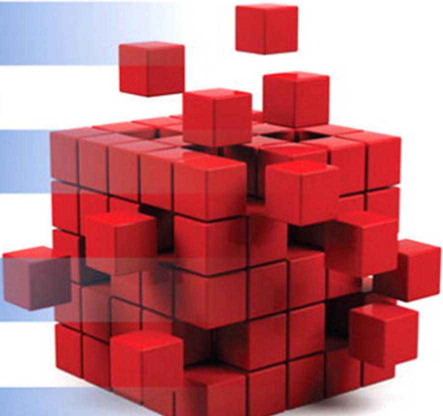
IBM Press

# IBM Cognos Business Intelligence v10

## The Complete Guide

Sangeeta Gautam



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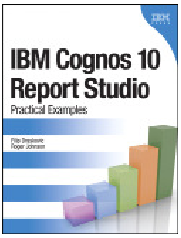


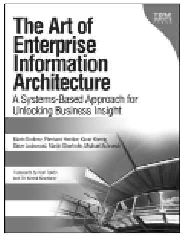

## IBM Cognos 10 Report Studio
### Practical Examples

By Filip Draskovic and Roger Johnson

ISBN: 0-13-265675-2

Take your IBM Cognos 10 reporting skills to the next level with insider techniques from top IBM Cognos trainers. In this book, two leading IBM Cognos instructors show experienced users how to create better reports with less effort and take full advantage of IBM Cognos 10's most valuable improvements. The authors walk through dozens of detailed examples built in response to actual business reporting challenges. Their step-by-step examples illuminate everything from report design and formatting to queries and statistical analysis—and every example is designed for easy modification.

*IBM Cognos 10 Report Studio: Practical Examples* shows how to quickly generate complex crosstab calculations and build interactive dashboards that illuminate management's key metrics. Take full advantage of the IBM Cognos report hierarchy and layout library. Compare legacy report queries to IBM Cognos Framework Manager data models, combine multiple queries in one complex report, provide access to interactive reports to users who aren't connected to your servers, and retrieve complex statistical analyses via IBM Cognos Statistics.




## The Art of Enterprise Information Architecture
### A Systems-Based Approach for Unlocking Business Insight

By Mario Godinez, Eberhard Hechler, Klaus Koenig, Steve Lockwood, Martin Oberhofer, and Michael Schroeck

ISBN: 0-13-703571-3

Architecture for the Intelligent Enterprise: Powerful New Ways to Maximize the Real-Time Value of Information

In this book, a team of IBM's leading information management experts guide you on a journey that will take you from where you are today toward becoming an "Intelligent Enterprise."

Drawing on their extensive experience working with enterprise clients, the authors present a new, information-centric approach to architecture and powerful new models that will benefit any organization. Using these strategies and models, companies can systematically unlock the business value of information by delivering actionable, real-time information in context to enable better decision-making throughout the enterprise—from the "shop floor" to the "top floor."

Sign up for the monthly IBM Press newsletter at ibmpressbooks/newsletters through prompted report objects. You can remove a filter from the widget only if it has a delete (X) icon on the right side of the filter. Those filters that were applied outside of *Cognos Workspace* show grayed out or with a lock. You cannot delete these filters.

Similarly, you can see in the *Information bar* the sort conditions that have been applied to the widget report. The sort conditions can be those that were applied from within *Cognos Workspace* by using the widget sort options or may have been sorted by the reporting tool outside of *Cognos Workspace*. Similar to filters, you can remove the sort condition only if has a delete (X) icon on the right side of the sort condition.

The Sort and Filter conditions are included in the report when the report widget is printed or exported to Microsoft Excel 2007 or PDF.

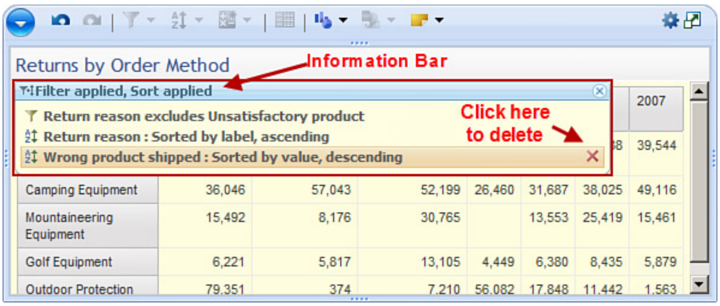



**Figure 8.5** Information bar displaying the applied Filter and Sort applied to Returns by Order Method.

## Widget Actions Menu

Every widget has a *Widget Actions* menu that provides options specific to that widget only. The *Widget Actions* menu becomes visible and available only when you click the widget and bring it to focus. Refer to Figure 8.2 to see that the *Widget Actions menu* is only visible for the chart *Correlation between Region and Products* at this time. Some of the options available to you in this menu are *Remove from Workspace*, *Print as PDF*, *Export to PDF*, *Excel 2007*, *Excel 2002*, *CSV or XML*, *Versions*, *Refresh*, *Prompt Again*, *Reset*, *Listen for Widget Events*, *Resize to Fit Content*, *Send to Back*, *Do More...*, and *Properties*.

You explore these options in greater detail later in this chapter.

## On Demand Toolbar

Every widget has an *On Demand toolbar* with an *Actions* menu that becomes available and visible for the currently selected widget (refer to Figure 8.2). The options available in the widget vary depending upon the type of widget.

## Explore Application Bar Options

Additional options are available to you from the *Application bar*. Some of the actions in the *Application bar* are also available to you from the *Actions* menu. If you have *Lotus Connections* configured in your environment, an icon will be available for collaboration. The sections that follow explore these options in more detail. The options are covered in the sequence they appear on the *Application bar*.

### New Workspace

Use the New Workspace option to create a new *Cognos Workspace* workspace:

1. On the **Actions Menu**, click the **New Workspace** icon.
2. In the **Content pane** on the right, navigate to **Public Folders** > **SampleOutdoor Reports** folder > **Product Forecast** > **List1** report part.
3. Drag and drop **List1** on to the workspace.

   **NOTE:** If you have not performed the activities in previous chapters, you may not have a folder SampleOutdoorReports and Product Forecast report. You may navigate to **Public Folders** > **Samples** > **GO Data Warehouse (analysis)** > **Report Studio Report Samples** > **Customer Returns and Satisfaction** > **List1**.

### Open

Use this option to open an existing *Cognos Workspace* workspace.

### Save

Use this option to save your workspace.

### Email Link

You can email the link to your workspace to others in your organization. Users must have permissions to view the workspace. When you click the option *Email Link...* icon, the link to the workspace is automatically pasted in your default email client with the workspace name in the subject line, as shown in Figure 8.6.

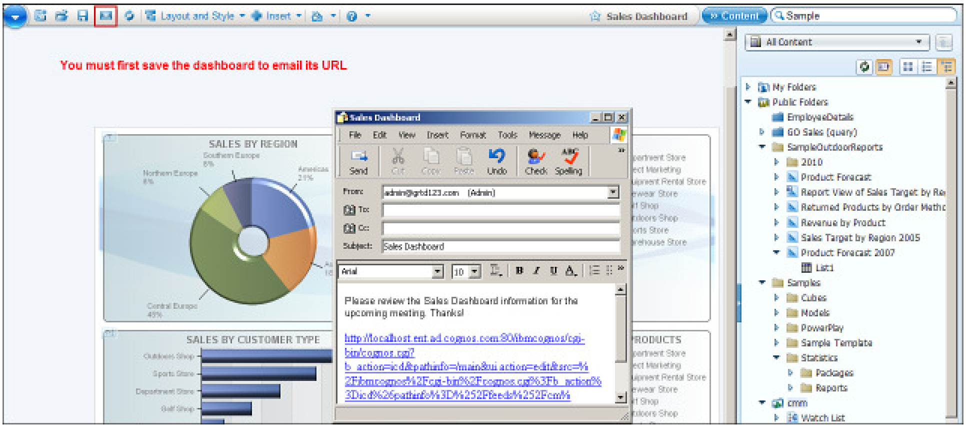



**Figure 8.6** Email Sales Dashboard via IBM Cognos Workspace.

## Collaborate

You can launch *Lotus Connections* from *Cognos Workspace* and collaborate with others.

This option appears as a drop-down list and in the Application bar and provides two options:

- Start an Activity
- View/Hide Dashboard Activities

The *Collaborate* option enables you to create activities using *IBM Lotus Connections*. *Activities* enable you to create and assign to-do items, post messages, and share files. You can also use other social software capabilities such as wikis, blogs, and communities to collaborate with others.

### Start an Activity

Use the *Start an Activity* option to create an activity for the workspace. The *Start an Activity* window opens requesting a userid and password. When successfully logged on, you can accomplish the following:

- Start creating your activity.
- Give your activity a name.
- Describe the goal of the activity.
- Provide tags for easy search.
- Activity due data.
- Include the list of people you want to work with on this activity and identify them as owner, author, or reader in the Member options.

You can search for people while including people in the activity. When the person with the name you were searching for is found, a name card becomes available with the details of the person. Use this to ensure you are selecting the correct Mary Miller if there are multiple people with the same name in your organization. There are some templates already available to use rather than creating your own. Typing in the template name searches for templates with similar names and narrows your search list. However, you may opt not to use it if you do not want to do so. After you have assigned the activity to other people, they can see the activity in their to-do list.

To start an activity, click the **Collaborate** icon on the **Application bar**, and choose **Start an Activity**. When you create an activity, you can specify an activity title, activity goal, tags, due date, and specify members to be owner, author, or reader, and so on.

When you click **Save,** the browser for **Start an Activity** displays. All the activities that you have access to are listed as shown in Figure 8.7.

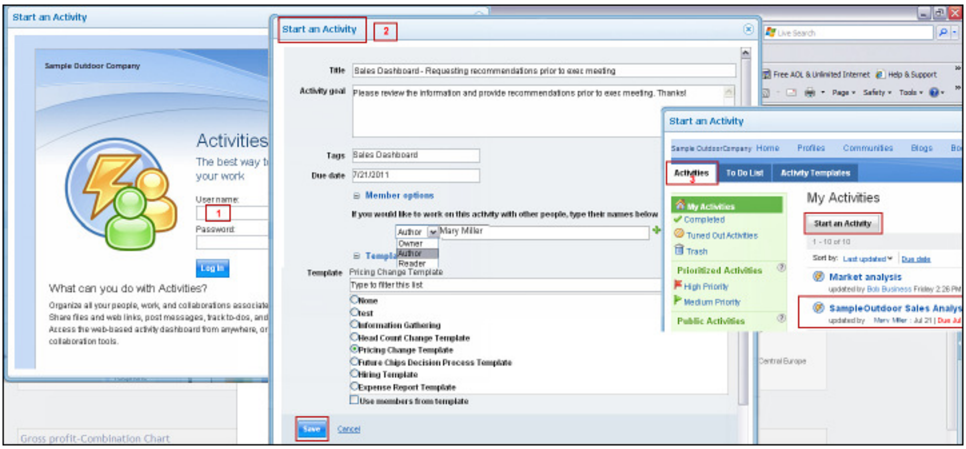



**Figure 8.7** Collaboration Options – Working with Activities in Lotus Connections.

In addition, you can leverage work with other social collaboration features such as blogs, files, and wikis to explore and enhance your recommendations and findings by working as a team together. Figure 8.8 shows additional options available to you, for example, *Profiles*, *Communities*, *Blogs*, and *Bookmarks* that you can use for collaborating with others.

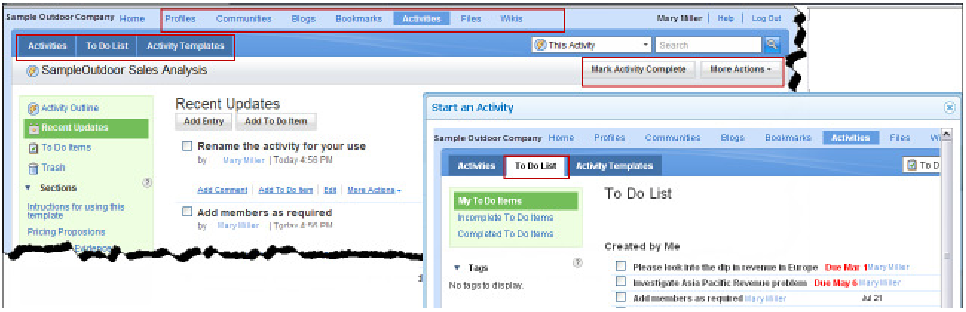


**Figure 8.8** Collaboration Options – Lotus Connections options and interface.

Figure 8.9 shows that the **View/Hide Workspace Activities** option works as a toggle. Choosing this option once shows you all the activities that have been defined on this workspace in the *Workspace Activities pane*, at the bottom of the screen. Choosing this option again hides the Activities pane from the bottom of the screen. You can also see the activities generated by other users. In *Lotus Connections*, you can see the activities you have access to, not just the ones associated with the currently opened workspace. You can click the activity for more details. In the *Activities pane* there is a link to the workspace.

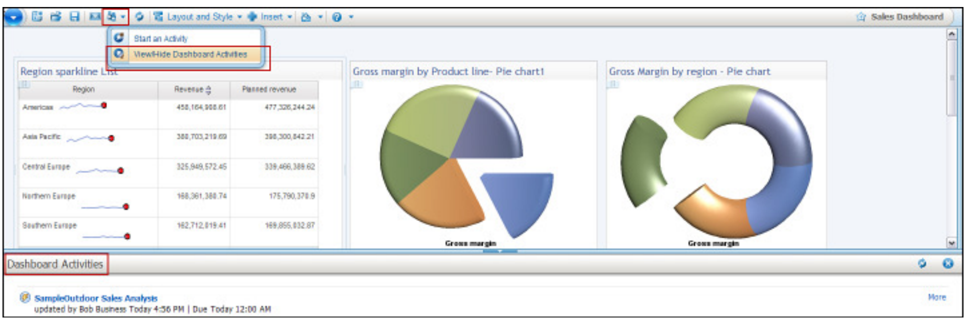


**Figure 8.9** View all workspace activities set up via IBM Cognos Cognos Workspace.

Later you see that you can also collaborate with others by adding comments and annotations to reports.

## Refresh Workspace

The **Refresh All** option from the Application bar refreshes all workspace content. Every widget in the workspace will be refreshed.

**NOTE:** To refresh the content of an individual widget, use the Refresh option from the Widget Actions menu.

## Edit Workspace Style...

The **Edit Workspace Style...** option enables you to modify the workspace style, that is, background color of the workspace and widget properties. *Cognos Workspace* provides free form layout with gridlines to help you align the widgets. As you move the widgets in the canvas, you notice the gridlines appear horizontally and vertically, and can use them to align your widgets in the workspace canvas.

There are three options available to you from here:

- Fit All Widgets to Window
- Arrange All Widgets to Fit Content
- Edit Workspace Style...

The sections that follow describe these options in more detail.

### Fit All Widgets to Window

When you drag and drop items from the *Content pane* into your workspace, the widgets are automatically sized to fit the content within them. When you use this option, all the widgets on your workspace are resized to fit the current browser window. Depending on the number of widgets on the workspace, scroll bars may appear in the widgets where appropriate.

To fit all widgets to a window, you must first click the **Layout and Style** icon on the **Application bar**, and then choose **Fit All Widgets to Window**.

### Arrange All Widgets to Fit Content

Use the **Arrange All Widgets to Fit Content** option to fit all the content of the report part into the widget. All widgets are rearranged to avoid overlapping of widgets. Depending on the number of widgets and their size, some of them may have scroll bars where appropriate. You can also accomplish the same thing via the *Resize to Fit Content* option in the *Widget Actions* menu. To arrange all widgets to fit content, click the **Layout and Style** icon on the Application bar, and choose **Arrange All Widgets to Fit Content**.

### Edit Workspace Style...

The **Edit Workspace Style...** option has two tabs: one for Tabs and Global Area settings and the other for Widget properties, as shown in Figure 8.10.

On the **Tabs and Global Area** tab, you can define the background of the workspace by changing the **background color** or **background image**. For a page color, you can choose from **None** or **Set Color....** in the drop-down list. Clicking the **Set Color...** option brings up the *Set Color* window, which enables you to choose a **Palette** color or a tab to define **Custom** color. Custom color requires that you provide a color value as a named value or hexadecimal value.