version of a report, you must first view the live version of the report before you can access the **Prompt Again** action. For more information, see “Report versions” on page 22.

Tables and charts

You can navigate to the individual report parts (tables and charts) contained within a report object in the **Content** tab.

Report data contained in tables include lists and crosstabs. Lists show detailed information from a database, such as products and customers. A list shows data in tabular format: rows and columns. Each column shows all the values for a data item in the database or a calculation based on data items in the database. The following graphic is an example of a table.

Country	Employee	Bonus %
Australia	Jonathan Applebergh	6.00%
Australia	Catherine Fowlie	6.00%
Australia	Karen Donnelly	4.00%
Australia	Ken Wilson	4.00%
Australia	Thomas Faraday	4.00%
Australia	Susan Davidson	4.00%
Australia	Doris Berger	6.00%
Australia	Dean Campbell	2.00%
Australia	Andrea Samuel	4.00%
Austria	Paul Muller	2.00%
Austria	Leonie Zumwald	6.00%
Austria	Heinrich Schlosser	4.00%
Austria	Ava Anuschek	6.00%
Austria	Raoul Hoffer	4.00%
Austria	Florian Keschmann	2.00%
Austria	Heinz Weber	2.00%
Austria	Ludwig Kellerman	6.00%
Austria	Lutz Kessler	4.00%
Austria	Fabian Tibor	4.00%
Austria	Earnest Wagner	4.00%

Crosstabs also show data in tabular format. However, the values at the intersection points of rows and columns are summarized information rather than detailed information.

Training Crosstab			
Course cost	Expense plan total	Difference	Percent of Plan
GO Americas	331,700	-59,900	1.18058487
GO Accessories	373,600	-49,350	1.13209315
GO Northern Europe	316,100	-4,800	1.01518507
GO Southern Europe	237,700	-14,150	1.05952882
GO Central Europe	399,300	-34,800	1.08715252
GO Asia Pacific	390,200	-39,650	1.10161456

Charts provide a graphical way to present data. For information on the chart formats that are supported in Business Insight, see “Supported chart formats” on page 66.

To change the color palette for charts, see “Change the chart color palette” on page 66.

For detailed information on tables and charts, see the IBM Cognos Report Studio *User Guide*.

You can change the display type for a table to a chart. You can also change a chart to another chart type. For more information, see “Displaying data in lists, crosstabs, and charts” on page 63.

Content contained in report widgets can interact with other report widgets and with IBM Cognos Navigator, slider filter, and select value filter widgets. This allows you to dynamically display, interact with, and filter report content. For more information, see “Configuring widget communication” on page 46.

Metric Studio content

If IBM Cognos Metric Studio is installed and configured as part of your IBM Cognos Business Intelligence environment, you can navigate Metric Studio content in the **Content** tab.

You can add the following Metric Studio content to a workspace:

- Watch lists
- Scorecards
- Strategies
- Metric types
- Individual metrics

You can also navigate the report and other content contained within a metric package. All metric content displays in report widgets.

If you add metric content such as a watch lists, scorecards, strategies or metric types to the workspace, the content is displayed as a list of metrics for the selected item. Each metric in the list has a hyperlink that opens the individual metric in Metric Studio. You cannot change the display type for the list of metrics.

If you add an individual metric to the workspace, historical data for the metric displays. By default, the data appears as a bar chart. For more information, see “Displaying data in lists, crosstabs, and charts” on page 63.

Metric Studio content that is displayed as a report widget can interact with the slider filter and select value filter widgets. For more information, see “Adding a slider filter widget” on page 41 and “Adding a select value filter widget” on page 39.


For detailed information on metrics, see the *Metric Studio User Guide*.

Set report widget properties


After you add a report object to the workspace, you can set the properties for the widget.

Use the properties dialog box to change the widget title and other content properties for report widgets.

Procedure

1. Click the **Widget Actions** button  for the widget, and from the drop-down list, click **Properties**.
2. Set the properties as described in the following tables, and click **OK**.

General property	Description
Widget title	<p>Specifies the title of the widget. If no title is specified, the report name is used.</p> <p>Widget titles are only displayed if you select the Show Titles option in the Widgets tab of the Edit Workspace Style dialog box. By default, widget titles are disabled. For more information, see “Editing the workspace style” on page 49.</p> <p>For information on authoring workspaces for use in multiple languages or locales, see “Creating multilingual workspaces” on page 54.</p>

Content property	Description
Maximum number of rows to show per page	<p>Specifies the maximum number of rows to display per page for tabular reports and report parts. The default value is 20.</p> <p>The Maximum number of rows to show per page property is the only widget property that can be undone by using the undo button .</p>

Content property	Description
Prompt when workspace is opened	Specifies that if workspace reports contain prompts, the prompts run when the workspace starts. If this property is disabled, the prompted reports use the last saved prompt values. By default, prompts are enabled.
Retrieve entire report	Specifies if the entire report loads into memory when the workspace starts. By default, this property is disabled and report data is loaded one page at a time for better workspace performance. This property is only applicable to saved report output versions. For more information, see “Viewing report versions” on page 84.
View report specification	Displays the report specification in XML format. The specification displays in a new browser window. This is useful for debugging reports that do not run properly.
Location	Displays where in the Content tab the report is located. For example, the location might look like the following: Public Folders > Business Insight > Basic Report > List Basic.

Active Report content

You can navigate IBM Cognos Active Report content in the **Content** tab and add Active Report content to the workspace.

The following conditions must be met to add Active Report reports to the workspace:

- Active Report is installed and configured as part of your IBM Cognos Business Intelligence environment
- You have the permissions and capabilities to view and interact with an active report
- The active report must have a saved output. If you try to open an active report that has no saved output, an error message appears. The active report author must save the output of the report before you can view it on a workspace.

The active report widgets listen to each other if the active report author configured the widgets to do so and you have more than one active report widget on a workspace. The widget event in the **Listen for Widget Events** dialog box is enabled by default. For more information, see “Configuring widget communication” on page 46. To disable the communication between active report widgets see, “Disabling widget communication” on page 47.

PowerPlay content

You can navigate IBM Cognos PowerPlay content in the **Content** tab and add PowerPlay reports to the workspace.

The following conditions must be met to view PowerPlay content add PowerPlay reports to the workspace:

- PowerPlay is installed and configured as part of your IBM Cognos Business Intelligence environment
- You have the permissions and capabilities to view and interact with PowerPlay content

Note: PowerPlay report content does not interact with the slider filter and select value filter widgets. Widget to widget communication is also not supported.

Viewing PowerPlay content in HTML

When you drag PowerPlay objects to the workspace, a widget displays the PowerPlay data in HTML format. The PowerPlay widget toolbar contains the toolbar actions that are available in PowerPlay Studio.

The following list contains the available PowerPlay actions:

- Crosstab display
Switch between crosstab and indented crosstab display for the selected PowerPlay report.
- Chart display
Select a chart type to display data graphically.
- Display options
Set report display options, add or edit report titles, view a crosstab and a chart together, and reset report content.
- Swap rows and columns
Exchange the positions of categories in rows and columns.
- Hide and show categories
Selectively show or hide report categories.
- Calculations
Create a calculation that combines rows or columns to obtain a new item.
- Rank categories
Add rank categories to reports to show rank ordinals and compare categories.
- Zero suppression
Avoid displaying categories with zero values.
- 80/20 suppression
Remove rows or columns whose absolute values do not contribute to the top 80% of results.
- Custom exception highlighting
Emphasize specific data.
- Custom subsets
Define subsets of categories based on specified criteria to help you isolate, explore, and analyze specific data elements.
- Drill through
Create drill through definitions to go to and from PowerPlay reports and IBM Cognos BI reports.

For detailed information on PowerPlay reports, see the PowerPlay Studio *User Guide*.

Viewing PowerPlay content as a PDF

You can view PowerPlay reports in a widget on the workspace in PDF format.

Procedure

Right-click the PowerPlay content in the **Content** tab and, from the context menu, select **Insert as > PDF**.

Set the PowerPlay widget title

After you add a PowerPlay object to the workspace, you can set the title for the widget.

About this task

For steps on setting a widget title, see “Set report widget properties” on page 25.

TM1 content

You can access applications developed in IBM Cognos TM1 from within IBM Cognos Business Insight in real time.

You can navigate TM1 content in the **Content** tab and add TM1 reports to the workspace under the following conditions:

- TM1 is installed and configured as part of your IBM Cognos Business Intelligence environment.
- You have the permissions and capabilities to view and interact with TM1 content.

Note: TM1 widgets do not interact with the slider filter and select value filter widgets.

Adding TM1 content to Business Insight

When you drag TM1 objects to the workspace, they display in HTML format in dedicated TM1 Viewer widgets. The TM1 toolbar buttons display on the widget toolbar.

You can add the following TM1 content to the workspace:


- TM1 Websheet
- TM1 Cube view
- IBM Cognos TM1 Contributor

The TM1 Navigation Viewer is incorporated into the navigation in the content pane and is not available as a separate widget.

For detailed information on TM1 Viewers, see the *TM1 Developer Guide*.

TM1 content is located in folders in the content pane. You can add only the individual content objects; you cannot add the TM1 folders to the workspace. There are two folders at the highest level in the tree: **Applications** and **Views**. The Applications folder contains more folders, TM1 Websheet objects, and some TM1 Cube view objects. The Views folder contains TM1 Cubes and TM1 Cube view objects.

If you change the data in a TM1 Cube view or a TM1 Websheet, you can click the


Refresh All button  on the application bar to refresh the data for each TM1 Cube view and TM1 Websheet on the workspace.

Adding TM1 Websheet Viewer widgets:

A Websheet is a spreadsheet with TM1 data that you can view in a web browser.

TM1 Websheet Viewer widgets provide the standard widget actions. For more information on widget actions, see “Widget actions” on page 13.

Procedure

To add a TM1 Websheet Viewer widget, from the **Content** tab, drag content with the TM1 Websheet icon  onto the workspace.


Adding TM1 Cube Viewer widgets:

The TM1 Cube Viewer widget displays a TM1 Cube view.

TM1 Cube Viewer widgets provide the standard widget actions as well as **Reset** and **Restart**. For more information on widget actions, see “Widget actions” on page 13.

Also, TM1 Cube Viewer widgets listen to each other by default. You can disable this communication. For more information, see “Widget to widget communication” on page 46.

Procedure

To add a TM1 Cube Viewer widget, from the **Content** tab, drag content with the TM1 Cube view icon  onto the workspace.

Viewing TM1 Contributor in a widget


TM1 Contributor displays in a Web page widget with a URL that a TM1 administrator specifies to point to a TM1 Contributor Web Client.

The TM1 Contributor object is located under **Public Folders** in the **Content** tab.

Procedure

1. In the **Content** tab, open the **IBM Cognos TM1 Contributor Applications** folder, under **Public Folders**.
2. Drag the TM1 Contributor object onto the workspace.

Results


When you launch TM1 Contributor Web Client within the widget, a return arrow button  in the top right corner provides navigation back to the main page.

For more information on TM1 Contributor, see the TM1 Contributor *User Guide*.

Setting the TM1 widget title

After you add a TM1 object to the workspace, you can set the title for the widget.

Procedure


1. On the widget that you want to set the title for, select the border of the widget to activate the widget toolbar.
2. Click the **Widget Actions** button  for the widget and, from the drop-down list, click **Properties**.
3. Specify a title for the widget and select **Show title on this widget**.
For translated versions of the workspace, you can show this title on the widget for other languages when the widget title is not specified in the other language. To do so, select the **Use title as default for other languages** option.

IBM Cognos Navigator

Use this widget to add a navigation browser that contains a list of links that open published IBM Cognos reports and other entries.

Complete the following steps to add a Navigator widget and to edit the widget properties.

Procedure

1. In the **Content** tab, select a **My Folders** or **Public Folders** object and drag it onto the workspace. The Navigator widget appears.
2. Click the **Widget Actions** button  for the widget, and from the drop-down list, click **Edit Widget**.
3. In the properties dialog box, edit the properties as described in the following table, and click **OK**.

Property	Description
Title	Specifies the title for the widget. You can select the folder name or type the title.
Language	If you choose to type the title, you must also specify the product language in which the title is displayed. You can assign the same title for multiple language versions. For information on authoring workspaces for use in multiple languages or locales, see "Creating multilingual workspaces" on page 54.
Folder	Specifies the top-level location where the navigation begins.

Property	Description
View	<p>Specifies how folders and content objects display in the navigator widget.</p> <p>To show a list of objects, use the Navigator list view. This is the default view.</p> <p>To show objects and detailed information, such as the last modification date, use the Navigator details view. Links open more detailed information about the object.</p> <p>To show URL links and shortcuts in an RSS-type format, use the News list view.</p>
Open links	<p>Specifies how the links in this widget are opened. You can</p> <ul style="list-style-type: none"> • open and navigate the linked entries in a new browser window. This is the default option. • open and navigate the linked entries in a named HTML frame. Type the name or widget type in the provided text box. • open and navigate the linked entries in a destination portlet. Type the channel name as specified in IBM Cognos Viewer.
Navigation links	<p>Specifies whether to maximize the widget view when navigating the folder contents.</p>
Features to expose in the Navigator views	<p>Specifies how the folders and content objects are displayed for the normal and maximized modes in this widget. You can specify a different view for normal and maximized windows.</p> <p>To show or hide the parent entry of the top level folder in the IBM Cognos folder hierarchy, select the Parent in path check box.</p> <p>To show or hide the Actions column for the entries and view the content of container entries in source applications, select the Actions check box.</p> <p>To show or hide the modification date and description of entries in applicable views, select the Additional information check box.</p> <p>To specify in how many columns you want the entries to appear in the details view, select the values from the Number of columns in a details view drop-down lists. The default is 2 for the normal mode view and 4 for the maximized mode view.</p>

Property	Description
Number of entries	Specifies the maximum number of entries to show per navigator page. The menu bar in the widget shows how many entries are available for a folder.
Separators	Specifies whether separators are used in a list view. Tip: To make long lists of entries easier to read, use alternating background colors to separate the entries in the list.

Searching for content

The search provided in IBM Cognos Business Insight allows you to search entries to locate content. This is known as a full-text search and is similar to that found in popular search engines.

Note: Content must be indexed before you perform a search. If searching does not work, contact your system administrator.

Searches are not case-sensitive. For example, "reports" and "Reports" return the same search results.

Searches automatically include word variations. For example, if you enter the word "tent" as the search term, the search results show entries that include "tents" and "tenting". Words that contain "tent", such as "retention", are not included in the results.

The results for searches that use multiple words include entries that include all search terms and entries that contain only one of the search terms. You can use search operators such as +, -, or " " (quotation marks) to modify the default behavior when searching using multiple words.

Only entries for which you have access permissions at the time of the last index update are included in the search results.

Performing a search

When you perform a search, content entries in the index are searched for matching prompts, titles, headings, column names, row names, and other key fields. If a search term matches a specific item on a workspace, the workspace is included in the search results, but the individual item is not.

Search results are ranked according to the search term match relevance.

Search types

There are four types of search that you can perform in Business Insight:

- IBM Cognos results
 - A list of all matching content within the IBM Cognos content store.

There may also be a separate list of suggested results. This shows objects that your system administrator has identified as being relevant to your search terms.

- **Create and explore results**

A list of queries or analyses that can be created dynamically as a result of your search terms.

- **IBM Connections results**

A list of all matching content within the Connections content store.

You will see this option only if collaboration is set up.

- **Related results**

A list of results generated from an external search engine. Depending on the search engine used, these results can be from corporate data or external web sites.

Searching for comments

You can search for comments, otherwise known as annotations, that have been added to reports. When you search for IBM Cognos Business Intelligence content, workspaces containing matching comments are included in the search results.

Suppose you have a "Sales" workspace that includes a report with the following comment: "Sales lower than expected for Toronto branch". The search results for "Toronto" include this workspace in the IBM Cognos results.

Searching for IBM Connections workspace activities

If you have collaboration set up, you see the following items in your search results:

- When you search for IBM Cognos Business Intelligence content, activities connected to a workspace are included (depending on the index and search rules).

For example, if you have an activity named "Toronto sales" that is connected to your "Sales" workspace, the search results for "Toronto" include this workspace in the IBM Cognos results.

- When you search for Connections content, activities connected to a workspace are included (depending on the index and search rules). Additional Connections content that is unrelated to the workspace but contains your search term is also listed here.

Using the previous example, the "Toronto sales" activity connected to your "Sales" workspace is included in the Connections results. If you have an employee list for Toronto stored in Connections, it is also included.

Index and search rules

When you search for IBM Cognos BI content or IBM Connections content, the rules concerning whether workspace activities are listed in the search results depend on the access permissions of the user who indexed the content as well as your own access permissions.

Search for content


You can use the search in IBM Cognos Business Insight to locate content.

You can right-click an item in the search results and open it in a workspace.

If an item is subsequently removed from the content store, it remains in the search results, but its link will be broken.

Complete the following steps to search for content.

Procedure

1. In the **Content** pane, type a term in the search box, and then click the **Search** button .
By default, IBM Cognos results are shown in the results pane.
2. From the result type drop-down list, select the type of search you want to perform.
Entries that match the search criteria and that you have permission to view appear in the results pane.
3. Expand an item to view further details.

Refining IBM Cognos results

You can use filters to refine the results of a search for IBM Cognos BI content.

To prevent long lists of metadata terms, similar terms are grouped together and the root word is shown as a link. You can click the link to show individual terms.

To remove a filter, click the **Any** option for the item. For example, if you have filtered by date, click **Any Date** to show all dates.

If you select a different search type from the **Content** pane, the refine pane automatically closes.

Use the following filters to refine your search results:

- **Result** shows only report parts or hides report parts.
- **Type** shows only specific IBM Cognos Business Intelligence objects.
- **Part** shows only report parts for specific display types.
- **Date** shows only content for specific creation years.
- **Owner** shows only content for specific owners.
- **Metadata** shows only content for specific dimension names used in the IBM Cognos BI objects.

Procedure

1. In the **Content** pane, click **Refine Search**.
2. In the refine pane, refine the results by selecting one or more filters as required.
For each filter you select, the search results change to reflect your selections.
3. To close the refine pane, click **Refine Search**.

Adding tools

Tools are widgets that are available from the **Toolbox** tab in the **Content** pane. You can add tools to a workspace by dragging them from the **Toolbox** tab onto the workspace.

Note: If any tools are missing, this is likely because your system administrator has removed access to them for security reasons.

You can add the following tools to a workspace:

- Images
- My Inbox
- RSS feed
- Select value filter
- Slider filter
- Text
- Web page

Adding an image widget

Use this widget to display an image on the workspace. The image must be a single file that is reachable by a URL. You can also use the image as a link. For example, you can configure the image widget to broadcast a specified URL in the Web page widget or a new browser window when the image is clicked.

The image URL must be added to the trusted domain list as defined in the IBM Cognos Configuration tool. For more information see the IBM Cognos BI *Installation and Configuration Guide* or contact your system administrator.

Procedure

1. In the **Toolbox** tab of the content pane select the **Image** object and drag it onto the workspace.
2. In the properties dialog box, set the properties as described in the following table, and click **OK**.

Property	Description
Image	Specifies the folder location and the filename of the image as a URL. The supported image formats are PNG, GIF, and JPG. Type the URL address for the image using the following format: <i>http://www.my_server.com/path_to_image/image_file_name</i> .
Image size	Specifies the size of the image. You can leave the original size of the image or customize the image by changing its width and height (in pixels).
Alternate text	Type text to be read by screen readers. Alternate text is also displayed if the image is not available. Leave this option blank if you do not want images to contain alternate text.
Target URL	Specifies the web page to display when the image is clicked. Type the appropriate URL address. Leave this option blank if you do not want to display a web page.


Property	Description
Open links	<p>Specifies how the target URL in this widget is displayed. This option only works if a target URL is specified.</p> <p>Broadcast to all widgets is the default option. Use this option to display the URL in the Web page widget. The Web page widget automatically listens to broadcasts from the image widget if this option is selected. If you do not want a Web page widget to receive input from an image widget, you must disable the widget communication in the Web page widget. For more information, see “Disabling widget communication” on page 47.</p> <p>Use In new window to display the URL in a new browser window when the image is clicked.</p>

Adding a My Inbox widget

Use this widget to show an RSS feed of your secure approval requests, ad-hoc tasks, and notification requests from My Inbox in IBM Cognos Connection.

Complete the following steps to add a My Inbox widget to the workspace and to edit the widget properties.

Procedure

- In the **Toolbox** tab, select the **My Inbox** object and drag it onto the workspace.
Tip: Click a task or notification to open it in My Inbox.
- To change the properties of the widget, click the **Widget Actions** button  and click **Properties** from the drop-down list.
- In the **RSS Feed** tab, set the properties as described in the following table, and click **OK**.

Property	Description
URL	<p>Specifies the URL address of the RSS feed link to My Inbox.</p> <p>Note: The URL address is pre-defined and should not be changed.</p>

Property	Description
Options	<p>Specifies the display options for the RSS feed.</p> <p>To include a description of the feed, use the Show details option.</p> <p>To include an image, such as a logo, associated with the feed, use the Show the feed icon option.</p> <p>To separate entries with different background colors to make the entries easier to read, use the Show alternating background option.</p>
Maximum number of entries to display	Specifies the maximum number of feed links to display in the widget. The default value is 5.
Open links	<p>Specifies how the links in the My Inbox widget are opened. You can select Broadcast to all widgets or In new window.</p> <p>Use Broadcast to all widgets to display the feed links in the Web page widget. The Web page widget automatically listens to broadcasts from the My Inbox widget if this option is selected. If you do not want a Web page widget to receive input from the My Inbox widget, you must disable the widget communication in the Web page widget. For more information, see “Disabling widget communication” on page 47.</p> <p>Use In new window to display the linked entries in a new browser window. This is the default option.</p>

Adding an RSS feed widget

Use this widget to show the content of a Real Simple Syndication (RSS) or an Atom news feed that is specified by a URL address.

The RSS or Atom feed URL must be added to the trusted domain list as defined in the IBM Cognos Configuration tool. For more information see the *IBM Cognos BI Installation and Configuration Guide* or contact your system administrator.

Complete the following steps to add an RSS feed widget to the workspace and to edit the widget properties.

Procedure

1. In the **Toolbox** tab, select the **RSS Feed** object and drag it onto the workspace.
2. In the properties dialog box, set the properties as described in the following table, and click **OK**.

Property	Description
<p>URL</p>	<p>Specifies the URL address that identifies the RSS or Atom channel feed. The specified URL must point to a valid RSS or Atom feed and not a web page. For example, a valid RSS feed link opens an XML file, not a web page.</p> <p>The RSS or Atom channel includes a list of links to specific web pages. The links can include a title and a short description of the linked story.</p>
<p>Options</p>	<p>Specifies the display options for the RSS or Atom feed.</p> <p>To include a description of the RSS or Atom feed, use the Show feed details option.</p> <p>To include an image, such as a logo, associated with the RSS or Atom feed, use the Show the feed icon option.</p> <p>To separate entries with different background colors to make the entries easier to read, use the Show alternating background option.</p>
<p>Maximum number of entries to display</p>	<p>Specifies the maximum number of feed links to display in the widget. The default value is 5.</p>
<p>Open links</p>	<p>Specifies how the links in the RSS feed widget are opened. You can select Broadcast to all widgets or In new window.</p> <p>Use Broadcast to all widgets to display the feed links in the Web page widget. If Broadcast to all widgets is selected, the Web page widget automatically listens to broadcasts from the RSS feed widget. If you do not want a Web page widget to receive input from the RSS feed widget, you must disable the widget communication in the Web page widget. For more information, see “Disabling widget communication” on page 47.</p> <p>Note: If you click an image in the RSS feed widget, the image always displays in a new browser window, not in the Web page widget.</p> <p>Use In new window to display the linked entries in a new browser window. This is the default option.</p>

Adding a select value filter widget

You can use the select value filter widget to dynamically filter report data. Use this widget to filter data items, such as product or country and region name or single or multiple text values.

Complete the following steps to add a select value widget to the workspace and set the properties of the widget.

Before you begin

If you add a select value filter widget to a blank workspace or to a workspace that contains widgets that cannot interact with a select value filter widget, no properties are available to set. Click **Cancel** to close the dialog box.

Procedure

1. In the **Toolbox** tab, select the **Select Value Filter** object and drag it onto the workspace.
2. In the properties dialog box, set the properties as described in the following table, and click **OK**.

For more information, see “Widget to widget communication” on page 46.

Property	Description
<p>Select a data item to filter on</p>	<p>Specifies the data items that you can refine. Beside each listed data item, a column identifies the widgets on the workspace that use the data item and the widgets that the select value filter widget will affect.</p> <p>Disabled data items are already listening to a slider filter or select value filter on the workspace. You cannot select the same data item for more than one filter.</p> <p>You might see data items that are not shown in the report; however, you can filter on them. For example, a chart on the workspace shows revenue for regions, but not years. When you add a select value filter, if the report was authored to filter on years when displayed in IBM Cognos Business Insight, you will see years in the filter properties. For more information on enabling filters in reports for workspaces, see the IBM Cognos Report Studio <i>User Guide</i>.</p> <p>Note: If you have disabled the select value filter widget from listening to the data values of a specific data item and you filter on that data item, the data values will not appear in the Select a data item to filter on box. To solve this issue, select a different data item to filter on or enable the select value filter widget to listen to the data values for that data item. For more information, see “Widget to widget communication” on page 46.</p> <p>Tip: Pause the pointer over the widget title to highlight the associated widget on the workspace.</p>
<p>Use only the following values</p>	<p>Specifies the list of values associated with the selected data item. By default, all of the values for the item are selected. Clear the values that you do not want shown in the workspace.</p> <p>After you close the properties dialog box, the values that are filtered on display in the information bar located in the upper-left corner of the report widget.</p>
<p>Number of items that can be selected</p>	<p>Specifies whether you can select single or multiple values in the widget.</p>

Property	Description
Style	Specifies how the values display in the widget. The options that are available depend on whether you selected single or multiple values. If you choose single value for the number of items property, the available options for the style property are list, menu, and radio buttons. The default is radio buttons. If you choose multiple values, the available options are list and check boxes. The default is check boxes.
Show descriptive text	Sets a text description for the widget. You can use this text to provide instructions or details on using the select value filter widget.

Example

For example, your company has three product lines. Your workspace contains several report widgets that list customers, sales, and locations according to these three product lines. This is too much data to suit a workspace. Insert a select value filter widget with radio buttons and view the data for one product line at a time.

Adding a slider filter widget

Use this widget to dynamically filter data in report widgets. Filtering removes unwanted data from a report. For example, using the slider filter, you can retrieve data for revenue that is between 10,000 and 20,000.

Depending on the properties set for the slider filter, content can display as single values or value ranges.

Before you begin

If you add a slider filter to a blank workspace, or to a workspace that contains widgets that cannot interact with the slider filter, no properties are available to set. Click **Cancel** to close the dialog box.

Procedure

1. In the **Toolbox** tab, select the **Slider Filter** object and drag it onto the workspace.
2. In the properties dialog box, set the properties as described in the following table, and click **OK**.

For more information, see “Widget to widget communication” on page 46.

Property	Description
<p>Select a data item to filter on</p>	<p>Specifies the data items on which you can filter. Beside each listed data item, a column identifies the widgets on the workspace that use the data item and that the slider filter will affect.</p> <p>Disabled data items are already listening to a slider filter or select value filter on the workspace. You cannot select the same data item for more than one filter.</p> <p>You might see data items that are not shown in the report; however, you can filter on them. For example, a chart on the workspace shows revenue for regions, but not years. When you add a slider filter, if the report was authored to filter on years when displayed in IBM Cognos Business Insight, you will see years in the filter properties. For more information on enabling filters in reports for workspaces, see the <i>Report Studio User Guide</i>.</p> <p>Note: If you have disabled the select value filter widget from listening to the data values of a specific data item and you filter on that data item, the data values will not appear in the Select a data item to filter on box. To solve this issue, select a different data item to filter on or enable the select value filter widget to listen to the data values for that data item. For more information, see “Widget to widget communication” on page 46.</p> <p>Tip: Pause the pointer over the widget title to highlight the associated widget on the workspace.</p>

Property	Description
Use only the following values	<p>If the data item that is selected is a numeric value, such as quantity or revenue, you can set a range of values to display on the slider filter. The default behavior is to display the lowest to the highest values; however, you can set specific range of values to use. For large or complex reports, lowest value to highest value may display zeros. In this case, enter the lowest to highest values manually.</p> <p>If the data item that is selected is a text value, such as a product, year, or country or region, a list of the values that are associated with the item display. By default, all of the values for the item are selected. Clear the values that you do not want shown in the workspace.</p> <p>After you close the properties dialog box, the values that are filtered on display in the information bar located in the upper-left corner of the report widget.</p>
Style	Specifies if the slider filter operates on a Range of values or a Single value of the selected data item.
Display values as filter labels	Specifies whether to show the values as filter labels on the slider filter scale. If you do not select this option, only the lowest and highest values display. However, the value of the slider filter setting always display in a tooltip above the slider filter pointer.
Show descriptive text	Sets a text description for the widget. You can use this text to provide instructions or details on using the slider filter widget.

Adding a text widget

Use this widget to add text to a workspace.

Complete the following steps to add a text widget to the workspace and to edit the widget properties.

Procedure

1. In the **Toolbox** tab, select the **Text** object and drag it onto the workspace.
2. Enter text, and use the formatting tools available on the toolbar to format the text.

Results

To edit the text, highlight text inside the text widget and make the required changes to the text and formatting.

Adding a web page widget

Use this widget to insert a web page into a workspace. A URL address specifies the web page.

The web page URL must be added to the trusted domain list as defined in the IBM Cognos Configuration tool. For more information, see the IBM Cognos Business Intelligence *Installation and Configuration Guide* or contact your system administrator.

Complete the following steps to add a web page widget and to edit the widget properties.

Procedure

1. In the **Toolbox** tab, select the **Web Page** object and drag it onto the workspace.
2. In the properties dialog box, in the HTML content field, specify the URL address of the web page you want to display, and click **OK**.

Saving workspaces

Save a workspace to preserve your changes. You can also save an existing workspace using a new filename or location as the basis of a new workspace.


When you save a workspace for the first time, a copy of each report widget is created for the saved workspace. After you open and change the report (for example, you apply a sort), the changes are saved in this copy. For information on how to find the original report that was dragged onto the workspace, see “Resetting report content” on page 74. For information on how to update the workspace after the original report is modified, see “Opening a workspace with a new version of a report” on page 74.

The data in a report widget is not saved with the workspace. If the report widget is based on a live report, fresh data is retrieved from the data source when you open the workspace. For more information, see “Viewing report versions” on page 84.

Save a workspace

Save a workspace to preserve your changes.


Procedure

1. Click the save button  on the application bar.
2. If you are saving the workspace for the first time, specify where you want to save the workspace, type a file name, and click **Save**.

Save a workspace using a different name or location

You can save an existing workspace using a new filename or location as the basis of a new workspace.

Procedure

1. On the application bar, click the **Actions Menu** button .
2. Click **Save As**.
3. Specify a file name and location for the workspace, and click **Save**.

Editing widget properties

After you add a widget to a workspace, you can edit the widget properties.

Procedure

1. On the workspace, click the **Widget Actions** button  for the widget, and, from the drop-down list, click **Properties**.

Note: After you add a widget to the workspace, the properties dialog box contains two tabs: a **Title** tab and another content tab, depending on the selected widget.

2. Click the **Title** tab and set the title properties, as described in the table below.

Note: If the widget only contains general properties, no tabs display.

Property	Description
Widget title	<p>Specifies the title of the widget. If no title is specified, the report name is used.</p> <p>For translated versions of the workspace, you can show this title on the widget for other languages when the widget title is not specified in the other language. To do so, select the Use title as default for other languages option.</p> <p>Widget titles are only displayed on widgets if you select the Show Titles option in the Widgets tab of the Edit Workspace Style dialog box or if you selected the Show title on this widget option in the widget properties. By default, widget titles are disabled. For more information, see “Editing the workspace style” on page 49.</p> <p>For information on authoring workspaces for use in multiple languages or locales, see “Creating multilingual workspaces” on page 54.</p>

3. Click the **Content** tab, set the properties, and click **OK**. For descriptions of the widget properties, refer to the appropriate section in the “Adding tools” on page 34 topic.

Note: The text widget only has the **Widget title** property.

Configuring widget communication

Widgets communicate with each other by default. For example, content in report widgets can interact with each other as well as the slider filter and select value filter widgets. The slider filter and select value filter widgets dynamically filter report data that is contained in associated report widgets.

When a widget is broadcasting information, it is a source widget. When a widget is listening to one or more widgets, it is a target widget. The report widget can be both a source and a target at the same time.

The results of actions in the source widgets are shown in the associated target widget. For example, you can configure an image widget to broadcast a specified URL in the Web page widget when the image is clicked. Or, if you have two report widgets that contain content based on the same dimensionally-modelled data source, when you drill on the data in one report, the second report is updated based on your interactions in the first report. For more information, see “Synchronizing drill up and drill down” on page 84.

Communication occurs between the following source and target widgets.

Note: Active Report widgets only communicate with each other and cannot communicate other Report widgets.

Source widget	Target widget
Report	Report
Slider filter	Report
Select value filter	Report
Image	Web page
RSS feed	Web page
My Inbox	Web page

Widget to widget communication

The report, image, RSS feed, and My Inbox widgets automatically broadcast their information to other widgets. The report and Web page widgets listen to the broadcasting widgets.

For more information, see “Report content” on page 21, “Adding an image widget” on page 35, “Adding an RSS feed widget” on page 37, “Adding a My Inbox widget” on page 36, and “Adding a web page widget” on page 44.

Slider filter and select value filter widgets automatically read the data items that are contained in the report widgets on a workspace. You can add multiple slider filter and select value filter widgets to a workspace. Once configured, they broadcast filter information to all associated report widgets. For more information, see “Adding a slider filter widget” on page 41 and “Adding a select value filter widget” on page 39.

Disabling widget communication

If you do not want a target widget to receive information from any or all source widgets, you must disable the communication in the target widget.

You can also choose to disable some widget events while leaving other widget events enabled. For example, you might want a widget to listen to drill events and not listen to prompt events from another widget.


Widget events for some IBM Cognos Business Insight widgets have names, such as **Filter**. Other widgets do not have event names, only unique identifiers. For example, a unique identifier for an event could be `com.ibm.bux.data.filter`.

The following table lists the names of the widget events and a description of what happens when they are disabled.

Widget event name	Type of widget that broadcasts the event	Result of disabling the widget event
Drill	Report	If disabled, communication stops between synchronized drill up and drill down and other widgets.
Prompt	Report	If disabled, communication stops between report prompts in a report and other widgets.
Filter	Slider filter or select value filter	If disabled, communication stops between a report widget and a filter.
Get filter items from widgets	Slider filter or select value filter	If disabled, a report widget will not receive this event from the source (slider or select value) filter. The filterable items of the report do not show up in the filter properties dialog box.
Get filter values from widgets	Slider filter or select value filter	If disabled, a report widget will not receive this event from the source (slider or select value) filter. The data item values of the report do not show up in the filter properties dialog box.
Include data items from widget	Report	If disabled in a slider or select value filter, the filter will not listen to this event. The filterable data items from the source report will no longer display in the filter properties dialog box.

Widget event name	Type of widget that broadcasts the event	Result of disabling the widget event
Include data values from widget	Report	If disabled in a slider or select value filter, the filter will not listen to this event. The filterable data values from the source report will no longer display in the filter properties dialog box.
Navigate	RSS Feed, My Inbox, and Image	If disabled, communication stops between a Web Page widget and RSS Feed, My Inbox, or Image widget.

Procedure

1. Select the target widget.
2. Click the **Widget Actions** button  for the widget and click **Listen for Widget Events**.
3. In the **Listen for Widget Events** dialog box, clear the check boxes beside the source widget names or widget events that you do not want the target widget to receive information from, and click **OK**.

Tip: To see all the widget events that the widget is listening to, click **Expand All**.


Modifying the workspace layout

When you place a widget on the workspace, the widget is automatically sized to fit its content. As you interact with the widget, the content might change and the widget will not be resized to properly display the content. This results in either scrollbars or white space in the widget.

Resize individual widgets

You can resize widgets to fit content.

Procedure

1. On the widget toolbar for the widget you want to resize, click the widget **Actions Menu** button .
2. Click **Resize to Fit Content**.

Set the workspace layout

You can modify the layout of the widgets on a workspace.

As widgets are added, moved, manipulated, and removed, the layout of the workspace might need to be corrected. IBM Cognos Business Insight provides the following layout actions that automatically arrange widgets on the workspace.


- **Fit All Widgets to Window**

This layout action resizes all the widgets on the workspace to fit into the current workspace window. Scroll bars might appear on the individual widgets, depending on the number and size of the widgets. Widgets are resized proportionally; all of the widget resizing is done relative to the other widgets on the workspace.

- **Arrange All Widgets to Fit Content**

This layout action arranges all the widgets on the workspace to best fit the content of each widget. Scroll bars might appear on the workspace, depending on the number and size of the widgets. Widgets are repositioned after resizing to prevent overlapping on the workspace.

Procedure

1. Click the **Layout and Style** menu button  on the application bar.
2. From the drop-down list, click either **Fit All Widgets to Window** or **Arrange All Widgets to Fit Content**.

Results

The widgets are rearranged on the workspace according the layout action you select.

Editing the workspace style

You can change the visual appearance of the workspace and widgets to customize the look of your workspace.

For the workspace, you can change the appearance of the background.


For workspace widgets, you can change the appearance of the background, border, and title bar. Widget customizations are applied to all widgets on the workspace.

Edit the workspace style

You can change the visual appearance of the workspace.

Complete the following steps to set style properties for a workspace.

Procedure

1. On the application bar, click the **Layout and Style** menu button  and click **Edit Workspace Style**.

Tip: You can right-click a blank area on the workspace to access the **Edit Workspace Style** option from the context menu. You can also select the option from the workspace **Actions Menu**.

2. Click the **Page** tab.
3. Set the properties, as described in the following table, and click **OK**.


Property	Description
<p>Background</p>	<p>Specifies the workspace background. Note: The background image URL must be added to the trusted domain list as defined in the IBM Cognos Configuration tool. For more information see the IBM Cognos BI <i>Installation and Configuration Guide</i> or contact your system administrator.</p> <p>The options for background are as follows:</p> <ul style="list-style-type: none"> • Color <p>The default is a very light blue-gray. To change the background color, click Set Color from the color list. In the Set Color dialog box, you can choose from the following two tabs:</p> <ul style="list-style-type: none"> – Palette <p>Use the Palette tab to choose a color from the predefined palette.</p> – Custom <p>Use the Custom tab to set specific colors.</p> • Image <p>The default is to display no background image. To display a background image, select Set Image from the image list. In the Set Image dialog box, set the properties for the image, and click OK. The properties you can set are as follows:</p> <ul style="list-style-type: none"> – Image <p>The URL of the image.</p> – Tiling <p>The tiling options for the image.</p> – Position <p>The alignment position options for the image.</p>
<p>Reset to default</p>	<p>Resets the workspace page style properties to the initial default settings.</p>

Edit all workspace widgets

You can change the appearance of all the workspace widgets at the same time.

Complete the following steps to set style properties globally for all widgets.

Procedure

1. On the application bar, click the **Layout and Style** menu button  and click **Edit Workspace Style**.
2. Click the **Widgets** tab.
3. Set the properties, as described in the following table, and click **OK**.

Property	Description
<p>Background</p>	<p>Specifies the background for the workspace widgets.</p> <p>The options for background are as follows:</p> <ul style="list-style-type: none"> • Color <p>The default is white. To change the background color, click Set Color from the color list. In the Set Color dialog box, you can choose from the following two tabs:</p> <ul style="list-style-type: none"> – Palette <p>Use the Palette tab to choose a color from the predefined palette.</p> – Custom <p>Use the Custom tab to set specific colors.</p> • Image <p>The default is to display no background image. To display a background image, select Set Image from the image list. In the Set Image dialog box, set the properties for the image, and click OK. The properties you can set are as follows:</p> <ul style="list-style-type: none"> – Image <p>The URL of the image.</p> – Tiling <p>The tiling options for the image.</p> – Position <p>The alignment position options for the image.</p>
<p>Show Titles</p>	<p>Specifies to show or hide the title bar. The default is to hide the title bar.</p> <p>You can also specify the title bar font.</p> <p>The options are as follows:</p> <ul style="list-style-type: none"> • Font • Size


Property	Description
Borders	<p>Specifies to show or hide widget borders.</p> <p>You can also specify the widget borders formatting.</p> <p>The options are as follows:</p> <ul style="list-style-type: none"> • Border <ul style="list-style-type: none"> – Outside only – Outside and under the title – Under the title only <p>The default is Outside only.</p> • Width <p>The border width in pixels. The default is 1 pixel.</p> • Color <p>The default is light gray. To change the border color, click Set Color from the color list. In the Color dialog box, you can choose from the following two tabs:</p> <ul style="list-style-type: none"> – Palette <p>Use the Palette tab to choose a color from the predefined palette.</p> – Custom <p>Use the Custom tab to set specific colors.</p> • Style <ul style="list-style-type: none"> – Dashed – Dotted – Double – Groove – Inset – Outset – Ridge – Solid <p>The default is Solid.</p>
Reset to default	Resets the widget style properties to the initial default settings.

Setting personal preferences

You can personalize the way data appears in IBM Cognos Business Insight by changing your preferences. For example, you can set the product language and the preferred output format of reports.

Changes take effect in the current session when the web browser is refreshed. The preferences are stored and used for future sessions unless you change them.

Procedure

1. On the application bar, click the **Actions Menu** button  and click **My Preferences**.
2. In the **Set Preferences** dialog box, select the appropriate settings as described in the following table, and click **OK**.

Setting	Description
Enable accessibility support for reports	Determines if accessible report output is generated. For more information, see "Making reports accessible to users with disabilities" on page 83.
Show the Getting Started Page at startup	Shows or hides the Getting Started page when you launch Business Insight.
Product language	Specifies the language that the IBM Cognos user interface uses. It applies to all IBM Cognos components, such as IBM Cognos Connection, IBM Cognos Viewer, and IBM Cognos Report Studio. For information on authoring workspaces for use in multiple languages or locales, see "Creating multilingual workspaces" on page 54.
Content language	Specifies the language used to view and produce content in IBM Cognos, such as names and descriptions of entries, or data in reports.
Time zone	Specifies the time zone used. Select the default server time zone set by your administrator. For more information, see the IBM Cognos Business Intelligence <i>Installation and Configuration Guide</i> . Or you can select another time zone. Note: The time zone for time stamps on comments is based on this setting.

Creating accessible workspaces

Creating accessible workspaces ensures access to information for all users, with all levels of ability.

For example, people with a visual impairment might use screen reading technology to access the information in a report.

The following are some design considerations for creating accessible workspaces:

- Use IBM Cognos report content that was created using accessibility principles.
- Avoid using visual cues, such as bold text or color, to convey important information.

- Avoid using pictures and OLE Objects, as these items are tagged as artifacts and ignored by the screen reader.
- Avoid using conditional formatting to convey important information.
- Ensure that there is a table corresponding to display types that are rendered as images because the screen reader ignores this information.
- Always ensure that there is a title on the widget or workspace.
- Understand how screen reading technology works so you can create workspaces that are properly read by screen readers.
- Avoid spelling and grammar errors, as they cause the screen reading software to misinterpret the information.
- Avoid using features like calendar boxes and up and down selections on time controls. Using prompts such as check boxes, radio buttons, combo boxes, and multi-select boxes is acceptable.
- Ensure that the target application is accessible when using embedded web applications or drill-through paths.
- Avoid using large, complex tables. Displaying the information in multiple simple tabular reports is more manageable for users of assistive technology.

IBM Cognos Business Insight has accessibility features that help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products successfully. For more information, see “Accessibility features in IBM Cognos Business Insight” on page 109.

Creating multilingual workspaces

In IBM Cognos Business Insight, you can create a single workspace that users can consume in multiple languages or locales. This is also called localizing your workspace.

Your workspace can include both content from a data source and widget content, such as titles and images, that you manually added.

Data content, such as reports, can come from many different data sources, some of which are unilingual and some of which are multi-lingual. Report authors and modelers can use different techniques to localize their report contents.

You can localize the following categories of widget content:

- Fixed content, such as titles, static text, images, and web page references.
- Filter content, such as sliders and select value filters, as well as filters added in the report widget.
- Other report content, such as list column headings and calculation names.

Some widgets contain only one type of content. For example, a text widget contains only fixed content. Other widgets can contain more than one type of content. For example, a report widget contains all three types of content.

When you add a widget to a workspace, the initial content in the widget determines the default for all languages and locales until it is changed for a particular language or locale. For example, if you author the initial workspace object in French, the content in all other languages and locales is in French until you customize it.

As a workspace author, you must do some initial configuration work to localize the workspace. After you have configured the workspace for the required languages and locales, a workspace consumer using that language and locale should not need to do any further configuration work. They will see the content that you localized in their preferred language and locale.

Procedure

1. Create the new workspace object in an initial language and locale.
2. Save the workspace.
3. Change the content locale of the workspace to a new locale.
4. Modify or configure the workspace object for the new locale and resave the workspace for each locale.

You can modify fixed content, filter content, and report content. Saving after each locale change updates the locale-specific information in the workspace.

Language and locale

IBM Cognos Business Insight allows you to create different content in the same widget at both the language and locale level.

The locale, or regional designation, allows you to distinguish between different regional dialects of a single language. For example, the French language has the locales French (France) and French (Canada).

If you create content at the default language level, for example, by choosing the French locale, that content becomes the default for all the locales within the French language.

You override the default language by creating new content for a specific locale.

The following table shows examples of widget content affected by language differences.

Widget content	Example
Maps	An image or Web page widget shows a map of the area around a store. You localize the image file or URL to show the street names in the workspace consumer's language.
Company logos	A company logo might include text that is different for each language.

The following table shows examples of widget content affected by locale differences.


Widget content	Example
Maps	For a retail chain with stores in Canada, USA, and the UK (all English-speaking countries and regions), the locale will affect which map is shown.




Widget content	Example
Flags	An image in the workspace might contain a country's or region's flag.
Currency	The reported currency might be different and text on the workspace might indicate "values reported in US Dollars" or "values reported in Euros".


Localize fixed content

After you have created and saved the workspace in the initial language, you can switch to the new locale and modify fixed content such as text, images, and URLs.

Procedure

1. On the application bar, click the **Actions Menu** button  and click **My Preferences**.
2. Under **Regional options**, select the new **Content language**.
3. Modify the widget content as shown in the following table, and save the workspace.

Fixed content	Action
Text widgets	Change the current text to the desired text for the new language or locale.
Widget titles	<p>Click the Widget Actions button  and click Properties.</p> <p>On the Title tab, under Widget title, edit the title text.</p> <p>These steps apply to any type of widget.</p>
Descriptive text for slider and select value filters	<p>Click the Widget Actions button  and click Properties.</p> <p>On the Filter tab, edit the text in the Show descriptive text.</p>
Images and Web pages	<p>Click the Widget Actions button  and click Properties.</p> <p>For images, on the Image tab, edit the image URL, Alternate text, and Target URL.</p> <p>For web pages, on the Web Page tab, edit the URL for the language or locale.</p>

Fixed content	Action
RSS feeds	Click the Widget Actions button  and click Properties . On the RSS Feed tab, edit the URL for the language or locale.

Localize filter content

In some cases, slider and select value filters might correctly filter the data for a new locale, it is best to configure these filters when you create a new locale for a workspace.

Without proper configuration, you might encounter some of the following problems when filtering across locales:

- The data might be filtered correctly but the information bar shows values in the wrong language.
- The data might be unfiltered.
- The data might be completely filtered out and the information bar shows values in the wrong language.
- Numeric formats or ranges might not be appropriate for the new locale. For example, a range in dollars is not the same as a range in Euros.

Procedure

1. On the application bar, click the Actions Menu button and click **My Preferences**.
2. Under **Regional options**, select the new **Content language**.
3. Modify the widget content as shown in the following table, and save the workspace.

Filter content	Action
Text slider and select value filter widgets	<p>Click the Widget Actions button  and click Properties.</p> <p>On the Filter tab, select the items to filter for this locale. Depending on how your data was modeled, the same item might apply to all locales or different items might apply to different locales.</p> <p>For filters that use numeric data items with number formats or currencies, configure the data items for each language or locale even when similar values apply.</p> <p>Note: Once configured, data items selected for slider and select value filters are independent for each language and locale. For example, data items selected for English Canada do not affect data items selected for other languages and locales.</p>
Filters in report widgets	<p>Filters created with the filter button  in a report widget are tied to a locale. When you select a new locale, filters created in any other locale are disabled. You must create and save filters for each locale.</p> <p>Note: Filters created outside of Business Insight, in an authoring studio, and in IBM Cognos Business Insight Advanced are global. This means that they are not tied to a locale. Depending on the data, they might work correctly or might exhibit some of the problems for multilingual filters listed above.</p>

Localize report content


You can edit reports to make them multilingual.

In IBM Cognos Business Insight, you can make some limited changes to the following column and row headings in reports:

- Regular list column headings
- Calculated list column headings
- Summary rows or column headings in a crosstab
- Crosstab measures
- Crosstab calculations
- Crosstab single members (only for dimensional reports)

The amount of editing that you can do to a report to make it multilingual is limited in Business Insight. However, if a report was authored to be multilingual or is against a multilingual data source, much of the content is automatically localized.

Procedure

1. On the application bar, click the **Actions Menu** button  and click **My Preferences**.
2. Under **Regional options**, select the new **Content language**.
3. In the report widget, double-click the report item and type a value for the new language or locale.
4. Save the workspace.

Prompt controls

In certain applications, prompt controls and global prompts can be used successfully in multilingual workspaces.

However, because prompt controls tend to be tied to specific data sources by nature, they should be used as follows for multilingual workspaces:

- Created to use key items by advanced authors.
- Restricted to sets of widgets that use a specific data source, where keys are consistent.

Chapter 4. Viewing and interacting with workspaces

You can view and interact with IBM Cognos Business Insight workspaces for an integrated business intelligence experience. As you monitor reports and perform analysis, you can also collaborate and share information with colleagues.

The content that you can see in a workspace depends on your security permissions. If you do not have permission to view report content in a workspace, you will receive a message stating that you do not have permission to view the report.

When you interact with workspace content, such as reports and report parts, the changes you make are saved as part of the workspace, even if you make the changes in Business Insight Advanced. The changes do not affect the original report content that is saved in the content store. To make changes to the original report content, you must open the report in the studio it was authored in.

Opening a workspace

You can open an existing workspace from the Getting Started page, the application bar, the Actions menu, the Content tab, or IBM Cognos Connection.

Open a workspace from the Getting Started page

You can open a workspace from the Getting Started page.


Procedure

1. On the Getting Started page, click **Open Existing**.
2. Select the workspace you want to open and click **Open**.

Open a workspace from the application bar

You can open a workspace from the application bar.


Procedure

1. In the application bar, click the **Open** button .
2. Select the workspace you want to open and click **Open**.

Open a workspace from the Actions menu

You can open a workspace from the Actions menu.

Procedure

1. On the workspace, click the **Actions Menu** button  and click **Open**.
2. Select the workspace you want to open and click **Open**.

Open a workspace from the Content tab

You can open a workspace from the Content tab.

Procedure

1. In the **Content** tab, select the workspace to open.
2. Right-click and, from the context menu, select **Open**.

Open a workspace from IBM Cognos Connection

You can open a workspace from IBM Cognos Connection.

Procedure

1. In IBM Cognos Connection, navigate to the workspace you want to open.
2. Click the hyperlink name of an existing workspace.
The selected workspace opens in the IBM Cognos Business Insight application.

Refreshing workspace widgets


You can refresh live data in all report widgets on a workspace, or in individual widgets. Saved report versions do not have the option to refresh.

If you refresh or reload the workspace from the web browser, you will be prompted to save the workspace if it has not been previously saved, or if you have made changes since the last save.

Refresh all widgets

You can refresh live data in all report widgets on a workspace at the same time.

Procedure

On the workspace application bar, click the **Refresh All** button .


Results

The data in all report widgets on the workspace is refreshed. For widgets that contain prompted report data, the last saved prompt value is used for the refresh action. The time stamp for the report data is updated to the time of the refresh.

Refresh a single widget

You can refresh live data in an individual widget.

Procedure

1. On the widget toolbar for the widget you want to refresh, click the widget **Actions Menu** button .
2. Click **Refresh**.

Results


If the widget contains prompted report data, the last selected or entered prompt value is used for the refresh action. The time stamp for the report data is updated to the time of the refresh.

Sharing workspaces

You can share a workspace with your colleagues by sending a URL to the workspace in an email or by copying and pasting the URL into another document or instant message.

The recipients of the shared workspace URL must have permission to view workspaces, otherwise they cannot access it.

Procedure

1. Open the workspace that you want to share.
2. Click the **Actions Menu** button  on the workspace application bar.
3. Select **Email Link** or **Copy Link to Clipboard**.

Note: You are prompted to save the workspace if it has not been previously saved.

If you select to email the link to the workspace, your default email client will open with a new message that is populated with the workspace name in the subject line and the link to the workspace in the message body.

Note: If IBM Lotus Notes® is the default email client, you must use version 7.0.4 or later to avoid truncation of the link in the body of the email.

If you select to copy the workspace link and you are using Microsoft Internet Explorer, the URL is copied directly to the operating system clipboard. If you are using Mozilla Firefox, the URL is displayed in the **Copy Link to Clipboard** dialog and it is selected by default. Type Ctrl+C on the keyboard to copy the URL to the operating system clipboard.

Note: Depending on the web browser you use, you might have to grant access to the clipboard.


Displaying data in lists, crosstabs, and charts

After a report or report part has been added to the workspace, you can change the display type for that item. For example, you can convert a column chart into a bar chart.

Change the display type

You can change the display type for reports and report parts.

Procedure


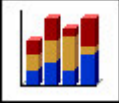

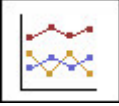


1. Select the report widget and, from the widget toolbar, click the **Change Display Type** button . If the widget contains a report with more than one report part, select the report part and click the **Change Display Type** button.

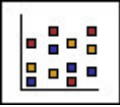

Tip: You can also right-click the report object and click **Change Display Type** from the context menu.

2. From the drop-down list, select a display type or click **More** to show additional display types.
3. In the **Change Display** dialog box, click the display type that you want to use, and click **OK**.

Results

The supported display types are described in the following table.

Display type	Description
 <p>Table</p>	<p>Displays data in rows and columns (crosstab) or in columns (list table).</p>
 <p>Column</p>	<p>Displays data as vertical markers to compare individual values and is useful to compare discrete data or to show trends over time.</p> <p>Column charts can plot data using standard, stacked, 100 percent stacked, and three-dimensional configurations.</p>
 <p>Bar</p>	<p>Displays data as horizontal markers to compare individual values and is useful for showing trends over time and for charts that plot many data series.</p> <p>Bar charts can plot data using standard, stacked, 100 percent stacked, and three-dimensional configurations.</p>
 <p>Line</p>	<p>Displays data at regular points connected by lines and is useful for showing trends over time and for charts with many data series.</p> <p>Line charts can plot data using standard, stacked, 100 percent stacked, and three-dimensional configurations.</p>
 <p>Pie, Donut</p>	<p>Displays a single data series as segments of a circle to show the relationship of parts to the whole and is useful for highlighting proportions.</p> <p>Pie charts can plot data using standard, donut, and three-dimensional configurations.</p>
 <p>Area</p>	<p>Displays data like a line chart but the areas below the lines are filled with colors or patterns. An area chart is useful for emphasizing the magnitude of change over time. A stacked area chart is useful for showing the relationship of parts to the whole.</p> <p>An area chart can plot data using standard, stacked, 100 percent stacked, and three-dimensional configurations.</p>

Display type	Description
 <p data-bbox="597 352 829 380">Scatter, Bubble, Point</p>	<p data-bbox="967 268 1445 411">A scatter chart uses data points to plot two measures anywhere along a scale, not only at regular tick marks, and is useful for exploring correlations between different sets of data.</p> <p data-bbox="967 438 1445 611">A bubble chart, like a scatter chart, uses data points and bubbles to plot measures anywhere along a scale. The size of the bubble represents a third measure, and the color represents a fourth measure. It is useful for representing financial data.</p> <p data-bbox="967 638 1445 863">A point chart uses multiple points to plot data along an ordinal axis. It is the same as a line chart without the lines. Only the data points are shown. A point chart is useful for showing quantitative data in an uncluttered fashion. To display a point chart, the report object must contain at least one measure (numeric value).</p>
 <p data-bbox="597 989 667 1016">Gauge</p>	<p data-bbox="967 905 1430 1020">Displays data using needles to show information as a reading on a dial. The value for each needle is easily read against the colored data range.</p> <p data-bbox="967 1047 1445 1163">A gauge chart is useful for comparing values between a small number of variables, either by using multiple needles on the same gauge or by using multiple gauges.</p>

Choose a display type and configuration for charts

Before choosing a display type, consider what you want the chart to illustrate. Different display types and configurations emphasize different things.

Purpose	Display type or configuration
Show contributions of parts to a whole	Pie Stacked configuration 100 percent stacked configuration
Show trends in time or contrast values across different categories	Line Area Bar Column
Compare groups of related information against actual values	Standard configuration Three-dimensional

Purpose	Display type or configuration
Compare different kinds of quantitative information	Column-line

Supported chart formats

IBM Cognos Business Insight supports two chart formats: default charts, and legacy charts. The default chart format is specified by your system administrator. A chart is displayed in Business Insight in the format it was authored in, either default chart or legacy chart.

The default charts display format is used when you author charts in the current version of IBM Cognos Report Studio and IBM Cognos Business Insight Advanced. Charts authored in previous versions of Report Studio use the legacy chart format. For more information about default and legacy charts, see the IBM Cognos Report Studio *User Guide* or IBM Cognos Business Insight Advanced *User Guide*.

Sort and filter chart content

You can sort and filter chart content in reports.

If a filter or sort is applied to data in a table report that is changed to a chart, the information bar displays the filter and sort information in the chart. However, it is not possible to filter on chart data in the report widget by using the filter actions from the report widget toolbar or context menu.


Procedure

To filter chart data, use the slider filter and select value filter widgets. For more information see “Filtering with slider filter and select value filter widgets” on page 69.

Change the chart color palette

You can change the color palette for a chart on the workspace.

Procedure

1. Select the report widget that contains the chart that you want to change the color palette for and click the chart you want to change.
2. On the toolbar, click the **Change Color Palette** button  and click the color palette from the drop-down list.

Results

The chart is displayed with the new color palette.


Swap rows and columns

Swap rows and columns to look at information from a different perspective.

This may help you discover high and low points in the data that you had not previously noted.

You can only swap rows and columns in a crosstab or chart. In a chart, you swap the items on the legend with the items on the x-axis.

Procedure

1. If the widget contains more than one report, select the report that you want to swap rows and columns on.
2. From the widget toolbar, click the swap rows and columns button .

Results

For a crosstab report, the rows become the columns and the columns become the rows. For a chart, the items on the legend become the items on the x-axis and the items on the x-axis become the items on the legend.

Filtering report data

Filtering removes unwanted data from a report. Data is retrieved from the database and displayed in the report only if it meets the filter criteria.

In addition to prompts, report data in a workspace can also be filtered in the following ways. You can use the filter action in the individual report widgets, or you can use a slider filter or select value filter widget to filter one or more reports at the same time.

The filter information is displayed in the information bar in the report widget.

Filtering in the report widget

Non-numeric values, such as "sleeping bag" or "tent", in lists and crosstabs are filtered by using **Include** and **Exclude** conditions. In lists, you can select multiple non-numeric values within the same column to filter on. In crosstabs, you can select multiple non-numeric values in column or row headings. If you select multiple values, they are all included in the filter condition.


When single values of numeric items, such as quantity or revenue, are selected, lists and crosstabs can be filtered by using value comparison filters such as "greater than" or "less than". If two numeric values are selected, the following filter conditions are available:

- **Between**
- **Not between**

If the widget contains a compound report, which is a report that contains multiple report parts, such as a list and a crosstab, the filter behavior depends on whether the report parts share the same query. If the query is shared, a filter applied to one report part is also applied to the other report part. If the query is not shared, the filter is applied only to the selected report part within the report widget.

If you filter a report, then subsequently remove the column or row that the filter was created on, the filter is still applied to the remaining report. For example, if you have a list report with a column that contains country or region values, and you select to filter "In Austria and Australia", the resulting report contains content that is related to the selected countries or regions. If you then delete the Country or Region column, the filter is still applied to the remaining columns.

If you filter values that are floating-point numbers, you might encounter imprecise filtering results due to rounding or data truncation. Floating-point numbers can appear differently in the report than how they are stored in the data source. For example, you want to filter a column in a table to show all values that are less than 2.51. The value 2.51 might display even after you apply the filter because in this scenario, 2.51 is a floating-point number; it is stored as 2.50999999 in the underlying binary format. To ensure accurate results, your filter criteria should account for any rounding issues.


To apply more detailed filtering to the report, click the **Do More** button  to open the report in IBM Cognos Business Insight Advanced. For more information, see the IBM Cognos Business Insight Advanced *User Guide*.

Note: To use the **Do More** options, Business Insight Advanced must be installed in your environment and you must have the appropriate permissions. If you cannot access Business Insight Advanced, contact your system administrator for assistance.

Filter report data

You can use the filter action in the individual report widgets to filter report data.

Procedure



1. Within a report, click the data value or values on which you want to filter.
2. On the toolbar, click the filter button  or click the filter item in the context menu.
3. Select a filter condition from the list.
The filter is applied to the report. The filter details are displayed in the information bar.

Remove individual filters using the information bar


You can use the information bar to remove filters from reports.


When the information bar is expanded, a delete icon appears beside the filters you can remove.

Procedure

1. In the widget information bar, click the expand button  to display all of the applied filters.
2. Click the delete button  beside the filter you want to remove.

Only filter conditions applied using the following methods can be removed from the information bar:


- The filter button 
- The filter context menu
- The slider filter
- The select value filter

If a filter condition appears in grey or it has a lock icon , the filter cannot be removed from the information bar.


For more information, see “Displaying filter and sort values in the information bar” on page 72.

Remove all filters in a report widget

You can remove all the filters for a widget.

This action removes only the filter conditions that were applied by using the filter button  or filter context menu in the report widget. Filters applied in IBM Cognos Analysis Studio, IBM Cognos Query Studio, or IBM Cognos Report Studio are not removed. Also, filters applied by prompt values or the slider filter or select value filter widgets are not removed.

Procedure

1. On the widget toolbar, click the filter button .
2. To remove all the filters in your report, click **Remove all filters for this widget**.

Filtering with slider filter and select value filter widgets

If the workspace contains a slider filter or a select value filter widget, you can use it to filter table and chart data in the report widgets it communicates with.

Procedure

To use the slider filter widget to filter data, click and drag the range slider filter to display or remove data items. To use the select value filter widget to filter data, select or deselect the data items you want to display or remove, and click **Apply**.

Results

The report widgets that are communicating with the slider filter or select value filter widget, will refresh to display the filtered data items you have selected.

The filter information is displayed in the information bar and it is updated as the filter conditions are changed.

For more information see “Adding a slider filter widget” on page 41, “Adding a select value filter widget” on page 39, and “Configuring widget communication” on page 46.

Sorting data in lists, crosstabs, and charts

Sorting organizes your data in either ascending or descending alphabetical or numerical order. For example, you can sort on a column that lists product sales values in descending order to order product sales from the highest to the lowest.


In IBM Cognos Business Insight, you can sort lists, crosstabs, and charts. When a sort is applied, the details of the sort are displayed in an information bar.

Sorting lists

You can sort items in a list report in ascending or descending order based on an alphabetical or numeric value, such as employee name or revenue.

The information bar indicates the value or caption the sort was based on and whether the direction of the sort is ascending or descending.

Procedure

1. Within a list report, select a column to sort.
2. Click the sort button  and click **Sort Ascending** or **Sort Descending**.

Tip: You can also pause the pointer over the column heading and click on the up or down arrow to sort in ascending or descending order.

Results

An arrow appears beside the data item to indicate the sort order.

Sorting crosstabs

You can sort items in a crosstab in ascending or descending order based on a label or numeric value.

If sorting was applied to a crosstab report in IBM Cognos Report Studio, IBM Cognos Business Insight Advanced, or IBM Cognos Query Studio, the sort information is displayed in the information bar in the report widget. However, if sorting was applied in IBM Cognos Analysis Studio, the sort information is not displayed in the information bar.


The information bar indicates whether the sort was by label or value and whether it is in ascending or descending order.

Note: Sorting in crosstab report objects is not maintained for IBM Cognos 8 Go! Dashboard workspaces when upgrading to IBM Cognos Business Insight.

Sorting by label


You can sort sets of crosstab row and column headings based on their labels and groupings.

A set can be defined as the values that are associated with a specific data item. For example, if the data item "region" is used for the rows in a crosstab, the set of values includes all of the values contained in region, such as "Europe", "North America" and "Asia".

Using this example, if you select one of the values in the region set, click the sort button , and sort the regions within the set in descending alphabetical order, the rows within the crosstab are reorganized in the following order: North America, Europe, Asia.

Sorting by label is available in crosstabs when a set is selected. Sorting by label is not available for summary rows or columns, nested measures, calculations, or rows and columns based on single dimensional members.


Procedure

1. Within a crosstab, select a set of values to sort.
2. Click the sort button  and click **Sort By Label - Ascending** or **Sort By Label - Descending**.

Sorting by value

Sorting by value is available in dimensional crosstabs when a column or row heading is selected. Sorting by value is not supported on the outer edges of a nested crosstab, or in relational crosstabs.

Sorting by value affects the measure values for a given row or column. For example, a crosstab contains an "expense plan total" value in a column, region values in the rows, and "course cost" as the measure. You select "expense plan

total", click the sort button  and sort by value in descending order. The revenue values in the "expense plan total" column are sorted in descending order.

Course cost	Expense plan total	Difference	Percent of Plan
GO Central Europe	399,300	-34,800	1.0871525
GO Asia Pacific	390,200	-39,650	1.1016145
GO Accessories	373,600	-49,350	1.1320931
GO Americas	331,700	-59,900	1.1805848

In nested crosstabs, items are sorted based on the values of the innermost nested row or column of the opposite axis. For example, a crosstab contains years in the columns and retailers nested within product line in the rows. The measure is sales revenue. Select 2004, sort in descending order, and you see retailers listed from the largest sales revenue value to the smallest value for each product line.

Procedure

1. Within a crosstab, select a member or measure to sort.

For example, to sort a set in the row axis, select a member or measure in the column axis.

2. Click the sort button  and click **Sort by Value - Ascending** or **Sort by Value - Descending**.

Sorting charts


You can sort items in a chart in ascending or descending order based on a label or numeric value, such as employee name or revenue.

The information bar indicates the value or caption the sort was based on and whether the direction of the sort is ascending or descending.

Sort a chart by label

You can sort items in a chart based on a label.


Procedure

1. Within a chart legend or category axis label, select a set of values to sort.
2. Click the sort button  and click **Sort By Label - Ascending** or **Sort By Label - Descending**.

Sort a chart by value

You can sort items in a chart based on a value.


Procedure

1. Within a chart legend or category axis label, select a member or measure to sort.
2. Click the sort button  and click **Sort by Value - Ascending** or **Sort by Value - Descending**.

Remove sorts with the sort button

You can use the sort button in the toolbar or context menu to remove sorts from lists, crosstabs and charts.

Procedure



1. Within a list, crosstab or chart, select the set or column that was used to create the original sort.
2. Click the sort button  and click **Remove Sort**.

Remove sorts using the information bar

You can use the information bar to remove sorts from lists, crosstabs and charts.


When the information bar is expanded, a delete icon appears beside the sorts you can remove.

Procedure

1. Click the expand button  on the information bar to display the applied sort conditions.
2. Click the delete button  beside the sort you want to remove.

Displaying filter and sort values in the information bar

The information bar displays the filter and sort details that are applied to a list, crosstab, or chart. It is displayed at the top left side of each applicable report object within the report widget when data is filtered or sorted.

The information bar is collapsed  by default. You can open it by clicking on the collapsed information bar to expand and display the filter and sort details as line items as shown in the following graphic.

Recruitment by organization and department				
Filter applied, Sort applied				
Department : Customer Service, Human Resources, Marketing, Production and Distribution				
Department : By label descending order				
Europe	Distribution			
	Marketing	193	194	
	Human Resources	181	190	
	Customer Service	256	261	
GO Southern Europe	Production and Distribution	291	303	

To collapse the information bar, click anywhere on the heading of the information bar.

If a widget that contains filter and sort information is printed or exported to a PDF file or is exported to a Microsoft Excel file, the information contained in the information bar is also printed or exported to the file. For more information, see “Creating PDF files from workspace widgets” on page 80 and “Export a workspace widget” on page 82.

Filters


The filter conditions that are displayed in the information bar include the following:

- Filters applied in the report widget using the filter action from the widget toolbar or context menu.
- Filters applied by responding to a prompt in a prompted report object.
- Filters applied to the report in IBM Cognos Analysis Studio, IBM Cognos Query Studio, or IBM Cognos Report Studio.
- Filters applied to the report by using a slider filter or select value filter widget.

You can remove some filter conditions from the information bar if a delete button




is displayed beside the condition. For more information, see “Remove individual filters using the information bar” on page 68.

If a filter condition appears in grey or it has a lock icon , the filter cannot be removed from the information bar. For example, if a report author applies a filter using Report Studio or Analysis Studio, that filter cannot be removed from the information bar. For more information, see “Filtering with slider filter and select value filter widgets” on page 69.

Sorts

The sort conditions that are displayed in the information bar include the following:

- Sorts applied in the report widget by using the sort action from the widget toolbar or context menu, or by clicking the sort arrows on a column heading
- Sorts applied to the report in Query Studio or Report Studio


You can remove sort conditions from the information bar if a delete button  is displayed beside the condition. For more information, see “Remove sorts using the information bar” on page 72.

Changing the prompt values in a report

If a workspace contains a report with prompts, you can change the prompt values to refocus the displayed report data. The report data is filtered and returned based on the selected prompt values.

The prompt parameter is displayed as a locked filter condition in the information bar.

Procedure


1. Select the report widget that contains the prompted report content.
2. Click the widget **Actions Menu** button  and click **Prompt Again** from the drop-down list.
3. Select new prompt values from the prompt control.

Resetting report content

Resetting report content resets the report to the base report for a live report. Reset is not available for saved output reports. Also, you can not reset the report if the original report was deleted or disabled.

When the report content is reset, any changes you have made to the content are lost.


Procedure

1. Select the report widget that contains the report content to reset.
2. Click the widget **Actions Menu** button  and click **Reset** from the drop-down list.


Opening a workspace with a new version of a report

If original versions of reports or report parts were modified and you open a saved workspace, report widgets display an information icon in the top right corner of the report widget.

For example, a report author might modify a report using IBM Cognos Report Studio. When you open the saved workspace that references the modified report,

and you are the workspace owner, the information icon  indicates that a new version of the report is available. The icon is displayed only if the report or report part is live. The icon is not displayed for saved output.

Procedure

1. Pause the pointer over the information icon  to see the tooltip and click **Get new version**.
2. In the **Reset** dialog box, click **Yes**.

Adding simple calculations in lists and crosstabs

You can perform basic calculations for lists and crosstabs in IBM Cognos Business Insight using data from one or more report items. For example, you can multiply the values in two columns or multiply the values in a single column by a constant.

Calculation results are not stored in the underlying data source. Instead, IBM Cognos Business Insight reruns the calculation each time the report is refreshed. The results are always based on the current data in the data source.

Note: Depending on how the report was authored, calculations might be restricted by the functions that are available in the data source.

The following operations are available when you create a calculation in IBM Cognos Business Insight.

Arithmetic operations	Description
+ (sum)	Adds the values of the selected report items.
- (difference)	Subtracts the values of one selected report item from another.
* (multiplication)	Multiplies the values of the selected report items.
/ (division)	Divides the values of the selected report items.
% Difference	Calculates the percentage difference between the selected report items.

If only one report item is selected, you can perform arithmetic operations on that item using a constant value. For example, you can multiply the values of a salary column by 1.05 to see the results of a 5 percent increase.


Note: The available operations depend on the selected data. For example, if only one row or column heading is selected, you can perform operations using a constant. If two or more column or row headings are selected, you can perform addition, subtraction, multiplication, division and percentage difference operations.

Add a simple calculation

You can perform basic calculations for lists and crosstabs in IBM Cognos Business Insight using data from one or more report items.

Complete the following steps to add a simple calculation.


Procedure

1. Within a list or crosstab, select the headings of the report items you want to include in the calculation.
2. On the toolbar, click the calculate button .
3. In the drop-down list, click the operation you want to perform.

Results

The calculated results appear in a new column or row. By default, the expression used in the calculation is used as the heading name.

Tip: To make the name of the calculated row or column more meaningful, right-click the heading name, click **Rename** from the context menu, and type a new name.

To apply complex calculations to the report, click the **Do More** button  to open the report in Business Insight Advanced. For more information see the IBM Cognos Business Insight Advanced *User Guide*.

Delete a calculation

You can delete calculations.

Procedure

Within a list or crosstab, right-click any cell in the calculated column that you want to remove and select **Delete** from the context menu.

Grouping identical values that are in a list report

If a column in a list report contains multiple instances of the same value, you can group these identical values together.

Grouping reorders the rows of a selected report item so that identical values appear together and the display of duplicates is suppressed.

Grouping and ungrouping might change the order of the report items as grouped columns precede ungrouped columns. However you can reorder the list columns to make the report more readable.

Each group displays summarized values for the identical report items if footer summarization was enabled when the report was authored.


An example of grouping identical values is shown in the following report; the duplicate country or region values are suppressed when grouped.

Bonus list		
Country	Employee	Bonus %
Australia	Andrea Samuel	4.00%
	Catherine Fowlie	6.00%
	Dean Campbell	2.00%
	Doris Berger	6.00%
	Jonathan Applebergh	6.00%
	Karen Donnelly	4.00%
	Ken Wilson	4.00%
	Susan Davidson	4.00%
	Thomas Faraday	4.00%
Australia		4.44%
Austria	Ava Anuschek	6.00%
	Earnest Wagner	4.00%


You cannot group numeric values. You can group only report items containing text data or non-numeric data, such as years or order numbers.

Procedure

1. Within a list report or report part, click the column heading or data value of the report item by which you want to group.

2. On the toolbar, click the group/ungroup button .

The report suppresses duplicate values of the selected report item and summarizes the values in each group.

Tip: To ungroup, click the original item heading and then, on the toolbar, click the group/ungroup button .

Reordering list columns

You can reorder list columns in a report widget to better organize the data.

Procedure

To reorder list columns, select the column that you want to move and drag it to the new position. A flashing black bar indicates where you can drop the column. You can also right-click the column and select **Move, Left** or **Move, Right** from the context menu.

Renaming list columns

You can rename list columns in a report widget to a more meaningful column name.

Procedure

To rename a list column, select the name of the column that you want to rename, select **Rename** from the context menu, and type a meaningful name. To see the original name of a renamed column, select the column name, and select **View Original Label** from the context menu. You can also pause your pointer over the column name and a tooltip indicates the original label.

Providing quick access to your favorite workspaces and reports

If there are certain workspaces or reports that you refer to on a regular basis, you can add them to your **My Favorites** list. Once a workspace or report is added to **My Favorites**, it is displayed as a thumbnail image on the Getting Started page.

You can also filter the objects displayed in the **Content** tab to view all of the workspaces and reports in your **My Favorites** list. For more information on filtering in the **Content** tab, see “Viewing My Favorites.”

Adding a workspace or report to My Favorites

You can add a workspace to **My Favorites** from the application bar or the **Content** tab. Reports can only be added to **My Favorites** from the **Content** tab.


Add a workspace to My Favorites from the application bar

You can add a workspace to **My Favorites** from the application bar.

Before you begin

To mark a new workspace as a favorite, you must save it first.

Procedure

1. Open the workspace in IBM Cognos Business Insight.
2. On the workspace application bar, click the **My Favorites** icon .

Results

The **My Favorites** icon changes to yellow  to indicate the workspace is marked as a favorite.

Add a workspace or report to My Favorites from the Content tab

You can add a workspace to **My Favorites** from the **Content** tab.

Procedure

1. In the **Content** tab, browse to and select the workspace or report to add to **My Favorites**.
2. Right-click and, from the context menu, select **Add to My Favorites**.

Viewing My Favorites

After a workspace or report is added to **My Favorites**, it is displayed under the **Favorites** heading on the Getting Started page.

The Getting Started page is displayed each time you log in to IBM Cognos Business Insight and can be enabled and disabled from My Preferences. You can also view your list of favorites by filtering on **My Favorites** in the **Content** tab.

Procedure

To view **My Favorites**, in the **Content** pane, click the **Content** tab, and select **My Favorites** from the content category drop-down list. Only workspaces and reports marked as favorites are displayed.

Opening a workspace or report from My Favorites

You can open a favorite workspace or report from the Getting Started page or the **Content** tab.

Procedure

1. From the Getting Started page, click on a workspace or report from the **Favorites** list.
2. From the **Content** tab, select **My Favorites** from the content category drop-down list, then right-click the workspace or report and select **Open** from the context menu.

Removing a workspace or report from My Favorites

If you no longer refer to a workspace or report, it can be easily removed from **My Favorites**. You can remove a workspace from **My Favorites** from the Getting Started Page, the application bar, or the **Content** tab. Reports can only be removed from **My Favorites** from the Getting Started Page and the **Content** tab.

Remove a workspace from My Favorites by using the application bar

You can remove a workspace from **My Favorites** from the application bar.

Procedure

1. Open the workspace in IBM Cognos Business Insight.
2. Click the **My Favorites** icon  on the workspace application bar.

Results

The **My Favorites** icon changes to white  to indicate the workspace is no longer a favorite.

Remove a workspace or report from My Favorites by using the Content pane

You can remove a workspace from **My Favorites** from the Content pane.

Procedure

1. In the **Content** tab, select **My Favorites** from the content category drop-down list and select a favorite workspace or report.
2. Right-click and, from the context menu, select **Remove from My Favorites**.

Remove a workspace or report from My Favorites by using the Getting Started page

You can remove a workspace from **My Favorites** from the Getting Started page.

Procedure

Right-click a workspace or report in the Favorites list on the Getting Started page and click **Remove from My Favorites**

Results

When a workspace or report is removed from **My Favorites**, it is not removed from the content store and is still available in the **Content** tab.

Printing a workspace

You cannot print a workspace directly from IBM Cognos Business Insight. However you can print a report widget to PDF format and then print the PDF file.

For more information, see “Creating PDF files from workspace widgets.”

Tip: Type Ctrl+P to use the web browser to print what is displayed on the screen.

Alternatively, if you have IBM Cognos for Microsoft Office installed in your business intelligence environment, you can import a workspace into any of the supported Microsoft applications and then print the workspace as a Microsoft document. For more information, see the IBM Cognos for Microsoft Office *User Guide*.

Creating PDF files from workspace widgets

You can print individual report widgets as PDF format.


Printing as PDF opens the widget in Adobe Reader to view the full data for the widget and a preview of how it will appear if you print it. The PDF also includes the total number of pages. Depending on your version of Adobe Reader, you might be able to edit the PDF output before saving or printing it.

You must have execute permissions to use the print as PDF option.

Any sort and filter information (including filters applied by a slider filter, select value filter, or prompt control) displayed in the information bar is also printed in the PDF.

Alternatively, you can export widgets to PDF to view them in Adobe Reader. For more information, see “Export a workspace widget” on page 82.

Procedure

1. Click the **Actions Menu** button  for the report widget and, from the drop-down list, click **Print as PDF**.
2. In Adobe Reader, click the print icon from the toolbar or context menu to print the report.

Exporting workspace widgets to different formats

You can export individual report widgets that contain report content to the following formats: PDF, Microsoft Excel, CSV, and XML.

You must have execute permissions to use the export option.

When you run a report in an export format such as PDF, delimited text (CSV), Microsoft Excel (XLS), the IBM Cognos report name is used as the exported file name.

PDF

To save a snapshot of your data, you can create a PDF version of a report widget.

When you export to PDF, the widget appears in Adobe Reader, so you must have Adobe Reader installed on your computer.

Any sort and filter information (including filters applied by a slider filter, select value filter or prompt control) displayed in the information bar is also exported to the PDF.

Note: Alternatively, you can print individual report widgets to PDF to view them in Adobe Reader. For more information, see “Creating PDF files from workspace widgets” on page 80.

Microsoft Excel 2007

Exporting to Microsoft Excel 2007 produces reports that you can view in Microsoft Excel version 2007.

Microsoft Excel 2007 format renders output in native Excel XML format, also known as XLSX. This provides a fast way to deliver native Excel spreadsheets to users of Microsoft Excel 2002, Microsoft Excel 2003, and Microsoft Excel 2007. To open and save these files, users of Microsoft Excel 2002 and Microsoft Excel 2003 must install the Microsoft Office Compatibility Pack. The output is similar to other Excel formats, with the following exceptions:

- Charts are rendered as static images.
- Row height can change in the rendered report for better viewing of content.
- Column widths that are explicitly specified in reports are ignored in Microsoft Excel 2007.
- Merged cells are used to improve the appearance of reports.
- The default size of worksheets is 65,536 rows by 256 columns.

Your IBM Cognos administrator can enable larger worksheets and change the maximum number of rows in a worksheet - up to a maximum of 16,384 columns by 1,048,576 rows - by using advanced server properties. For more information, see the *IBM Cognos Business Intelligence Administration and Security Guide*.

Any sort and filter information (including filters applied by a slider filter, select value filter or prompt control) displayed in the information bar is also exported to Excel 2007.

Microsoft Excel 2002

Exporting to Microsoft Excel 2002 produces reports that you can view in Microsoft Excel versions earlier than 2007.

Microsoft Excel 2002 format offers the following benefits:

- Works with SSL protocol.
- Works with a single signon. Secure reports can be accessed without subsequent signons because the system automatically identifies users and provides security information.
- Works with Netscape 7.01.
- Spreadsheets are contained in a single file for reliable spreadsheet navigation.
- The maximum size of worksheets is 65,536 rows by 256 columns.

CSV

You can view list report widgets in CSV (Comma Separated Values) format. You cannot view charts or crosstab report widgets in CSV format.

When you export to CSV, the widget appears in the application you have associated with CSV format files.

To produce in CSV output:

- Charts must have at least one category or series.
- Reports must have only one query defined in the report, unless the additional queries are used for prompts.

XML

XML outputs are useful if you want to use a report widget as a data source for another report or widget, or if you use a database that cannot be read by Framework Manager.

To produce in XML output:

- Charts must have at least one category or series.
- Reports must have only one query defined in the report, unless the additional queries are used for prompts.

Export a workspace widget

You can export individual report widgets that contain report content to the following formats: PDF, Microsoft Excel, CSV, and XML.

Procedure

Click the **Actions Menu** button  for the report widget and, from the drop-down list, click **Export to** and then click a file type.

Results

The report content appears in the file format you chose.

For more information, see “Exporting workspace widgets to different formats” on page 81.


Making reports accessible to users with disabilities

You can enable accessibility features in reports to ensure access of information to all users, with all levels of ability. Accessible reports contain tags that allow users with disabilities to access report content using assistive technologies, such as screen readers.

When accessible reports are enabled, accessible report output is available in PDF, HTML, and Microsoft Excel 2007.

Note: Accessible reports require more report processing and have a greater file size than non-accessible reports and as a result, IBM Cognos Business Insight performance might be reduced when this option is enabled.

Procedure

1. On the application bar, click the **Actions Menu** button  and, click **My Preferences** from the drop-down list.
2. Select the **Enable accessibility support for reports** option.
To disable accessible report output, deselect this option.
3. Click **OK** to save the setting and close the dialog box.

Drilling to view related data

IBM Cognos Business Insight supports various drill operations so that you can view related report data. You can perform drill operations in lists, crosstabs, and charts.

Drilling up or drilling down



You can drill up or drill down within a report or report part.

In IBM Cognos Business Insight, for lists and crosstabs, drillable items are identified by hyperlinks when the pointer pauses over the data item. In charts, the pointer changes to a hand when you pause it over a drillable item, and a tooltip indicates what you are drilling on.

If you drill on a report item that uses a slider filter widget to filter table and chart data, the slider filter will not update to the new drill level. If you want the slider filter to act on the new drill level, you must update the slider filter properties.

In Business Insight, drill up and drill down is available only when you are using dimensionally structured data.

Procedure

1. Add a report or report part to the workspace.
2. Right-click the report item you want to drill on and click the **Drill Up**  or **Drill Down** button .

Tip: You can also click the drillable report item twice to drill down. The first click selects the cell in the list or crosstab and displays the down cursor, the second click drills down. If only drill up is available on a selected item, the drill up cursor is displayed and the second click drills up.

Synchronizing drill up and drill down

If two report widgets listen to each other, are based on the same dimensionally-modelled data source, and the report contains items from the same hierarchy, drilling in one report widget will affect a drill in the other report widget.

For example, when you drill down on the item 2005 in one report widget, all reports in the workspace drill down on the same item and the data for the year 2005 appears in all reports.

By default, the communication between the report widgets is enabled. To turn off communication between the two report widgets, see “Widget to widget communication” on page 46.

Go to another target report

You can navigate from a report object to another target report.

You can go to the following targets:

- An IBM Cognos Query Studio report
- An IBM Cognos Report Studio report
- An IBM Cognos Analysis Studio analysis
- An IBM Cognos Series 7 report
- A Microsoft Analysis Services report

Before you can go to another target, a drill-through definition must be created in the package. For more information, contact your administrator.

By default, drilling through from a package is enabled.

Procedure

1. Add a report or report part to the workspace.
2. Right-click the report item from which you want to navigate and click **Go To**



If there is only one possible target for the column, it appears in the studio where the drill is authored to go to.

If there is more than one possible target for the column, the **Go To** page appears, showing the available targets.

3. Click the target you want to navigate to.


The target appears in IBM Cognos Viewer.

Viewing report versions

If there are multiple report output versions saved in the content store, you can view the saved report output versions or view the live version of the report. The report is displayed using the latest saved output version by default.

To run saved report output versions, you must have execute permissions on the report. If you do not, contact your system administrator for assistance.

Procedure

1. Click the widget **Actions Menu** button  for the widget, and from the drop-down list, click **Versions** to display the list of saved output versions.
2. From the list, select the version that you want to view. To display the live version of the report, select **Live**.

If there are more than five saved report versions, click **More** to display the entire list.

Creating watch rules for specific conditions

You can set up a watch rule to send an alert when a specific condition in a saved report is satisfied.

Before you begin

You must have read and traverse permissions to the report output to create watch rules.

For information on enabling watch rules, see the IBM Cognos Connections *User Guide*.

Procedure

1. In the report widget that contains a saved HTML report version, right-click a numeric data item and then click **Alert Using New Watch Rule**.
2. In the **Specify the rule - Alert Using New Watch Rule** page, select **Send an alert when the report contains**.
3. In the conditional expression, from the drop-down list, select the expression to use for the watch rule, for example, \geq (greater than or equal), and specify a value in the box.
4. Under **For the selected context**, select the report items to which the rule applies.
5. Click **Next**.

What to do next

You must now set up the alert details for the watch rule. For more information, see “Defining alert details for watch rules” on page 86.

Creating watch rules for different condition status indicators

You can set up a watch rule to send different alerts depending on the performance status (good, average, and poor) of a condition in a saved report.

To set up the watch rule, you use thresholds to map a range of numeric values to performance status. When setting up your threshold boundaries, you must decide whether low, medium, or high values are favorable for the condition. For example, if you are setting up a condition to monitor sales figures for a product, you would indicate that high values are favorable. This is known as the performance pattern.

Watch rules can be created only in saved HTML reports. You cannot create watch rules in other report formats.

Before you begin

To create watch rules, you must have read and traverse permissions to the report output.

Procedure

1. In the report widget that contains a saved HTML report version, click a numeric data item, right-click, and then click **Watch New Versions, Alert Using New Watch Rule**.
2. In the report, click a numeric data item, right-click, and then click **Alert Using New Watch Rule**.
3. In the **Specify the rule - Alert Using New Watch Rule** page, select **Send an alert based on thresholds**.
4. In the **Performance pattern** box, select which range of values to associate with "good performance" status.
5. In the **Threshold boundaries** box, specify the boundary values for the condition.
Tip: For each boundary value, you can click the arrow attached to the numeric value box to adjust them follows:
 - To include the specified boundary value in the higher threshold, click the up arrow.
 - To include the specified boundary value in the lower threshold, click the down arrow.
6. Under **For the selected context**, select the report items to which the rule applies.
7. Click **Next**.

What to do next

You must now set up the alert details for the watch rule. For more information, see "Defining alert details for watch rules."

Defining alert details for watch rules

When you have defined the type of watch rule you are creating, you must define the type of alert you want to generate.

You can choose one or more of the following options:

- **Send the report by email** if you want to be alerted by email
- **Publish a news item** if you want to be alerted by news item
- **Send a notification** if you want to alert other users by sending notifications to their task inbox

If you have set up a watch rule for different condition status indicators, you can define multiple alerts, depending on performance. For example, for average or poor performance, you could choose to be alerted by email as well as sending a notification to the sales manager to review the sales figures. For good performance, you could send a notification to the sales manager to distribute the figures to the sales team.

Procedure

1. In the **Specify the alert type - Alert Using New Watch Rule** page, specify which alerts to send when the rule is satisfied.
Tip: To change the details for an alert type, click **Edit the options**.
2. If you have defined a watch rule for different condition status indicators, select the required check boxes to associate the alert with poor, average or good performance.
Performance is defined by the performance pattern.
Click **Next**.
3. In the **Specify a name and description - Alert Using New Watch Rule** page, specify a name, description, screen tip, and location for the watch rule.
Tip: You can organize watch rules in folders on the **Rules** tab of the **My Watch Items** area of the portal.
4. Click **Finish**.

Viewing, modifying, or deleting a watch rule

Watch rules you create in saved reports can be edited and deleted in IBM Cognos Business Insight.

For information about creating a watch rule, see “Creating watch rules for specific conditions” on page 85, and “Creating watch rules for different condition status indicators” on page 85.

You can also delete and edit watch rules from the **My Watch Items** area of the IBM Cognos Connection portal.

Before you begin

To modify or delete a watch rule, you must have write access to the rule.

Procedure

1. Select the widget that contains a saved HTML report version on the workspace.
2. On the report widget toolbar, click **Watch New Versions** and, while hovering over the watch rule, from the submenu click **Modify** to edit the watch rule.
The **Set properties** dialog box appears.
Tip: Click **Delete** to delete the watch rule.
3. Click the **General** tab to change properties, such as the language, name, and description of the watch rule.
4. Click the **Rules** tab to edit the rules properties, such as the conditional expression for the rule, the items to which the rule applies, and the alert type.

Results

Any changes you make to a watch rule in IBM Cognos Business Insight are also made in the **My Watch Items** area of the IBM Cognos Connection portal.

Viewing lineage information for a data item

You can view the lineage information of a report data item to see what the item represents. Lineage information traces the metadata of an item back through the package and the data sources used by the package. Lineage also displays any data item filters that were added by the report author or that were defined in the data model.

Lineage is available only after your administrator has configured it. For more information, see the *Administration and Security Guide*

Note: Lineage is not supported in reports that are not linked to packages.

You can use the lineage tool that comes with IBM Cognos Business Intelligence, or you can use another lineage tool by specifying the URL to the tool in IBM Cognos Administration. Note that if the URL source is secured, the source must be able to prompt users for a password because IBM Cognos BI does not pass security information. IBM Cognos BI also supports the IBM Metadata Workbench as a lineage tool. For more information about configuring other lineage tools, see the *Administration and Security Guide*.

The IBM Cognos BI lineage tool

The IBM Cognos BI lineage tool includes two views: the business view and the technical view.

The business view displays high-level textual information that describes the data item and the package from which it comes. This information is taken from IBM Cognos Connection and the Framework Manager model.

The technical view is a graphical representation of the lineage of the selected data item. The lineage traces the data item from the package to the data sources used by the package.

When you click an item, its properties appear below it. If you click an item in the **Package** area, you see the model properties of the item. If you click an item in the **Data Sources** area, you see the data source properties of the item.

View lineage information for a data item

You can view the lineage information of a report data item to see what the item represents.

You cannot use lineage information to troubleshoot queries. For example, lineage information will not explain why a data item is double counted.

Before you begin

Before you can access lineage information for a report, your administrator must configure lineage in IBM Cognos Administration. Also, the administrator must enable the lineage capability and grant read permission for you on the report.

The IBM Cognos BI lineage tool shows lineage on a report at its highest level. The lineage does not change after you drill-down on a report. Because the selection context used to launch lineage can be affected by drill-down operations, we recommend that you always start lineage at the highest report level before drilling

down on the report. Otherwise, the lineage might not launch properly.

Procedure

1. Open a workspace that contains report content, or drag and drop a report or report part onto the workspace.
2. In the report widget, right-click a report data item and click **Lineage**.

Tip: You can view lineage information for multiple data items at the same time by first Ctrl+clicking the items. The IBM Metadata Workbench does not support viewing lineage for multiple data items at once.

Results


The lineage tool opens showing the lineage information of the selected data item.

Viewing information cards

IBM Cognos Business Insight provides information cards that display high level information about workspace content such as owner, contact information, and date modified. Information cards also display a thumbnail view of the workspace or report content.

By default, the information card feature is disabled. Complete the following steps to enable or disable information cards and view information cards.

Procedure

1. Click the information card button  in the upper right corner of the **Content** tab.
2. When information cards are enabled, pause the pointer over content in the **Content** pane **Content** tab, or in the **Open** or **Save As** dialog boxes to see the information card.

Accessing the IBM InfoSphere Business Glossary

Business glossaries help you manage and share an enterprise vocabulary and classification system.

If you use the IBM InfoSphere® Business Glossary, you can access the glossary from any of the following report data objects in a report widget:

- Query subject
- Query item
- Measure
- Dimension
- Hierarchy
- Level
- Property/attribute
- Top node member
- Member
- Level item

Procedure

1. Open a workspace that contains report content, or drag and drop a report or report part onto the workspace.
2. In the report widget, right-click a report data object and click **Glossary**.

Results

The IBM InfoSphere Business Glossary appears.

Chapter 5. Collaborating with IBM Cognos Business Insight

Collaboration capabilities in IBM Cognos Business Insight provide a bridge between using IBM Cognos Business Intelligence to discover a business problem and acting to resolve it.

Decision making is often a team activity. Individuals create and receive reports, perform analysis, and monitor workspaces. When the time comes to act on this information, individuals come together with their colleagues to make decisions. As well as collaborating through email, phone calls, and meetings, business users now have the ability to collaborate while creating or viewing reports, performing analysis, or monitoring workspaces.

You can collaborate using Business Insight comments or by using IBM Connections activities. You can also use the additional enterprise social software capabilities in IBM Connections to collaborate outside of a workspace.

Collaborating by using comments

Comments, also referred to as annotations, allow you to collaborate on the content of a report on a workspace. You can add simple comments to a report so that other users viewing the same report will have additional context or information about the report. Those users can respond with further comments about the report.

This type of collaboration is useful, for example, to add a reminder to investigate low sales figures for a particular product, or to explain an anomaly in the data that could be a cause for concern.

To have a more detailed discussion about the workspace, involving other team members, to set up activities related to the discussion, and to track the history of that discussion in a single place, you can use the collaborative decision-making facility provided through activities.

For more information, see “Collaborating by using IBM Connections activities” on page 94.

You can add comments to live reports, and saved report output versions. When you print a live report to PDF, or export it to PDF or Microsoft Excel spreadsheet software, comments are included.

You can add, view, and edit comments on the following areas of the workspace:

- reports or report parts
- individual cells or data items in reports and report parts

Cell-based comments are available in lists and crosstabs only.

To add or edit comments, you must have execute access for live reports and read and traverse access for saved output versions. Comments are visible to other workspace users.

Comments are also available in IBM Cognos Viewer, but these are completely separate from comments in IBM Cognos Business Insight and work in a different way. For information, see "Comments in Saved Reports" in the IBM Cognos Connection *User Guide*.

Adding comments

You can add comments to a report widget for all report display types. Within a list or crosstab you can also add comments to individual cells.

A comment is specific to the context of the report, as well as the cell (if applicable) and prompt value (if applicable). Suppose you select January as the prompt value for the "month" prompt when you run a report. If "month" is included in the report, when you apply a comment, the comment is specific to January. If you later change the prompt value to February, the previous comment from January still exists, but you will not see it on the report. You can, however, add a new comment for February, if required.

When you add a cell-based comment, consider the following:

- The comment belongs to the cell, not to its value.
If the value of a cell changes after a report is refreshed, the previous comment still exists and is visible.
- The value of the cell is included in the comment text by default.
If you include the value in the comment, and this value changes when the report is refreshed, the original value still exists in the previous comment. However, if you add another comment to the same cell, the updated value is included in the new comment text.
- The comment is specific to the cell in the current report only.
If the same cell exists in another report, the comment is not linked.

Note: If you change the display type to a format that does not support comments, the comments are not visible. You must change the display back to the original format to view the comments again.


If you have read access to a report, you can add information to an existing comment by editing it. The comment will show all content added by you and other users. For more information, see "Editing or deleting comments" on page 93.

Before you begin

You must have read access to a report to add comments to it.

You must save the workspace before you can add comments. If the workspace is not saved, you will be prompted to save it when you attempt to add a comment.

Procedure

1. Select the required report cell or report widget.
2. From the widget toolbar, click the **Comment** button .
3. Click **Add Comment**.
4. In the pop-up box, type the required comment.
5. Click **Done** to save the comment.

Results

A red triangular marker appears in the top corner of the report widget or cell to indicate that a comment has been added to it, as shown below in the return quantity for personal accessories cell.

Return quantity	Product line
304,443	Camping Equipment
106,133	Mountaineering Equipment
286,900 	Personal Accessories

Viewing comments

Comments can be viewed by anybody who has read access to the report.

If there are multiple comments for the same cell or report widget, the comments appear in reverse chronological order. For each comment, you can see the user's name, date, and the time the comment was written.

The time stamp on a comment is based on the time zone set in the user's IBM Cognos Business Insight personal preferences.

Procedure

To view comments, pause the pointer over the comment (indicated by a red triangular marker).

Editing or deleting comments

You can edit or delete comments that you add during the current workspace session.

When the workspace is closed, it is no longer possible to edit or delete comments from that session. You can, however, add additional comments to the initial comment using the **Edit Comment** action.


You cannot edit or delete comments added by other users at any time.

If you delete a report column or row containing cell-based comments, the comments no longer appear. If you later restore the column or row using the **Reset**

action on the **Widget Actions** button  for the widget, the associated comments are also restored.

When a report is refreshed, if a report column or row containing a comment has been deleted from the data source, the comment no longer appears.

Procedure

1. Select the required report cell or report widget.
2. From the widget toolbar, click the **Comment** button .
3. Do one of the following:
 - To edit a comment, click **Edit Comment**, change the text, and click **Done**.

- To delete a comment, click **Delete Comment**.

Collaborating by using IBM Connections activities

Activities, part of IBM Connections, is a web-based collaboration service for collecting, organizing, sharing, and reusing work related to a goal. Members of an activity interact in an online location in which they create, collect, and share a set of ideas and resources to support a goal. An activity is a way for you to organize your work and collaborate with others in a shared web space. Because it is easy to invite new members, you can quickly gather the right people and resources you need to get the job done. You can post messages, share files and links to web sites, and create and assign to-do items.

Activities are integrated with IBM Cognos Business Insight and form a key part of it.

When individuals identify business problems and opportunities using IBM Cognos Business Intelligence, they often need to collaborate to share information with colleagues and to make team-based decisions. With activities, you can collaborate on the content of an entire workspace and solve these problems in a faster and more structured way.

For example, you may have previously collaborated with another colleague, using comments to flag low sales figures for a particular product. You then decide that a more detailed investigation about the sales figures is required to resolve the problem. You can set up an activity that involves collaborating with other team members, so that you can track the history and outcome of that activity in a single place.

Using activities for collaborative decision-making can facilitate the whole decision-making process. You can create activities in Business Insight for the following reasons:

- To provide a single place to gather each participant's ideas and opinions.
- To include a link to the Business Insight workspace so that teams can conduct further analysis as required.
- To provide a single historical record of how issues are resolved and how decisions are reached.
- To track and audit decisions and initiatives.
- To include all stakeholders and interested parties in the decision-making process.
- To allow other people who join the activity after it has started to view the activity and to quickly understand its history.

Starting a workspace activity

When you identify an issue related to a workspace, and you want to collaborate with other team members to resolve it, you can start a workspace activity. This creates an IBM Connections activity that is connected to the workspace.



After the activity is created, you can work with it in Connections. The activity contains one entry named IBM Cognos Business Insight, which provides the URL address for the workspace.

The URL address is pre-defined and should not be changed.

Before you begin

You must save the workspace before you can start a workspace activity. If the workspace is not saved, you will be prompted to save it when you attempt to start an activity.

Procedure

1. On the workspace application bar, click the **Collaborate** menu button .
2. From the drop-down list, click **Start an Activity**.
3. In the **Title** box, type a brief description of the activity.
4. In the **Activity goal** box, type a description of what you want to achieve from the activity.
5. In the **Tags** box, add tag terms that will allow users to search for the activity in Connections. Separate each term using a comma.
For example, if the activity is related to sales figures for tents, you could add "tents" and "camping equipment" as your tags.
6. If required, in the **Due date** box, enter the required completion date for the activity.
7. To include team members in the activity, expand **Member options**.
Other users can only see the activity if they are added as members.
8. To add an individual user to the activity, first select the user role from the drop-down list. The access level options for each role are defined as follows:
 - **Author** - can view content and add entries (default).
 - **Owner** - can add content, view, and edit all entries.
When you start an activity, you are automatically added as an owner.
 - **Reader** - cannot contribute to an activity; access is restricted to viewing content only.
9. Type the user's name in the box adjacent to the user role, and then click **Add** .

Repeat this step for each member you want to add.

Tip: If you are adding multiple members belonging to the same LDAP user group, you can quickly add all members by typing the user group name.

Note: Users can only access the activity if they have been added to it. You can change the activity membership in Connections after the activity has been created.

10. To use a template for the activity, expand **Template options**.
11. Click **Pick an Activity Template**, and then select a template from the list. Alternatively, if you do not want to use a template, select **None** from the list.
If you pick a template when creating an activity, your new activity is based on another activity that already exists.
Templates are only available if they have been created in Connections. You can create templates containing a standard set of steps or processes that you want to follow. For example, a collaborative decision-making template could include sections for evidence, objectives, proposals, and decision.

Tip: You can easily create a template in Connections by saving an existing activity as a template.

12. Select **Use members from template** if you want to populate the member list with the members defined in the selected template.
13. Click **Save**.
14. Select one of the following options:


- **Open this activity**

The activity opens in Connections. You can add additional members and entries (with links and attachments) to the activity, add comments to it, create to-do items, and assign them to team members as required.

- **Return to Business Insight**

You can continue working on the workspace.


Tip: You can return to the activity by selecting **View/Hide Workspace**

Activities from the **Collaborate** menu button  drop-down list.

Accessing IBM Connections from IBM Cognos Business Insight

You can access IBM Connections from IBM Cognos Business Insight in several ways.

Access Connections from Business Insight using the following ways:

- From an existing workspace activity in the collaboration pane directly to the activity in Connections.
- From the IBM Cognos Business Intelligence Welcome page.
- From the Launch menu in IBM Cognos Connection and IBM Cognos Administration.
- From the Launch menu in the workspace Actions menu .

When a workspace activity has been started, you can work with it in Connections. You can complete the following tasks:

- Add members to the activity.
- Change the access for an activity.
- Add sections to group together entries and to-do items.
- Add entries.
- Add to-do items and assign them to activity members.
- Complete to-do items.
- Add comments.
- Mark an activity as complete.
- Save an activity as a template for future activities.
- Tune out of or in to an activity.

There are other tasks you can perform for activities. For more information, see the Connections Information Center <http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.


Note: In Connections, you can view all activities for which you have access not just those associated with a specific workspace.

Adding members to an activity

You can add further members to an activity so that they can access it in IBM Connections.

If you add members to an activity who do not have access to the workspace in IBM Cognos Business Insight, they cannot see the associated workspace.

Procedure

1. From Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity to which you want to add a member.
3. Click **Add Members** in the navigation pane.
4. To add an individual user to the activity, first select the user role from the drop-down list. The access level options for each role are defined as follows:
 - **Author** - can view content and add entries (default).
 - **Owner** - can add content, view, and edit all entries.
When you start an activity, you are automatically added as an owner.
 - **Reader** - cannot contribute to an activity; access is restricted to viewing content only.
5. Type the user's name in the box adjacent to the user role, and then click **Add** .

Repeat this step for each member you want to add.

Tip: If you are adding multiple members belonging to the same LDAP user group, you can quickly add all members by typing the user group name.

6. Click **Save**.

Changing the access for an activity

You can control whether access to an activity is public or private.

By default, when an activity is started in IBM Connections or created from IBM Cognos Business Insight, the access is private, and available to the activity members only. If you change the access to public, anyone in Connections can access it. However, unless they are specifically given access to the associated workspace in Business Insight, they cannot see the workspace.

Procedure

1. From Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity to which you want to add a member.
3. In the **Public Access** section in the navigation pane, click **Change**.
4. Select one of the following options:
 - **Private (Default)** - only invited members can see the activity.
 - **Public (Read Only)** - anyone can find and view the content of the activity.
 - **Public** - anyone can find, see, and add content to the activity.
5. Click **Save**.

Adding sections to an activity

You add sections to an activity to provide a hierarchical outline for an activity, and to group together entries and to-do items.

Procedure




1. From IBM Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity to which you want to add the section.
3. Click **Add Section**.
4. In the **Section** box, type a brief description of the section.
5. Click **Save**.

Adding entries to an activity

You add entries if you want to include content in an activity. For example, you can add text, files, and bookmarks.

When you create an entry, you can add it to the activity or to a selected entry, to-do item or section contained within the activity.

Procedure

1. From IBM Connections, in the **Activities** tab, click **My Activities**.
 2. Click the activity and, if required, select the entry, to-do item, or section to which you want to add the entry.
 3. Click **Add Entry**.
 4. In the **Title** box, type a brief description of the entry.
 5. Add the following types of content as required:
 - To attach a file, click **Attach File** .
 - To add a web address, click **Add Bookmark** .
 - To add a customized field, click **Add Custom Fields** , and then click the desired field type.
- For more information on adding content, see the Connections <http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.
6. In the **Description** box, add further detail about the entry or the content.
 7. In the **Tags** box, add tag terms that will allow users to search for the entry in Connections. Separate each term using a comma.

For example, if the entry is related to sales figures for tents, you could add "tents" and "camping equipment" as your tags.

For more information on tags, see the Connections <http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.
 8. If required, in the **Section** drop-down list, select the section to which you want to add this entry.

Note: A list of sections is only available if the sections have already been added to the activity.
 9. To hide the entry from other activity members, select **Mark this entry private**.
 10. To notify activity members about this entry, select **Notify people of this entry** and then select one of the following:
 - To notify everyone, select **All members of this activity**.
 - To notify specific members only, select each individual member.

Note: If an LDAP user group was used to add members to an activity, to select a specific member of that group, you must add that person to the activity as an individual.

For more information about selecting members, see the Connections
<http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.

11. In the **Notify Message** box, add a comment that will appear in the notification that is sent to the selected members.
12. Click **Save**.

Working with to-do items in an activity

You can assign tasks to a group of activity members, or to specific members only, by creating to-do items.

If an LDAP user group was used to add members to an activity, and you want to assign a to-do item to a specific member of the group, you must add that person to the activity as an individual.

When you have finished working on a task, you can mark the to-do item as complete.

Creating to-do items for an activity




You add to-do items when you want to assign tasks to one or more activity members.

When you create a to-do item, you can add it to the activity or to a selected entry, to-do item, comment, or section contained within the activity.

Procedure

1. From IBM Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity and, if required, select the entry, to-do item, comment, or section to which you want to add the to-do item.
3. Click **Add To Do Item**.
4. In the **To Do** box, type a brief description of the task.
5. To include more information, expand **More options**.
6. To assign the item to a specific member only, click **Choose a person**, and then select the member's name.

By default, the item is shared and can be undertaken by any activity member.

7. If required, in the **Due date** box, enter the required completion date for the to-do item.
8. Add the following types of content as required:
 - To attach a file, click **Attach File**  .
 - To add a web address, click **Add Bookmark**  .
 - To add a customized field, click **Add Custom Fields**  , and then click the desired field type.

For more information on adding content, see the Connections Information Center at <http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.

9. In the **Description** box, add further detail about the item or the content.
10. In the **Tags** box, add tag terms that will allow users to search for the item in Connections. Separate each term using a comma.

For example, if the item is related to sales figures for tents, you could add "tents" and "camping equipment" as your tags.

For more information on tags, see the Connections Information Center at <http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.

11. If required, in the **Section** drop-down list, select the section to which you want to add this entry.
Note: A list of sections is only available if the sections have already been added to the activity.
12. To hide the entry from other activity members, select **Mark this entry private**.
13. To notify activity members about this entry, select **Notify people of this entry** and then select one of the following:
 - To notify everyone, select **All members of this activity**.
 - To notify specific members only, select each individual member.
For more information about selecting members, see the Connections Information Center at <http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.
14. In the **Notify Message** box, add a comment that will appear in the notification that is sent to the selected members.
15. Click **Save**.

Marking to-do items as complete

When you have finished working on a task, you can mark the to-do item as complete.

Procedure

1. From IBM Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity and find the to-do item related to the completed task.
Tip: To view a list of to-do items for the activity, click **To Do Items** in the navigation pane.
3. Select the check box adjacent to the required to-do item.

Results



The to-do item now appears crossed out to indicate that it has been completed.

Adding comments to an activity

You add comments when you want to log a note against an entry or to-do item. You can also respond to existing comments.

You can include content with the comment, for example, you can add files and bookmarks.

Procedure

1. From IBM Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity, and select the entry or to-do item to which you want to add a comment.
Tip: To respond to a comment, select the required comment.
3. Click **Add Comment**.
4. Add the following types of content as required:
 - To attach a file, click **Attach File**  .
 - To add a web address, click **Add Bookmark**  .

For more information on adding content, see the Connections <http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.

5. In the **Comment** box, add your comments.
6. To hide the entry from other activity members, select **Mark this entry private**.
7. To notify activity members about this entry, select **Notify people of this entry** and then select one of the following:
 - To notify everyone, select **All members of this activity**.
 - To notify specific members only, select each individual member.

Note: If an LDAP user group was used to add members to an activity, and you want to assign a to-do item to a specific member of the group, you must add that person to the activity as an individual.

For more information about selecting members, see the Connections <http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.
8. Click **Save**.

Marking activities as complete

When an activity's goal has been achieved, you can mark the activity as complete.

You must be the owner of an activity to mark it as complete.

Completed activities are not visible to activity members in **My Activities** in IBM Connections or in IBM Cognos Business Insight. You can view them in Connections by clicking **Completed** in the navigation pane.

Procedure

1. From Connections, in the **Activities** tab, click **My Activities**.
2. Click the required activity.
3. Click **Mark Activity Complete** in the title bar.

Saving an activity as a template

You can save an activity as a template to use as the basis for creating similar activities in the future.

You access templates from the **Activity Templates** tab. Complete the following steps to save an activity as a template.

Procedure

1. From IBM Connections, in the **Activities** tab, click **My Activities**.
2. Click the required activity.
3. Click **More Actions** in the title bar, and then click **Copy As New Template**.
4. In the **Template** box, type a name for the template.
5. In the **About this template** box, type a description for the template.
6. In the **Tags** box, add tag terms that will allow users to search for the template in Connections. Separate each term using a comma.

For example, if the template is related to the sales team, you could add "sales team" as your tag.

For more information on tags, see the Connections <http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.

7. In the **Starting page** drop-down list, select the type of view to display by default when a new activity is created using the template.

8. If you want to populate the template member list with the members defined in the activity, select **Use members from template**.
9. To add further members to the template, expand **Member options**.
10. To add an individual member, first select the member's role from the drop-down list, and then type the member's name in the box adjacent to the role. The access level options for each role are defined as follows:
 - **Author** - can view content and add entries (default).
 - **Owner** - can add content, view, and edit all entries.
 - **Reader** - cannot contribute to an activity; access is restricted to viewing content only.
11. Click **Save**.
12. Review the template and make changes to it as required.

Tuning out of or in to an activity

By default, when an activity is started using IBM Connections, its priority is set to normal, and you are tuned in to it. If you tune out of an activity, you can no longer see it, although it is still visible to other members.

Tuned out activities are not visible to activity members in **My Activities** in Connections or in IBM Cognos Business Insight. You can view them in Connections by clicking **Tuned Out Activities** in the navigation pane.

Once an activity is tuned out, you can reset the priority (normal, medium or high) by tuning in to it again.

Note: When an activity is tuned out in Connections, it disappears from the activity list in Business Insight. The activity re-appears if you tune in to it again.

Procedure

1. To tune out of an activity, do the following:
 - From Connections, in the **Activities** tab, click **My Activities**.
 - Click the required activity.
 - Click **More Actions** in the title bar, and then click **Mark as Tuned Out**.
2. To tune in to an activity, do the following:
 - From Connections, in the **Activities** tab, click **Tuned Out Activities**.
 - Click the required activity.
 - Click **More Actions** in the title bar, and then click the required priority.

Opening a workspace from IBM Connections

You can open the workspace to which an activity is connected directly from IBM Connections. You can only view workspaces for which you have access.


Procedure

1. From Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity for which you want to open the workspace.
3. Expand the entry named **IBM Cognos Business Insight**, and then click the workspace link.

Viewing workspace activities

You can view a list of activities started by users with access to the workspace, and open them in IBM Connections.

When a workspace has activities associated with it, a red flag appears on the

Collaborate menu button  and the number of activities available is shown in brackets on the **View/Hide Workspace Activities** menu button.

Note: When an activity is tuned out or marked as complete in Connections, it disappears from the activity list in Business Insight. The activity re-appears if you tune in to it again.


You can refresh the activity list in the Collaboration pane by clicking the **Refresh** button on the Collaboration pane toolbar.

You can close the Collaboration pane by clicking the **Close** button.

Before you begin

You can only view activities in IBM Cognos Business Insight which are associated with the workspace that is open and for which you have access.

Procedure

1. On the workspace application bar, click the **Collaborate** menu button .
2. From the drop-down list, click **View/Hide Workspace Activities**.

A list of all activities started for the workspace, for which you have access, appears in the Collaboration pane.

For each activity shown you can see the activity title, the name of the user who performed the last update, and the date and time of the update. The activity priority and due date are also shown, if they have been set up.

If you expand an activity, by clicking **More**, you can see a summary of the last three updates, and the activity goal.

3. Click an activity, or a specific entry within it, to open it fully in Connections.

Using IBM Connections to collaborate outside of a workspace

You can also use the additional enterprise social software capabilities provided by IBM Connections to collaborate with colleagues independently of the workspace environment.

For example, having used the collaboration capabilities on the workspace to investigate low sales figures for a product, your team may conclude that a new marketing campaign is required to promote the product. You decide to use Connections to continue your collaborative discussions with a wider network of colleagues.

Using Connections allows you to do the following:

- Develop, nurture, and remain in contact with your network of colleagues.
- Discuss and refine new creative ideas with communities of colleagues, partners, and customers.

- Respond quickly to business opportunities by calling upon the expertise in your network.

By allowing employees to easily connect with their networks, Connections can help organizations achieve the following benefits:

- Tasks can be completed faster through quick access to relevant information from an expanded network of professionals.
- Business decisions can be made with added confidence having consulted subject matter experts from across an organization.
- Innovation in products and services can be fostered as a result of the experiences and knowledge of communities of employees, partners and customers.

Connections provides the following services to help you draw upon the collective knowledge of your professional network of colleagues, partners, and customers.

- The Home page service provides a consolidated view of your social data from other Connections services.
- The Communities service allows you to stay in touch, share information, exchange ideas, and collaborate on projects with other individuals who share a common interest, responsibility or area of expertise.
- The Profiles service allows you to quickly find people by searching across your organization for people with the expertise and project experience that match your search keywords.
- The Activities service allows you to create online work areas where individuals in your network can gather emails, chats, documents, messages, and other information needed to accomplish a business objective.
- The Wikis service allows you to collaboratively enter, edit, and publish web page content.
- The Blogs service allows you to present your ideas, obtain feedback, and learn from the expertise and experience of others who blog.
- The Files service provides a convenient way to share documents, spreadsheets, presentations, and other types of files without using email.
- The Bookmarks social bookmarking service allows you to save, organize, and share bookmarks. It can also discover bookmarks that have been qualified by other users.

For more information, see the Connections Information Center
<http://publib.boulder.ibm.com/infocenter/ltscnct/v2r0/index.jsp>.

Chapter 6. Samples

Sample reports are included with IBM Cognos Business Intelligence. When installed, you can find them in the Public Folders tab in IBM Cognos Connection.

The Sample Outdoors Company

The Sample Outdoors Company samples illustrate product features and technical and business best practices.

You can also use them for experimenting with and sharing report design techniques and for troubleshooting. As you use the samples, you can connect to features in the product.

For examples related to different kinds of businesses, see the product blueprints at <http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp>. For information about specific installation choices and environments, see the *IBM Cognos Business Intelligence Architecture and Deployment Guide*, or the Proven Practices and the IBM Cognos Implementation Roadmaps on <http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp>. For information about audit samples, see the *IBM Cognos Business Intelligence Administration and Security Guide*. For information about Mobile samples, see the *IBM Cognos Mobile Installation and Administration Guide*.

The Sample Outdoors Company, or GO Sales, or any variation of the Sample Outdoors name, is the name of a fictitious business operation whose sample data is used to develop sample applications for IBM and IBM customers. Its fictitious records include sample data for sales transactions, product distribution, finance, and human resources. Any resemblance to actual names, addresses, contact numbers, or transaction values, is coincidental. Unauthorized duplication is prohibited.

Where to find the samples

The samples are included with the product and the samples for each studio are described in the related user guide and online help. To use the samples, you must install, set up, and configure them or contact your administrator to find out where they are installed. For instructions on how to install the samples, see the *IBM Cognos Business Intelligence Installation and Configuration Guide*. For instructions on how to set up and configure samples, see the *IBM Cognos Business Intelligence Administration and Security Guide* or the *IBM Cognos Business Intelligence Installation and Configuration Guide*.

Samples outline

The samples consist of the following:

- Two databases that contain all corporate data, and the related sample models for query and analysis
- Five samples cubes and the related models
- A metrics data source including associated metrics and a strategy map for the consolidated company, and a model for Metric extracts.
- Reports, queries, query templates, and workspaces

To run interactive reports, scripts are required. To see all the reports included in the samples packages, copy the files from the samples content installation into deployment folder and then import the deployments into the IBM Cognos Business Intelligence product.

Security

Samples are available to everyone. To implement security, see the *IBM Cognos Business Intelligence Installation and Configuration Guide*.

Samples in the GO Data Warehouse (analysis) package

The following IBM Cognos Business Insight report is found in the GO Data Warehouse (analysis) package.

Employee Satisfaction Workspace

This report shows different measures for employee satisfaction, such as investment in training, employee survey results (by department and by topic, including a comparison with the planned survey results), and a list of bonuses for employees, sorted by country or region. The slider filter applies to the bonus list.

Samples in the GO Data Warehouse (query) package

The following IBM Cognos Business Insight workspaces are found in the GO Data Warehouse (query) package.

Marketing workspace

This workspace shows the results of different promotional campaigns.

The select value filter for campaign name applies to the first two charts. The product line select value filter applies to the advertising cost chart, and the year slider filter applies to the advertising cost crosstab.

Recruiting workspace

This workspace shows the recruiting results (average number of days to fill positions) for different indicators: by organization, department, branch, and year, and detailed information about the success of different recruiting techniques.

Two select value filters control three of the widgets.

Revenue data workspace

This workspace shows the revenue by region, country or region, product type, and order method.

The country or region and product type are controlled by a select value filter.

Sales By Year workspace

This workspace shows different sales indicators for a year range controlled by the slider filter: profit margin, gross profit, product cost, quantity sold, revenue by region, and a comparison between actual and planned revenue.

The slider filter controls all widgets.

Interactive samples

The following IBM Cognos Business Insight workspace is found in the Interactive Samples folder.

Sales workspace

This workspace shows different aspects of sales: gross profit by month, region, and product line, revenue by region, and the number of sales representatives that contributed to the sales.

The source objects are based on the GO Data Warehouse (analysis) package and the GO Data Warehouse (query) package. The Sales workspace is interactive: if you move the mouse over any of the widgets, a pop-up window displays ideas about how to improve the workspace.

Appendix. Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products successfully.

See the IBM Accessibility Center (<http://www.ibm.com/able>) for more information about the commitment that IBM has to accessibility.

Accessibility features in IBM Cognos Business Insight

There are several accessibility features in IBM Cognos Business Insight.

The major accessibility features are described in the following list:

- You can use command keys, or shortcut keys, to navigate through Business Insight. Shortcut keys directly trigger an action and usually make use of the Ctrl keys. For example, to save a workspace, press Ctrl+S.
- Business Insight uses Web Accessibility Initiative—Accessible Rich Internet Applications (WAI-ARIA). This means that people with limited vision can use screen-reader software, along with a digital speech synthesizer, to listen to what is displayed on the screen.
- Business Insight supports your system's display settings, such as high-contrast display.

Note: To take full advantage of the accessible features of Business Insight, use Mozilla Firefox version 3.6 and Freedom Scientific JAWS version 12.0.

Business Insight has the following accessibility features that you can use to fit your individual needs:

- “Keyboard shortcuts”
- “Viewing a workspace in Microsoft Windows high contrast mode” on page 117

Keyboard shortcuts

A keyboard shortcut is an alternative way to invoke a command by pressing a combination of keyboard keys.

IBM Cognos Business Insight uses both standard Microsoft Windows navigation keys and application-specific keys.

The following tables list the keyboard shortcuts in IBM Cognos Business Insight for each area of the user interface:

- “General” on page 110
- “Canvas” on page 112
- “Application bar” on page 113
- “Content pane” on page 114
- “Collaboration pane” on page 116
- “Lineage tool” on page 116

General

Applies to	Description	Keyboard shortcut
General	Perform the default action for an active command button.	Enter or Spacebar
General	Go to the first item or object.	Ctrl+Home
General	Go to the last item or object.	Ctrl+End
Screen area	Move forward through the open panes.	F6
Screen area	Move backward through the open panes.	Shift+F6
Screen area	Move to a successively higher toolbar, eventually ending on the first item in the top toolbar. For example, you move from the widget, to the widget toolbar, and then to the application bar.	F10
General controls	Move forward to the next control at the same level.	Tab
General controls	Move backward to the previous control at the same level.	Shift+Tab
Check boxes	Toggle a check box from selected to cleared or cleared to selected. Tip: This shortcut also applies to other settings that can have an on or off state (for example, information card control).	Spacebar
Radio buttons	Move to the next radio button and select it.	Right arrow Down arrow
Radio buttons	Move to the previous radio button and select it.	Up arrow Left arrow
Drop-down lists	Open and display the drop-down list contents.	Alt+Down arrow
Drop-down lists	Close an open drop-down list.	Alt+Up arrow

Applies to	Description	Keyboard shortcut
Tree controls	Move to the first selectable node below, or, if the node below has child nodes and the node is expanded, move to the first child node.	Down arrow
Tree controls	Move to the first selectable node above.	Up arrow
Tree controls	Expand the selected node or move to the first selectable child node.	Right arrow or + (plus sign)
Tree controls	Collapse the selected node, move to the parent node, or move to the first selectable node above.	Left arrow or - (minus sign)
Tree controls	Move to the first node in a tree control.	Home
Tree controls	Move to the last node in a tree control.	End
Menus	Move to and select the next available menu item.	Down arrow
Menus	Move to and select the previous available menu item.	Up arrow
Menus	Expand the child menu items and select the first available child menu item.	Right arrow
Menus	Collapse the child menu items.	Left arrow
Context menus	Open the context menu for the selected item.	Shift+F10
Context menus	Close an open context menu.	Esc
Scrolling	Scroll down.	Down arrow Page down
Scrolling	Scroll up.	Up arrow Page up

Canvas

Applies to	Description	Keyboard shortcut
Widget navigation	Move forward to the next widget on the same level within the canvas.	Tab
Widget navigation	Move backward to the previous widget on the same level within the canvas.	Shift+Tab
Widget navigation	Move to the first widget on the same level within the canvas.	Ctrl+Home
Widget navigation	Move to the last widget on the same level within the canvas.	Ctrl+End
Widget interaction	Move to the first report element at the child level of the current widget.	F12
Widget interaction	Move to the parent level of the current widget.	Shift+F12
Within-widget navigation	Move forward to the next report element in the widget.	Tab
Within-widget navigation	Move backward to the previous report element in the widget.	Shift+Tab
Within-widget navigation	Open the context menu for the selected cell.	Shift+F10
Within-widget navigation	Move the focus to a comment indicator (if available).	Ctrl+Alt+'
Within-widget comment navigation	Move the focus to the next comment in the widget.	Tab
Within-widget comment navigation	Move the focus to the previous comment in the widget.	Shift+Tab
Within-widget comment navigation	Open the current comment to get more information.	Enter or Space
Within-widget comment navigation	Return the focus to the cell that had focus before the focus was moved to a comment indicator.	Esc

Applies to	Description	Keyboard shortcut
Widget actions button	Move to the widget actions button for the selected widget. Tip: Pressing Esc returns to the selected widget.	F10
Widget properties	Open the properties for a selected widget or object.	Alt+Enter
Widget modes	Activate the move mode for the selected widget.	Ctrl+Shift+M
Widget modes	Move a widget. Use arrow keys to move the widget (up, down, left, and right); Ctrl+Arrow keys can move the widget in larger increments.	Arrow keys Ctrl+Arrow keys
Widget modes	Activate the resize mode for the selected widget.	Ctrl+Shift+R
Widget modes	Resize a widget by moving the bottom right corner of the widget.	Arrow keys Ctrl+Arrow keys
Widget modes	Leave the move or resize mode.	Enter Esc

Application bar

Applies to	Description	Keyboard shortcut
Application bar	Create a new workspace.	Ctrl+N
Application bar	Open a workspace.	Ctrl+O
Application bar	Save a workspace.	Ctrl+S
Application bar	Save a workspace as a new workspace.	Ctrl+Shift+S
Application bar	Open the help documentation.	F1
Application bar	Move forward to the next control in the application bar.	Tab

Applies to	Description	Keyboard shortcut
Application bar	Move backward to the previous control in the application bar.	Shift+Tab
Application bar	Move forward through the application bar controls.	Right arrow
Application bar	Move backward through the application bar controls.	Left arrow

Content pane

Applies to	Description	Keyboard shortcut
Navigation	Move to the search field. If it is not already open, the Content pane will display the search results.	Ctrl+F F3
Navigation	Close the Content pane and return to the canvas.	Ctrl+F4
Toolbar	Move to the first item in the toolbar within the Content pane.	F10
Toolbar	Move forward through the toolbar controls.	Tab
Toolbar	Move backward through the toolbar controls.	Shift+Tab
Toolbar	Move forward through the views and select a view.	Right arrow Down arrow
Toolbar	Move backward through the views and select a view.	Left arrow Up arrow
Insert	Insert the selected item into the canvas.	Ctrl+Shift+Enter
Paging	Move to the page controls.	Tab Shift+Tab
Paging	Go to the first page of the Content tab.	Home Ctrl+Shift+Page up Ctrl+Shift+Up arrow

Applies to	Description	Keyboard shortcut
Paging	Go to the last page of the Content tab.	End Ctrl+Shift+Page down Ctrl+Shift+Down arrow
Paging	Go to the next page in the Content tab.	Right arrow Ctrl+Page down
Paging	Go to the previous page in the Content tab.	Left arrow Ctrl+Page up
Content pane	Open or close the Content pane.	Ctrl+Shift+B
Content pane tabs	Move forward through the Content pane tabs. This keyboard shortcut does not work with Microsoft Internet Explorer.	Ctrl+Tab
Content pane tabs	Move backward through the Content pane tabs. This keyboard shortcut does not work with Microsoft Internet Explorer.	Shift+Ctrl+Tab
Information card	Display the information card as part of keyboard navigation of the content tree.	Shift+Alt+F9
Information card	Move focus to the first field in the information card.	Shift+Alt+F9 (in combination with the first Shift+Alt+F9 sequence)
Information card	Move forward and backward through the Information card fields.	Tab Shift+Tab
Information card	Follow a hyperlink in a information card field. The information card closes when the link is accessed.	Enter
Information card	Close the information card and return focus to the Content tab.	Esc

Collaboration pane

Applies to	Description	Keyboard shortcut
Collaboration pane	Open or close the Collaboration pane.	Ctrl+Shift+C
Collaboration pane	Move to the first item in the toolbar within the Collaboration pane.	F10
Activity list	Move up to the previous activity.	Up Arrow
Activity list	Move down to the next activity.	Down Arrow
Activity list	Select the first activity in the list.	Home
Activity list	Select the last activity title in the list.	End
Activity	Move forward to the next item shown in the activity.	Tab
Activity	Move backward to the previous item shown in the activity.	Shift+Tab

Lineage tool

Applies to	Description	Keyboard shortcut
View	Move focus to the next tab.	Tab
View	Move focus to the previous tab.	Shift + Tab
Screen area	Scroll the window contents up.	Up arrow
Screen area	Scroll the window contents down.	Down arrow
Screen area	Scroll the window contents to the left.	Left arrow
Screen area	Scroll the window contents to the right.	Right arrow
Node navigation	Move the focus to the node on the left of the current node.	Ctrl+Left

Applies to	Description	Keyboard shortcut
Node navigation	Move the focus to the node on the right of the current node.	Ctrl+Right
Node navigation	Move the focus to the node above the current node.	Ctrl+Up
Node navigation	Move the focus to the node below the current node.	Ctrl+Down
Node navigation	Move the focus to the previous item within the current node.	Alt+Up
Node navigation	Move the focus to the next item within the current node.	Alt+Down

Viewing a workspace in Microsoft Windows high contrast mode

Microsoft Windows users with low vision can make IBM Cognos Business Insight easier to view by enabling high contrast mode.

For more information, see the documentation for your operating system.

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Glossary

This glossary includes terms and definitions for IBM Cognos Business Intelligence.

The following cross-references are used in this glossary:

- See refers you from a term to a preferred synonym, or from an acronym or abbreviation to the defined full form.
- See also refers you to a related or contrasting term.

To view glossaries for other IBM products, go to www.ibm.com/software/globalization/terminology.

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A

access permission

A privilege that permits the access or use of an object.

accountability scorecard

A scorecard that Metric Studio automatically builds for each user which contains the metrics and projects they own.

agent A process that performs an action on behalf of a user or other program without user intervention or on a regular schedule, and reports the results back to the user or program.

alias An alternative name used instead of a primary name.

anonymous access

A type of access that allows users and servers to access a server without first authenticating with it.

application tier component

For installation, the set of processors that access the query databases to gather information and then render the results as

PDF and HTML reports and metrics.

Application tier components also pass requests to Content Manager and render the results that Content Manager retrieves from the content store.

attribute

In BI Modeling, a characteristic of an entity which is descriptive rather than a unique identifier or an aggregative measure.

authentication

The process of validating the identity of a user or server.

authentication provider

The communication mechanism to an external authentication source. Functionalities, such as user authentication, group membership, and namespace searches, are made available through authentication providers.

B

burst To create several report results by running a single report once. For example, the user can create a report that shows sales for each employee, and run it once, sending different results to regional managers by bursting on region.

burst key

The dimension or level of a query in the report specification that is used to create, or burst, a set of report results.

C

CA See certificate authority.

calculated member

A member of a dimension whose measure values are not stored but are calculated at run time using an expression.

canvas

An area within a dashboard or workspace that users interact with to create, view, and manipulate content and data.

capability

A group of functions and features that

can be hidden or revealed to simplify the user interface. Capabilities can be enabled or disabled by changing preference settings, or they can be controlled through an administration interface.

cardinality

1. For relational data sources, a numerical indication of the relationship between two query subjects, query items, or other model objects.

2. For OLAP data sources, the number of members in a hierarchy. The cardinality property for a hierarchy is used to assign solve orders to expressions.

cascading prompt

A prompt that uses values from a previous prompt to filter the values in the current prompt or pick list.

certificate

In computer security, a digital document that binds a public key to the identity of the certificate owner, thereby enabling the certificate owner to be authenticated. A certificate is issued by a certificate authority and is digitally signed by that authority. See also certificate authority.

certificate authority (CA)

A component that issues certificates to each computer on which components are installed.

CGI See Common Gateway Interface.

cipher suite

The combination of authentication, key exchange algorithm, and the Secure Sockets Layer (SSL) cipher specification used for the secure exchange of data.

class style

A combination of formatting characteristics, such as font, font size, and border, that the user names and stores as a set.

CM See Content Manager.

Common Gateway Interface (CGI)

An Internet standard for defining scripts that pass information from a web server to an application program, through an HTTP request, and vice versa.

condition

An expression that can be evaluated as true, false, or unknown. It can be

expressed in natural language text, in mathematically formal notation, or in a machine-readable language.

constraint

1. A security specification that denies one or more users the ability to access a model component or to perform a modeling or authoring task.

2. A restriction on the possible values that users can enter in a field.

contact

A named e-mail address to which reports and agent e-mails can be sent. Contacts are never authenticated.

content locale

A code that is used to set the language or dialect used for browsers and report text, and the regional preferences, such as formats for time, date, money, money expressions, and time of day.

Content Manager (CM)

The service that retrieves information from the content store, and saves information to the content store.

content store

The database that contains the data needed to operate, such as report specifications, published models, and security rights.

credential

A set of information that grants a user or process certain access rights.

cube A multidimensional representation of data needed for online analytical processing, multidimensional reporting, or multidimensional planning applications.

custom set

In Analysis Studio, a named object which can include filter rules, calculations, and sort rules. Custom sets can define a set of members that is different from any set originally defined in the cube model. See also predefined set, set.

D**dashboard**

A web page that can contain one or more widgets that graphically represent business data.

data source

The source of data itself, such as a database or XML file, and the connection information necessary for accessing the data.

data source connection

The named information that defines the type of data source, its physical location, and any sign-on requirements. A data source can have more than one connection.

data tree

Within a studio, a structure that contains objects such as query subjects, query items, dimensions, levels, and members. A data tree is used as a palette of the available data that can be inserted into calculations, filters, display areas, and other authoring gestures.

deployment

The process of moving an application (such as a report or model) to a different instance. For example, reports are often created in a test environment and then deployed to production. When an application is deployed, it is exported, transferred, and imported.

deployment archive

A file used for deployment. A deployment archive contains the data from the content store that is being moved.

deployment specification

A definition of what packages to move (deploy) between source and target environments, the deployment preferences, and the archive name. Deployment specifications are used for import and export.

derived index

A calculated metric that provides a status and a score based on other metrics.

details-based set

A set based on an item and its immediate details. See also set.

dimension

In Cognos BI and TM1, a broad grouping of descriptive data about a major aspect of a business, such as products, dates, or locations. Each dimension includes different levels of members in one or more hierarchies and an optional set of calculated members or special categories.

dimensional data source

A data source containing data modeled using OLAP concepts, including dimensions, hierarchies, and measures.

drill down

In a multidimensional representation of data, to access information by starting with a general category and moving downwards through the hierarchy of information, for example from Years to Quarters to Months.

E

event A change to a state, such as the completion or failure of an operation, business process, or human task, that can trigger a subsequent action, such as persisting the event data to a data repository or invoking another business process.

event key

A combination of data items that uniquely defines an event instance. Identifying an event instance enables the agent to determine if it is new, ongoing or stopped.

event list

The set of detected event instances evaluated by the task execution rules to determine which agent tasks should be performed.

F

fact See measure.

G**gateway**

An extension of a web server program that transfers information from the web server to another server. Gateways are often CGI programs, but may follow other standards such as ISAPI and Apache modules.

glyph The actual shape (bit pattern, outline) of a character image. For example, italic A and roman A are two different glyphs representing the same underlying character. Strictly speaking, any two images which differ in shape constitute different glyphs. In this usage, glyph is a

synonym for character image, or simply image (The Unicode Standard – Version 1.0).

group A collection of users who can share access authorities for protected resources.

grouping
In reporting, the process of organizing common values of query items together and only displaying the value once.

H

hierarchy
The organization of a set of entities into a tree structure, with each entity (except the root) having one or more parent entities and an arbitrary number of child entities.

I

information card
A display of high-level information about dashboard, workspace, or report content, such as owner, contact information, date modified, and an optional thumbnail view of the dashboard, workspace, or report.

information pane
In Analysis Studio, a pane that helps the user to confirm their selection in the data tree by displaying related information, such as the level and attributes.

initiative
A task developed to achieve objectives or close the gap between performance and targets. Initiatives are associated with individual objectives and often known as projects, actions, or activities.

item See member.

J

job A group of runnable objects, such as reports, agents, and other jobs that the user runs and schedules as a batch.

job step
The smallest part of a job that can be run separately. A job step can be a report or it can be another job.

L

layout The arrangement of printed matter on a screen or page, including margins, line spacing, type specification, header and footer information, indents, and more.

level A set of entities or members that form one section of a hierarchy in a dimension and represent the same type of object. For example, a geographical dimension might contain levels for region, state, and city.

locale A setting that identifies language or geography and determines formatting conventions such as collation, case conversion, character classification, the language of messages, date and time representation, and numeric representation.

M

MDX See Multidimensional Expression Language.

measure
A performance indicator that is quantifiable and used to determine how well a business is operating. For example, measures can be Revenue, Revenue/Employee, and Profit Margin percent.

member
A unique item within a hierarchy. For example, Camping Equipment and 4 Man tent are members of the Products hierarchy.

metric A measure to assess performance in a key area of a business.

metric extract
A set of mappings between an existing Cognos data source and a Metric Studio object or value. For example, a cube measure named Revenue is mapped to a Metric Studio metric named Revenue Actual Value.

metric package
In Cognos Connection, a representation of a Metric Studio application. A metric package contains connection information, reports, and metric management tasks for that application. See also package.

metric store
A database that contains content for

metric packages. A metric store also contains Metric Studio settings, such as user preferences.

metric type

A category of metrics that defines the business rules such as performance pattern, units, and meaning of a group of metrics. For example, Revenue can be a metric type, and European Revenue and North American Revenue would be metrics of this type.

model A physical or business representation of the structure of the data from one or more data sources. A model describes data objects, structure, and grouping, as well as relationships and security. In Cognos BI, a model is created and maintained in Framework Manager. The model or a subset of the model must be published to the Cognos server as a package for users to create and run reports.

multidimensional data source

See dimensional data source.

Multidimensional Expression Language (MDX)

The multidimensional equivalent of Structured Query Language (SQL).

N

named set

See predefined set.

namespace

A part of the model in which the names may be defined and used. Within a namespace, each name has a unique meaning.

news item

A single entry in a Really Simple Syndication (RSS) compatible format. It can include a headline, text, and a link to more information. A news item task in an agent can be used to create news items for display in a Cognos Connection portlet.

O

object In Report Studio, an empty information container that can be dragged to a report from the Toolbox tab and then filled with data. Reports are made up of objects, which include crosstabs, text items, calculations, graphics, and tables.

object extract

An extract that defines the metadata for a Metric Studio object, such as a user defined column, a scorecard, or a data source.

P

package

A subset of a model, which can be the whole model, to be made available to the Cognos server. See also metric package.

page set

In Report Studio, a set of one or more designed pages which repeat in the report output for each instance of a chosen query item. See also set.

passport

Session-based information, stored and encrypted in Content Manager memory, regarding authenticated users. A passport is created the first time a user accesses Cognos 8, and it is retained until a session ends, either when the user logs off or after a specified period of inactivity.

portlet

A reusable component that is part of a web application that provides specific information or services to be presented in the context of a portal.

predefined set

A set of members defined inside an OLAP data source as a list or by an expression. Predefined sets can be used in analysis and report authoring. See also custom set, set.

product locale

The code or setting that specifies which language, regional settings, or both to use for parts of the product interface, such as menu commands.

project

1. In Metric Studio, a task or set of tasks undertaken by a team and monitored on a scorecard. A project tracks dates, resources, and status.
2. In Metric Designer, a group of extracts. Each extract contains the metadata that is used to populate the Metric Studio data store or to create applications.

prompt

A report element that asks for parameter values before the report is run.

properties pane

Within a studio, a pane that provides an overview of the properties for selected data. The properties pane can also be used to make several changes and apply them at the same time, instead of repeating several different commands.

publish

In Cognos BI, to expose all or part of a Framework Manager model or Transformer PowerCube, through a package, to the Cognos server, so that the data can be used to create reports and other content.

Q

query The simple report specifications created and edited by Query Studio.

query item

A representation of a column of data in a data source. Query items may appear in a model or in a report and contain a reference to a database column, a reference to another query item, or a calculation.

query subject

A named collection of query items that are closely functionally related. Query subjects are defined using Framework Manager to represent relational data and form the set of available data for authoring reports in Query Studio and Report Studio. A query subject is similar to a relational view in that it can be treated as a table but does not necessarily reflect the data storage.

R**Really Simple Syndication (RSS)**

An XML file format for syndicated Web content that is based on the Really Simple Syndication specification (RSS 2.0). The RSS XML file formats are used by Internet users to subscribe to websites that have provided RSS feeds. See also Rich Site Summary.

repeater

In Report Studio, a cell container that

repeats values within itself with no predefined internal structure.

repeater table

In Report Studio, a table-like container that repeats cells across and down the page or row in the associated query.

report A set of data deliberately laid out to communicate business information.

report output

The output produced as a result of executing a report specification against a data set.

report specification

An executable definition of a report, including query and layout rules, which can be combined with data to produce a report output.

report view

A reference to another report that has its own properties, such as prompt values, schedules, and results. Report views can be used to share a report specification instead of making copies of it.

response file

An ASCII file that can be customized with the setup and configuration data that automates an installation. The setup and configuration data would have to be entered during an interactive install, but with a response file, the installation can proceed without any intervention.

Rich Site Summary (RSS)

An XML-based format for syndicated web content that is based on the RSS 0.91 specification. The RSS XML file formats are used by Internet users to subscribe to websites that have provided RSS feeds. See also Really Simple Syndication.

RSS

1. See Really Simple Syndication.
2. See Rich Site Summary.

S

score A number or ranking that expresses applicability in relation to a standard.

scorecard

A collection of metrics representing the performance of one unit or aspect of an organization.

scorecard structure

The hierarchy of scorecards that reflects how an enterprise organizes its metrics.

security provider

See authentication provider.

selection-based set

A collection of individual items that the user has explicitly selected. The items or members may be selected from one or more levels of the same hierarchy. See also set.

session

The time during which an authenticated user is logged on.

set

A collection of related items or members. Members in a set may be specifically chosen, or selected by one or more filter rules. See also custom set, details-based set, page set, predefined set, selection-based set, stacked set.

stacked set

Two or more sets arranged one above another in rows or side-by-side in columns. See also set.

strategy

The overall plan of action (such as for a brand unit, business unit, channel, or company) to achieve a stated goal. Strategies normally cover a period of more than one year.

strategy map

In Metric Studio, a visual representation of the strategy and the objectives of that strategy for an organization. For example, a strategy map may show employees how their jobs are aligned to the overall objectives of the organization.

summary

In reporting and analysis, an aggregate value that is calculated for all the values of a particular level or dimension. Examples of summaries include total, minimum, maximum, average, and count.

T**task**

An action performed by an agent if the event status meets the task execution rules. For example, an agent can send an e-mail, publish a news item, or run a report.

task execution rule

A user-specified option within an agent that determines which statuses and values cause a task to be run. It determines which tasks to execute for each event instance.

template

In report authoring, a reusable report layout or style that can be used to set the presentation of a query or report.

thumbnail

An icon-sized rendering of a larger graphic image that permits a user to preview the image without opening a view or graphical editor.

tuple

An ordered collection of two or more members from different dimensions. For example, the tuple (2007, Camping Equipment, Japan) returns the value for the intersection of the three members: 2007, Camping Equipment, and Japan. Tuples can be used to filter and sort data, and to create calculations.

U**union set**

See stacked set.

user

Any individual, organization, process, device, program, protocol, or system that uses the services of a computing system.

user-defined column

In metric management, a column used to represent a value other than the actual or target. It may be an industry benchmark or any other useful additional numerical information for a period, including a calculation based on the other values of the metric. User-defined columns may be different for each metric type.

W**watch list**

A list of metrics that each user has chosen to monitor closely. If notification is enabled in Metric Studio, the user will receive e-mail notification of changes to these metrics. Users can also choose to display their watch list as a portlet within Cognos Connection.

watch rule

A user-defined condition that determines

whether a report is delivered to the user. When the rule is run, the output is evaluated and, if it satisfies the condition or rule, the report is delivered by e-mail or news item. Watch rules limit report delivery to those reports containing data of significance to the user.

Web Services for Remote Portlets

A standard for creating presentation-oriented web services so that they can be easily integrated within other applications, such as web portals.

widget

A portable, reusable application or piece of dynamic content that can be placed into a Web page, receive input, and communicate with an application or with another widget.

work area

The area within a studio that contains the report, analysis, query, or agent currently being used.

workspace

See dashboard.

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