Getting Started
Product Information
This document applies to IBM Cognos 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 Intelligence (BI). IBM Cognos BI is a Web product with integrated reporting, analysis, scorecarding, and event management features.

Using This Document

This document introduces the IBM® Cognos® Business Intelligence (BI) architecture and provides examples to illustrate key functionality.

The following products are part of the IBM Cognos Performance Management solution, and are not discussed in this document:

- **IBM Cognos Controller**
  IBM Cognos Controller is a Web-based financial consolidation tool that provides standard reports to support both statutory and management reporting.
  For more information, see the IBM Cognos Controller User Guide.

- **IBM Cognos Workforce Performance**
  IBM Cognos Workforce Performance is a next-generation analytic application geared to helping organizations optimize their human capital management. It is the first analytic application to capitalize on the open modern architecture of IBM Cognos Business Intelligence. It provides human resources executives and managers with a complete spectrum of packaged reports on key, configurable workforce measures to help improve planning and management decisions.
  For more information, see the IBM Cognos Adaptive Analytics User Guide and the IBM Cognos Adaptive Warehouse User Guide.

- **IBM Cognos Planning**
  IBM Cognos Planning provides the ability to plan, budget, and forecast in a collaborative, secure manner. There are two major components: IBM Cognos Planning Analyst and IBM Cognos Planning Contributor.
  For more information, see the IBM Cognos Planning Analyst User Guide and the IBM Cognos Planning Contributor Administration Guide.

Audience

This document is intended for users who are new to IBM Cognos Business Intelligence.

Finding information

To find IBM® Cognos® product documentation on the web, including all translated documentation, access one of the IBM Cognos Information Centers at http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp. Updates to Release Notes are published directly to Information Centers.
You can also read PDF versions of the product release notes and installation guides directly from IBM Cognos product disks.

**Using quick tours**

Quick tours are short online tutorials that illustrate key features in IBM Cognos product components. To view a quick tour, start IBM Cognos Connection and click the Quick Tour link in the lower-right corner of the Welcome page. Quick Tours are also available in IBM Cognos Information Centers.

**Accessibility features**

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

**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 used to develop sample applications for IBM and IBM customers. These 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. Other sample files may contain fictional data manually or machine generated, factual data compiled from academic or public sources, or data used with permission of the copyright holder, for use as sample data to develop sample applications. Product names referenced may be the trademarks of their respective owners. Unauthorized duplication is prohibited.
Chapter 1: IBM Cognos Business Intelligence

IBM® Cognos® Business Intelligence is an integrated business intelligence suite that provides a wide range of functionality to help you understand your organization’s data. Everyone in your organization can use IBM Cognos BI to view or create business reports, analyze data, and monitor events and metrics so that they can make effective business decisions.

IBM Cognos BI integrates the following business intelligence activities in one Web-based solution.

Before you use IBM Cognos BI, you should understand how each of the components that make up the IBM Cognos BI user interfaces can help you do your job.

<table>
<thead>
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<th>Activity</th>
<th>Component</th>
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<tr>
<td>Publishing, managing, and viewing content</td>
<td>IBM Cognos Connection</td>
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<td>Interactive dashboards</td>
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<td>Ad hoc querying</td>
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<td>Working with IBM Cognos BI content in Microsoft Office</td>
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</table>

For more information about how IBM Cognos BI products work together, see "How IBM Cognos Business Intelligence Works" (p. 11).

You will also want to know how to use IBM Cognos Connection and the IBM Cognos Administration console to view and organize content (p. 14), set up administration (p. 15) and security (p. 16), and schedule content (p. 16).

If you are building IBM Cognos BI applications, you may want to understand the IBM Cognos software development kit (p. 16) and workflow (p. 17).

Depending on your licensing permissions, you may not have access to all the functionality available in IBM Cognos BI.
IBM Cognos Connection

IBM® Cognos® Connection is the Web portal for IBM Cognos Business Intelligence. It is the starting point to access your BI information and the functionality of IBM Cognos BI. Use the portal to publish, find, manage, organize, and view your organization’s business intelligence content, such as reports, scorecards, and agents. If you have the necessary permissions, you can access the various studios from the portal and use the portal for content administration, including scheduling and distributing reports, and creating jobs.

You view reports in IBM Cognos Viewer.

System administrators also use the portal to administer servers, optimize performance, and set access permissions.

For information about using IBM Cognos Connection, see "Example - Run a Report" (p. 19), "Example - Schedule a Report" (p. 22), and "Example - Create a Portal Page" (p. 24).

Business Insight

IBM® Cognos® Business Insight allows you to build and use sophisticated, interactive dashboards using IBM Cognos content, as well as external data sources.

A dashboard is a visual display of the most important information that you need to quickly gain insight about your business objective. You can monitor a dashboard at a glance. In Business Insight, objects that you add to a dashboard are displayed in widgets. These widgets contain content and interact with each other.

Within a Business Insight dashboard, you work with existing content and perform basic analysis, data exploration, and collaborative decision making. You can also perform enhanced searches of IBM Cognos Business Intelligence content to quickly find relevant information presented in reports, analyses, dashboards, metric information, and events.

Business Insight Advanced

IBM® Cognos® Business Insight Advanced allows you to author simple reports and explore your data. When you are in an IBM Cognos Business Insight dashboard and want to perform deeper analysis and report authoring, you can seamlessly graduate to Business Insight Advanced, where you can perform more advanced data exploration, such as adding additional measures, conditional formatting, and advanced calculations. You can also launch Business Insight Advanced directly from the IBM Cognos Connection portal.

With Business Insight Advanced, you can create reports with relational or dimensional data sources, and that show data in lists, crosstabs, and charts. You can also use your own external data source.

When you are using Business Insight Advanced, if you open a report that was authored in IBM Cognos Report Studio, you can see the objects that can be inserted only in Report Studio, such as map. However, you cannot modify these objects.

For more information about using Business Insight Advanced, see "Example - Create a Statement-Style Report" (p. 32).
Report Studio

IBM® Cognos® Report Studio is a report authoring tool that professional report authors and developers use to create sophisticated and managed reports. With Report Studio, users can create any business intelligence report that an organization requires, such as weekly sales and inventory reports, with any data source (relational or multidimensional).

Use Report Studio for reports that
- are intended for a wide audience
- exist long enough to require maintenance for changing requirements and data
- require detailed control over the appearance

Report Studio provides powerful functionality, such as bursting, prompts, maps, and advanced charting, and provides many ways to customize reports.

For more information about using Report Studio see "Example - Create a Report" (p. 36).

Query Studio

IBM® Cognos® Query Studio is the reporting tool for creating simple queries and reports in IBM Cognos Business Intelligence. A casual or novice user can use Query Studio to create self-serve reports that answer simple business questions.

With minimal steps, you can view data, author basic reports, change the report layout, filter and sort data, add formatting, and create charts.

When you use Query Studio, you interact directly with your data. With Query Studio, you can work only with relational data sources.

For information about using Query Studio, see "Example - Create a Query" (p. 27).

Event Studio

IBM® Cognos® Event Studio is the notification tool used to alert decision-makers in your organization of events as they happen, so that they can make timely and effective decisions.

You can use Event Studio to create agents that monitor status changes, priority customers, your organization’s data to detect occurrences of business events, or any other factor that is important to your business.

Specify the event condition, or a change in data, that is important to you. When an agent detects an event, it can perform tasks, such as sending an email, adding information to the portal, and running reports.

For information about using Event Studio, see "Example - Manage an Event" (p. 40).
**Metric Studio**

IBM® Cognos® Metric Studio is the scorecarding and metrics tool in IBM Cognos Business Intelligence. You can use Metric Studio to create a customized scorecarding environment to monitor and analyze business metrics throughout your organization. Metric Studio helps you translate your organization's strategy into relevant, measurable goals that align each employee's actions and accountability with a strategic plan.

The rich scorecarding environment of Metric Studio shows you where your organization is successful and where it needs improvement. It tracks performance against predetermined targets and indicates the current status of the business so that decision makers at every level of the organization can react and plan.

With Metric Studio, you can readily see how the organization is progressing against its strategy. You can set priorities for your own actions and understand how your decisions affect the performance of the company.

You can use the flexibility of Metric Studio to model metrics and their relationships based on any standard or proprietary scorecarding and management methodology that you already use.

For information about using Metric Studio, see "Example - Monitor Performance" (p. 44).

**Analysis Studio**

Managers and analysts use IBM® Cognos® Analysis Studio to better understand their business and to get answers to questions that they have about their business. Users can quickly and easily perform analysis to get to the what and why behind an event or action so that they can improve business performance.

With analysis, it is possible to see trends and understand anomalies or variances that may not be evident with other types of reporting. Analysis Studio users can easily focus on what is important even with large volumes of dimensional data.

When you use Analysis Studio, you interact directly with visible data. With Analysis Studio, you can work only with dimensional data sources.

For information about using Analysis Studio, see "Example - Create an Analysis" (p. 49).

**IBM Cognos for Microsoft Office**

When you use IBM® Cognos® for Microsoft® Office, you can work with secure IBM Cognos Business Intelligence content in your familiar Microsoft Office environment. You can retrieve report content from a variety of IBM Cognos applications, including IBM Cognos BI and IBM Cognos PowerPlay®. IBM Cognos for Microsoft Office provides access to all IBM Cognos report content, including data, metadata, headers, footers, and charts. You can use predefined reports, or create new content using IBM Cognos Query Studio, IBM Cognos Analysis Studio, or IBM Cognos Report Studio.

By importing content into Microsoft Excel spreadsheet software, you can work with the data and leverage Microsoft Excel's formatting, calculation, and presentation capabilities. You can also use the formatting and charting features of Microsoft Excel.
By importing content into Microsoft PowerPoint and Microsoft Word, you can include reports and charts to enhance your presentations and documents.

For more information about IBM Cognos for Microsoft Office, see "Example - Work with IBM Cognos Content in Microsoft Excel" (p. 53).

**Transformer**

IBM® Cognos® Transformer is a multi-dimensional data modeling component designed for use with IBM Cognos 8.3 and subsequent releases.

You use this component to create a multi-dimensional model: a business presentation of the information in one or more different data sources that share common data. After you add the needed metadata from IBM Cognos Business Intelligence packages, reports, and other various data sources, model the dimensions, customize the measures, and apply IBM Cognos BI secured views with dimensional filtering, you can create IBM Cognos PowerCubes based on this model. You can deploy these cubes to support OLAP reporting and analysis around the globe.

**How IBM Cognos Business Intelligence Works**

When you view or create a report, you are viewing and manipulating data stored in your organization’s databases. The following diagram explains the steps involved in using IBM® Cognos® Business Intelligence.
1. In IBM Cognos Framework Manager, the modeler ensures that metadata is presented in a manner that business users can understand. Modelers import the metadata from one or more databases, and then add to the model to meet user requirements.

2. In IBM Cognos Metric Designer, the modeler identifies the data items and calculations that form the targets and actual results for each metric.

3. The modeler then publishes and updates packages to IBM Cognos Connection so that authors can use them to create reports, agents, and scorecards.
4. Business users and report authors use the published packages to understand their business data.

5. Users run, view, and manage their content in IBM Cognos Connection. Depending on their security permissions, they may be able to simply run and view reports or manage schedules, portal layout, and other users’ permissions.

6. In IBM Cognos Transformer, you can leverage queries in published packages, queries from IBM Cognos BI reports, and personal data sources, such as Microsoft® Excel spreadsheet software, to create a unique, focused model of your business. Transformer is IBM Cognos’s industry leading OLAP modeling tool, which is designed so that business users can be self-sufficient in modeling a view of the business that suits the needs of their department or specialty.

For more information, see the IBM Cognos Architecture and Deployment Guide.

Report Specifications
When authors create a report, they are actually creating a report specification. The report specification is an XML representation of the queries and prompts that are used to retrieve data, as well as the layouts and styles used to present the data. For simplicity, the report specification is called the report.

Report specifications can be useful to report authors for troubleshooting.

For information about working with report specifications, see the IBM Cognos Report Studio User Guide or the IBM Cognos Business Insight Advanced User Guide, and the IBM Cognos Software Development Kit Developer Guide.

Models and Packages
Because stored data is typically designed for storage and not for reporting, a data modeler uses Framework Manager to create metadata models. A model structures, adds to, and manages data in ways that make sense to business users. For example, a model defines business rules, data descriptions, data relationships, business dimensions and hierarchies, and other administrative tasks.

Planning and creating a model is an important task that should be performed by a modeler or a modeling team familiar with both the database structure and the needs of the business users.

After the metadata model is defined, modelers create a package to make metadata available to report authors. Each package must contain all the information that a specific user or group of users needs to create reports. For example, one package can contain human resources data, and another sales data. When users open an authoring studio, they must select which package to use. Each report can contain data from only one package.

After a package is made available in IBM Cognos Connection, the Transformer modeler can begin to design a multidimensional IBM Cognos PowerCube for a more focused analysis of the business. The queries can be created directly in Transformer using metadata from any published package. Business specialists can also design their own model for a more focused analysis, combining metadata from different packages and even including personal data using flat files.

A more refined query intended for Transformer modeling can be authored by a business specialist by creating a report in IBM Cognos Query Studio or Report Studio. That report can then be used to create a data source in Transformer, allowing the business specialist full control over changes to the report, and therefore the query, rather than relying on the Framework Manager administrator for changes. Once the multi-dimensional design is complete, IBM Cognos BI security can be added with dimensional filtering and the PowerCube can be built. The PowerCube can then be published
to IBM Cognos Connection just like any other package, making it available for multi-dimensional analysis and reporting.

For information about data modeling, see the Framework Manager User Guide, the Metric Designer User Guide, or the IBM Cognos Transformer User Guide.

Viewing and Organizing Content

When you view and run a report, scorecard, or agent, the information that you see comes from data sources, the package, calculations, other properties added by the author, and from IBM® Cognos® Business Intelligence itself.

You use IBM Cognos Connection to organize your reports and other IBM Cognos content such as agents, metrics packages, URLs, and folders. You can access public content on the Public Folders tab or custom portal pages, and store and access your favorite content on the My Folders tab.

Report and Agent Views

If you want to personalize an existing public report or agent, you can create a report or agent view and save the view on the My Folders tab. This allows you to save prompt values, modify the schedule, and change the output format of reports.

For more information, see the online help in IBM Cognos Connection.

Report Outputs

When a report is run, it contains the latest data from the data source. However, viewing the most recent data may not always meet your needs. When you want to view older data, you save and view the report output.

Report outputs are created when you schedule a report, when a report has multiple formats or languages, when a report has a delivery method of save, print, or email, and when a report is burst.

You can produce report outputs in the following formats:

- HTML
- PDF
- Microsoft® Excel spreadsheet
- delimited text (CSV)
- XML

If you are the owner of a report or have the necessary permissions, you can specify the default format for each report. You can also specify how many report output versions to keep.

For more information, see the online help in IBM Cognos Connection.

Drill-through Links

A report can contain drill-through links, also known as Go To links, so that you can easily open related content. A value in the report is linked to more detailed information in another report. For
example, a report includes sales information for each continent. When you click a continent name, a more detailed report about sales for that specific continent opens.

When you view report data in IBM Cognos Connection, IBM Cognos Query Studio, and IBM Cognos Analysis Studio, you can also drill down and drill up. When you drill down, you follow a link from one layer of data to a more detailed layer within the same report. When you drill up, you access a less detailed layer.

For more information, see the online help in IBM Cognos Connection, Query Studio, or Analysis Studio.

Multilingual User Interface and Content

IBM Cognos BI is a multilingual suite that lets you author reports once and deploy them globally. When users open a report, it automatically opens in the proper language, based on their locale settings.

You can select the language that you prefer for the user interface. If your data and reports are available in multiple languages, you can also select the language that you prefer for the content.

To deliver multilingual content, you can create each entry with multilingual properties in the appropriate studio.

For more information about the multilingual capabilities of IBM Cognos BI, see the online help in IBM Cognos Connection or see the IBM Cognos Architecture and Deployment Guide.

Portal Pages

In IBM Cognos Connection, you can create your own custom portal pages. You use these portal pages to view frequently-used content, to group related reports and folders, and to combine IBM Cognos BI and non-IBM Cognos content within a single page. Within your portal pages, you can add IBM Cognos BI portlets, which you use to view and interact with your IBM Cognos BI content.

If you have the necessary permissions, you can create public pages that other users and groups can access and even use as their own. You can assign security permissions to allow only certain users to access the pages.

For more information, see the online help in IBM Cognos Connection.

Administration of IBM Cognos Business Intelligence

IBM® Cognos® Business Intelligence administrators ensure that IBM Cognos BI runs smoothly and at its optimum performance. They can

- define connections to the organization’s data sources
- define security permissions for users and groups in the organization
- specify distribution lists, contacts, and printers
- manage servers and dispatchers and fine-tune the performance of IBM Cognos BI
- pre-define links for an entire package that authors can then easily add to their reports
- customize the appearance and functionality of IBM Cognos BI
Security

IBM Cognos BI is secured by setting permissions and enabling user authentication. When anonymous access is enabled, you can use IBM Cognos BI without authenticating as a specific user.

In IBM Cognos BI, administrators define permissions so that users can access functionality. For example, to edit a report using IBM Cognos Report Studio, you must have the appropriate security and licensing permissions.

In addition, each entry in IBM Cognos Connection is secured to define who can read, edit, and run the entry.

For more information, see the online help in the IBM Cognos Administration console.

Scheduling Content

You can schedule most content that appears in IBM Cognos Connection to run at a time that is convenient for you.

You can schedule

- reports
- metrics
- metrics data refreshes
- agents
- deployments

You can also create jobs to schedule multiple entries together.

For more information, see the online help in IBM Cognos Connection.

The IBM Cognos Software Development Kit

The IBM Cognos Software Development Kit provides a platform-independent automation interface for working with IBM Cognos BI services and components. Developers in your organization can use the IBM Cognos Software Development Kit to create custom reports, manage deployment, and integrate security and portal functionality to suit your needs, locale, and existing software infrastructure. The Software Development Kit uses a collection of cross-platform Web services, libraries, and programming interfaces.

You can choose to automate only a specific task, or you can program the entire process from modeling through to reporting, scheduling, and distribution.

The Software Development Kit is available as a separate package.

For more information, see the IBM Cognos Software Development Kit Developer Guide and IBM Cognos Software Development Kit Getting Started Guide.
Integrating with Other IBM Cognos Products

IBM® Cognos® Business Intelligence is fully integrated with other IBM Cognos products so your business intelligence capabilities can grow with your needs.

When you integrate IBM Cognos Series 7 with IBM Cognos BI, you can

- access Series 7 reports from IBM Cognos Connection
- access IBM Cognos PowerCubes built with IBM Cognos PowerPlay® Transformer 7
- upgrade Series 7 PowerCubes to IBM Cognos BI

When you integrate IBM Cognos Planning products with IBM Cognos BI, you can

- access IBM Cognos Planning Contributor from IBM Cognos Connection
- create queries, analyses, and reports based on IBM Cognos Planning and IBM Cognos Finance data

For more information, see the IBM Cognos Planning Contributor Administration Guide.

Building IBM Cognos Business Intelligence Applications

The lifetime of an IBM® Cognos® Business Intelligence application can be months, or even years. During that time, data may change and new requirements appear. As the underlying data changes, authors must modify existing content and develop new content. Administrators must also update models and data sources over time. For more information about using data sources, see the IBM Cognos Administration and Security Guide and the IBM Cognos Framework Manager User Guide.

In a working application, the technical and security infrastructure and the portal are in place, as well as processes for change management, data control, and so on. For information about the workflow associated with creating IBM Cognos BI content, see the IBM Cognos Architecture and Deployment Guide. For additional information, see the IBM Cognos Solutions Implementation Methodology toolkit, which includes implementation roadmaps and supporting documents. Information about the toolkit is available on www.ibm.com.

The following graphic provides an overview for how to use IBM Cognos BI to build applications across all of your IBM Cognos BI components.

- Locate and prepare data sources and models

IBM Cognos BI can report from a wide variety of data sources, both relational and dimensional. Database connections are created in the Web administration interface, and are used for modeling, for authoring, and for running the application.
To use data for authoring and viewing, the business intelligence studios need a subset of a model of the metadata (called a package). The metadata may need extensive modeling in Framework Manager.

- **Build and publish the content**

  Reports, scorecards, analysis, dashboards and more are created in the business intelligence studios of IBM Cognos BI. Which studio you use depends on the content, lifespan, and audience of the report, and whether the data is modeled dimensionally or relationally. For example, self-service reporting and analysis are done through IBM Cognos Business Insight Advanced, IBM Cognos Query Studio, and IBM Cognos Analysis Studio, and scheduled reports are created in IBM Cognos Report Studio. Report Studio reports and scorecards are usually prepared for a wider audience, published to IBM Cognos Connection or another portal, and scheduled there for bursting, distribution, and so on. You can also use Report Studio to prepare templates for self-service reporting.

- **Deliver and view the information**

  You deliver content from the IBM Cognos portal or other supported portals, and view information that has been saved to portals, or delivered by other mechanisms. You can also run reports, analyses, scorecards, and more from within the business intelligence studio in which they were created.

Chapter 2: IBM Cognos Business Intelligence Examples

The following examples show the different functionality of the various IBM® Cognos® Business Intelligence components:

- run a report in IBM Cognos Connection (p. 19)
- schedule a report in IBM Cognos Connection (p. 22)
- create a portal page in IBM Cognos Connection (p. 24)
- create a query in IBM Cognos Query Studio (p. 27)
- create a statement-style report in IBM Cognos Report Studio (p. 32)
- create a report in Report Studio (p. 36)
- manage an event in IBM Cognos Event Studio (p. 40)
- monitor the performance of your business in IBM Cognos Metric Studio (p. 44)
- analyze items in your business data in IBM Cognos Analysis Studio (p. 49)
- work with IBM Cognos content in Microsoft® Excel spreadsheet software using IBM Cognos for Microsoft Office (p. 53)

Complete these examples in any order. For example, you can start with the Analysis Studio example without doing the previous examples.

Before you experiment with a data source of your own, we recommend that you try these examples using the sample data.

IBM Cognos Samples

Before you can work through these examples, ensure that all the IBM Cognos samples are set up. They show a good cross-section of reports that you can create using IBM Cognos BI.

For more information, contact your administrator or see the IBM Cognos Administration and Security Guide.

The sample databases shipped with IBM Cognos BI contain data from the operations of a fictional retail company, the Great Outdoors Company. The Great Outdoors Company sells camping and sports equipment directly in retail stores across the world, and through other manufacturers.

Example - Run a Report

IBM® Cognos® Connection is the Web portal that gives you access to all the IBM Cognos Business Intelligence functionality. In the portal, you can run reports.

In this exercise, you will learn how to
• navigate the portal
• run a report
• navigate within a report
• drill through from one report to another
• view the report in a different format

You are a business analyst for the Great Outdoors Company. You are asked to study the percentage of returned products. Returned items reveal important information about the quality of products, especially products that are returned because they are defective or are missing parts.

You will drill down to more detailed information in the pie chart, drill back up to the beginning, then drill through to another report using the data shown in your current report as a filter.

**Things to Notice**

The icon for a report shows the default format and default action of the report.

Reports that have saved outputs have an additional icon in the **Actions** column.

At any time, you can click the arrow next to the help button, and click **Go to the Welcome Page** to return to the **IBM Cognos Welcome** page.

**Steps**

1. Open IBM Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:
     http://servername/cognos

2. In the **IBM Cognos Welcome** page, click **IBM Cognos content**, click the **GO Data Warehouse (analysis)** package, and then click **Query Studio Report Samples**.

3. Locate the **Return Quantity by Product Line Chart** report.

   **Tip:** The icon beside an entry identifies its default action. The default action for this report is to open it in IBM Cognos Query Studio. Instead, you want to run the report in HTML format in the viewer.

4. In the **Actions** column, click the run with options button, select the defaults, and then click **Run**.

   The report runs and opens with the latest data about product returns.
You notice that **Outdoor Protection** products have the highest number of returns. You want to drill down to obtain more detailed information.

5. Click the **Outdoor Protection** slice in the pie chart to drill down to more detailed information.  
   **Tip:** You can also drill down by right-clicking or by clicking the legend label.  

At a quick glance, you notice that insect repellents have the highest number of returns.

6. Drill down on **Insect Repellents**.  
   You notice that the **BugShield Lotion** has the highest number of returns. You want to drill up to go back to where you started in this report.

7. Drill up twice to return to the high-level product returns data:  
   • Right-click any area on the pie chart and click **Drill Up**, then repeat this step to drill up again.

**Try on Your Own**

Use IBM Cognos Connection to try the following report features:  

• On the toolbar, click the home or return button to return to the portal.

• Change the report format to PDF.  
  **Tip:** In the **Actions** menu, click the run with options button. From the **Format** list, select **PDF**, and click **Run**.

• Change the report to a different language. To do so, change the language settings in IBM Cognos Connection or in your Web browser, and then run the report again. Because the sample data is multilingual, all data will be translated.
Tip: Next to the my area button, click the down arrow, and click My Preferences. Under Regional options, change the Product language and the Content language. To see the content language changes, you must run the report.

**For More Information**
For more information about running reports, see the online help in IBM Cognos Connection.

**Example - Schedule a Report**
You can schedule entries that are stored in IBM® Cognos® Connection, such as reports, queries, and agents, so that they run at a time that is convenient for you.

In this exercise, you will learn how to
- save a report as a report view
- schedule a report so it runs daily
- use the schedule management tool to view the status of the schedule

You are a business analyst for the Great Outdoors Company. You want to schedule the Return Quantity by Product Line Chart report because some people in your organization need the data updated daily. You schedule the report to run daily, and then check that it is properly scheduled.

**Things to Notice**
When a report runs according to a schedule, the report output is saved, and appears in the Action column in IBM Cognos Connection.

At any time, you can click the arrow next to the help button, and click Go to the Welcome Page to return to the IBM Cognos Welcome page.

**Steps**
1. Open IBM Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:
     http://servername/cognos

2. In the IBM Cognos Welcome page, click IBM Cognos content, click the GO Data Warehouse (analysis) package, and then click Query Studio Report Samples.
   Locate the Return Quantity by Product Line Chart report. You can also use any one of the IBM Cognos sample reports.

3. Create a report view for a daily view of the report:
   - In the Actions column, click the create a report view button next to the report.
• In the Name box, remove the words Report View of from the beginning of the name, type (daily) at the end of the name, and then click Finish.

A new entry appears in IBM Cognos Connection, with the report view icon.

4. Schedule the report view to run daily:
   • For the entry, in the Actions column, click the schedule button.
   • Under Frequency, click the By Day tab.
   • Accept the default time and other defaults.
   • Click OK.

5. Check the schedule:
   • Next to the my area icon, click the down arrow, and click My Activities and Schedules.
   • Click Schedules.
   • In the Filter pane, select Any status and Any priority, and click Apply.

If you are accepting the default settings, you will not see any changes in the schedule.

Your report view appears in the list of scheduled reports.

Try on Your Own
Use IBM Cognos Connection to try the following report features:

• Modify the schedule so that the report runs weekly.
   Tip: In the Actions tab, click More, and then click Modify the schedule.

• Permanently remove the schedule.
   Tip: In the Actions tab, click More, and then click Remove the schedule.

For More Information
For more information about scheduling reports, see the online help in IBM Cognos Connection.
Example - Create a Portal Page

You can customize the portal, IBM® Cognos® Connection, by creating your own portal pages. You can choose the information that is most important to you and make it available from your page. Choose from different types of content and organize the pages in a way that works for you.

This exercise shows how to
● create a page
● add content to a page
● define the appearance of a page
● enhance the content of a page

You want to create a personal page that includes all of the reports and content that you worked on in the previous exercises so that you can easily view the content each time you log on to IBM Cognos Business Intelligence.

Things to Notice

In a portal page, you can add IBM Cognos content (such as business intelligence reports), utilities (such as URLs and bookmarks), and third-party portlets.

You can make a portal page available to a group in your organization, such as to the sales team, or you can create a portal page for your personal use.

Steps
1. Open IBM Cognos Connection:
   ● Start your Web browser.
   ● In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:

   http://servername/cognos

2. In the IBM Cognos Welcome page, click IBM Cognos content.
   Click the new page button.

3. Type the name My Great Outdoors page, click Select My Folders as the location for the new page, and click Next.

4. Specify the page layout:
   ● Under Number of columns, select 2 columns.
   ● Change the width of the left column to 40% and the right column to 60%.

5. Add content to your page:
   ● Under the left column, click Add.
   ● Click IBM Cognos Content.
Select the IBM Cognos Navigator, IBM Cognos Search, and IBM Cognos Viewer portlets, and click the arrow to move them to the Selected entries box.

**Tip:** You can preview the content of the portlets by clicking the view this portlet button in the Actions column.

- Click OK.
- In the left column, click IBM Cognos Viewer and click the right arrow.

6. Define the appearance of the page:

- In the Title box, type My Great Outdoors page.
  
  **Tip:** You can change the formatting of the text.

- Click Next.
- Select the Add this page to the portal tabs check box.
- Click Finish.

The My Great Outdoors page that you created appears as a tab in IBM Cognos Connection.

7. Enhance the content of your page:

- Click the My Great Outdoors page tab.
- In the IBM Cognos Viewer portlet, click the edit button.
- Under Entry, click Select an entry, and select the Return Quantity by Product Line Chart sample report.
Tip: You can find this report in Public Folders > GO Data Warehouse (analysis) > Query Studio Report Samples. You can also use any other sample report.

- Under Portlet height in pixels, type 600.
- Click OK.

The report now appears in the right column of your portal page.

If the report was not previously run and saved, click the run button in the IBM Cognos Viewer portlet. In the Run with options page, click Save the report and then click Run.

Try on Your Own

- Set the My Great Outdoors page as your home page:
  Tip: Next to the home icon, click the down arrow, and click Set View as Home.

- Delete the page:
  Tip: From the tab menu button, on the left side of the tab bar, click Remove this tab.

For More Information

For information about creating portal pages, see the IBM Cognos Connection online help.
Example - Create a Query

Use IBM® Cognos® Query Studio to retrieve information from a relational data source when you want to create reports that answer simple business questions. Also use Query Studio to publish reports for audiences who do not require complex layout or formatting.

In this exercise, you will learn how to

- add columns
- add calculations
- add conditional formatting
- apply a template to the report
- save the report

You are a business analyst for the Great Outdoors Company. You want to create a report that shows which products have the highest rate of return and how much revenue was lost from product returns.

To perform this exercise, you must have the appropriate licensing and security permissions.

Things to Notice

Data that you can add to the report has a different icon depending on the data type.

The reports that you create in Query Studio can be viewed and edited in IBM Cognos Report Studio.

Steps

1. Open IBM Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:
     http://servername/cognos

2. In the IBM Cognos Welcome page, click Query my data, and select the GO Data Warehouse (query) package.
   A blank report appears.

3. Add columns to the report:
   - From the Menu, click Insert Data.
   - Expand Sales and Marketing (query), expand Sales (query), Products, and drag Product type and Product to the work area.
     The work area is the area within a studio that contains the report, analysis, query, or agent that you are currently using.
   - From Sales (query), expand Sales fact, and drag Quantity and Unit cost to the work area.
     The item Unit cost will not appear in the final report, but you need it to build a calculation.
4. Create a calculation to show the lost revenue (Return quantity * Unit cost = Lost revenue):
   - Select the column headings that you want for the calculation. In the work area, click the heading for Return quantity and Ctrl+click the heading for the Unit cost column.
   - Click the calculate button.
   - In the Operation box, select * (multiplication).
   - In the New item name box, type Lost revenue.
   - Click Insert.
   - Delete the Unit cost column.

5. Format the calculated column that you added:
   - Right-click the heading for the Lost revenue column and click Format Data.
   - In the Category list, click Currency.
   - In the Thousands separator list, click Yes, and then click OK.

6. Create a calculation to show the percentage of returns (Return quantity / Quantity)*100):
   - In the work area, click the heading for the Return quantity column, and Ctrl+click the heading for the Quantity column.
   - Click the calculate button.
   - In the Operation type box, select Percentage.
   - The content of the Operation box changes to %.
   - In the New item name box, type % Returned.
   - Click Insert.

7. Sort the % Returned column in descending order:
   - Right-click the heading for the % Returned column, and click the sort button.
   - Under Sort order, click Descending (9 to 1), and then click OK.

8. Apply conditional formatting to highlight products with a lost revenue greater than $200,000:
   - Click the heading for the Lost revenue column.
From the Menu, click Change Layout, and click Define Conditional Styles.

In the New value: box, type 200000, and click Insert.

For the first range, in the Style column, select Poor, and click OK.

The cells with a lost revenue greater than $200,000 appear with a red background.

9. Apply a template to the report:
   - From the Menu, click Change Layout, and click Apply Template.
   - Select Apply a template, and click Select a template.
   - In Public Folders, click Sample Template, select Great Outdoors Template, and click OK twice.

   The report appears with the styles from the template.

10. Add a title to the report:
    - Above the report, click the report title.
    - In the Title box, type Returns by Product Type, and click OK.

11. Save the report:
    - From the toolbar, click the save button.
    - In the Name box, type Returns by Product Type.
    - Accept the default save location, and click OK.

   The final report looks like this:
Notice that the Star Gazer 2 tent has the highest lost revenue rate.

Try on Your Own

- Every time you modify a report, Query Studio updates the results by running a query. Use the run options to preview the report with no data. From the Run Report menu, click Preview with No Data.

  Tip: To preview a report with limited data, you must define design filters in the model.

- Review the definition of all report items in the report. From the Manage File menu, click Report Definition. This is useful for troubleshooting a report.

For More Information

For information about using Query Studio, see the Query Studio online help.

Example - Work with a Dashboard

Use IBM® Cognos® Business Insight to build sophisticated interactive dashboards that facilitate collaborative decision making. You can open dashboard widgets in IBM Cognos Business Insight Advanced to edit them.

In this exercise, you will open a Business Insight dashboard widget in Business Insight Advanced to make changes and then view your changes in Business Insight.

You are a report author in the Great Outdoors Company. You wish to create a dashboard showing employee training by organization level. You have a report widget that shows some of the information you need, so you decide to customize this widget and create a dashboard for future reference.

To perform this exercise, you must have the appropriate licensing and security permissions for this functionality.

Steps

1. Open IBM Cognos Connection:
   - Start your Web browser.
• In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:
  http://servername/cognos

2. In the **IBM Cognos Welcome** page, click **Create my dashboards**.

3. Click **Create New**.

4. In the Insertable Objects pane, expand **Public Folders > Samples > Models > Go Data Warehouse (analysis) > Business Insight Source Reports**.

5. Drag **Employee Training Cost** to the dashboard.

6. Click the report actions button  for the **Employee Training** widget, and then click **Do More...**
   The report widget opens in IBM Cognos Business Insight Advanced.

7. Click the chart body.

8. Delete **Course cost** in the **Default measure (y-axis)** drop zone.

9. Expand **HR (analysis)**, **Employee training**, and **Employee training fact**, and drag **Course cost** to replace **Employee expense type** in the **Series (primary axis)** drop zone.

10. In **HR (analysis)**, **Employee training**, expand **Organization**, **Organization**, and drag **Organization name (level 1)** to replace **Organization (level 1)** in the **Categories (x-axis)** drop zone.

11. Click **Done** to return to the Business Insight dashboard.
   Note your changes to the Employee Training widget.

12. Click the report actions button  for **Business Insight**, and then click **Save as**.

13. Click **My Folders**, and type **My Employee Training** in the **Name** text box, and then click **Save**.

The final report looks like this:
Example - Create a Statement-Style Report

Use IBM® Cognos® Business Insight Advanced for financial report authoring, such as creating and maintaining statement-style reports. Financial authoring in Business Insight Advanced requires many but not all of the features that already exist in IBM Cognos Report Studio, combined with a more intuitive user experience, and interaction with live data.

The user interactions in Business Insight Advanced simplify the process of creating statement-style reports. A template featuring an appropriate starting point for financial report creation is included with the product.

In this exercise, you will learn how to create a statement-style report.

You are a report author in the finance department of the Great Outdoors Company. You create a balance sheet that shows the assets, liabilities, and equity for the company over the last few years. To perform this exercise, you must have the appropriate licensing and security permissions for this functionality.
Things to Notice
When you use Business Insight Advanced, data is live. You do not have to run a report to see the data. From the View menu, you can switch between the Page Design and Page Preview views to see the live data and the design of your report.

Steps
1. Open IBM Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:
     http://servername/cognos

2. In the IBM Cognos Welcome page, click Author business reports.
3. Click the GO Data Warehouse (analysis) package.
4. Click Create new, click Financial, and click OK.
5. Insert data in the crosstab zones:
   - In the Insertable Objects pane, expand Finance (analysis), Finance, Account, and Balance sheet (total).
   - From Balance sheet (total), drag Assets (total) to the Rows zone.
   - From Balance sheet (total), expand Liabilities & equities (total), and drag both Liabilities (total) and Equity (total) to the Rows zone, under the Assets (total).
     Tip: When you drag an object to the crosstab, you will see a flashing horizontal or vertical bar. This indication tells you where the item will be placed in the crosstab.
   - In the Insertable Objects pane, expand Submission, and drag 2006 Actual results in USD to the Columns zone.
   - Drag 2005 Actual results in USD to the Columns zone, to the right of 2006 Actual results in USD.
   - In the Insertable Objects pane, expand Time dimension, 2006, and Q4 2006, and drag December 2006 to the Columns zone, under the 2006 Actual results in USD.
   - Expand 2005 and Q4, and drag December 2005 to the Columns zone, under the 2005 Actual results in USD.
   - From Finance (analysis), expand Finance fact, and drag Amount (year to date) to the Measures zone.
6. Expand the rows to view the company’s breakdown of assets, liabilities, and equity:

- In the report, right-click **Assets (total)** and click **Expand Member** to examine the members of the company’s assets.

- Repeat for **Liabilities (total)** and **Equities (total)**.

7. Change the title of the report to reflect the contents of the balance sheet:

- Double-click the heading title, type **Great Outdoors Company**, and click **OK**.

- On the **Toolbox** tab, drag the **Block** object to the right of the **Great Outdoors Company** title. Repeat the steps to add a second block underneath the first.

- On the **Toolbox** tab, drag the **Text Item** object inside the first block object. When the **Text** dialog box appears, type **balance sheet as at Dec 31, 2006**, and click **OK**.

- Repeat the steps in the previous bullet to add a second text item object to the second block object. In the **Text** dialog box, type **(with prior year comparative data)**, and click **OK**.

- Ctrl+click both block objects, and, using the toolbar, change the font to size **10 pt** and center the text.

8. Change the currency format of the balance sheet:

- In your report, under the **2005 Actual results in USD**, under **December**, use Shift+click to select the whole column.

- Right-click the selection, click **Style**, and click **Data Format**.

- In the **Format type** list, select **Currency**.

- In the **Properties** pane, click the **Currency** property, and select **$(USD) - United States of America**.

- Click the **No. of Decimal Places** property, and then select **0**.

- Click **OK**.
9. Use the pick up style button to repeat the previous step for the column under 2006:
   - To copy all the formatting applied to the item, click the pick up style button, click the items that you want to format, and then click the apply style button.
   - To copy only one of the formatting styles, click the down arrow to the right of the pick up style button and click the style that you want to copy. Then, click the item that you want to format and click the apply style button.
   - If you want to make changes to a style that you copied, click the down arrow to the right of the pick up style button and click Edit Dropper Style. In the Style dialog box, specify basic and advanced style characteristics, and then click OK.

10. Change text formatting to reflect a standard balance sheet:
    - Right-click Amount (year to date) and click Edit Data Item Label. In the Data item label text box, type Year to date (USD $000's), and click OK.
    - Select Year to date (USD $000's) and, using the toolbar, change the text to bold.

11. From the Run menu, click Run Report - HTML.
For More Information
For information about using Business Insight Advanced, see the Business Insight Advanced User Guide.

Example - Create a Report

Use IBM® Cognos® Report Studio to create reports with complex layout, formatting, and report user interactions. Professional report authors generally create such reports, as they have a good knowledge of the data and tools.

In this exercise, you will learn how to

• create a chart

• make the report interactive with prompts

You are a business analyst for the Great Outdoors Company. You create a chart report in Report Studio to show the performance of returns over the last few years. You make the report interactive by adding a prompt.

You will create a report that looks like the Report Studio sample Returns by Order Method - Prompted Chart in the GO Data Warehouse (analysis) sample package.

To perform this exercise, you must have the appropriate licensing and security permissions for this functionality.

Things to Notice
When you use Report Studio, data is not live. You must run the report to view data.

You can view the XML report specification.
You can add multilingual capabilities.

**Steps**

1. Open IBM Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:
     http://servername/cognos

2. In the IBM Cognos Welcome page, click Author advanced reports to open Report Studio.

3. Click the GO Data Warehouse (analysis) package.

4. Click Create a new report or template, click Crosstab, and click OK.

5. Insert data in the crosstab zones:
   - In the Insertable Objects pane, expand Sales and Marketing (analysis), Returned items, Return reason and Return reason.
   - Drag Reason description to the Columns zone.
   - In the Insertable Objects pane, expand Returned items.
   - Drag Return quantity to the Measures zone.
   - In the Insertable Objects pane, expand Inventory, Product, and Product.
   - Drag Product line to the Rows zone.

6. Click the run report button to run your report and verify the content.

   The report output appears in IBM Cognos Viewer.

   **Tip:** To return to Report Studio, close the IBM Cognos Viewer Web browser.

   ![Return quantity table]

7. Insert another column in the report:
   - In the Insertable Objects pane, expand Sales, Time dimension, and Time dimension.
   - Drag Year to the column after the Reason description column.

8. Insert a chart in the report:
   - In the Insertable Objects pane, click the Toolbox tab.
9. Create a filter to exclude the **Wrong product ordered** return reason from the crosstab:

   - In the crosstab, click the **Reason description** column heading.
   - On the toolbar, click the filter button.
   - Click **Create Custom Filter**.
   - Under **Condition**, select **Do NOT show the following values**.
   - Under **Values**, select **Wrong product ordered** and move it to the Selected values list.
   - Click **OK**.

10. Create a prompt page for the order method to allow users to filter data in the report and retrieve data only for the order method they select:

    - Click the background of the work area to clear.
11. Move the cursor over the Page Explorer between the Insertable Objects pane and the work area, and in Report Pages, click Page1 to return to the report page.

Tip: Click the Prompt Pages folder title to remove or rename a page, or to edit properties.

12. Add a title to the report:
   - Double-click the Double click to edit text area, type Returns by Order Method, and click OK.

13. Save the report:

   - From the Tools menu, click Build Prompt Page.
   - Use Ctrl+click to select the Back and Next buttons, and the Double click to edit text prompt page title (that are automatically created) and delete them.
   - In the Insertable Objects pane, click the Toolbox tab.
   - Drag the Value Prompt object into the prompt page.

The Prompt Wizard - Value Prompt dialog box appears.

   - Click Next.
   - Beside the Package item box, click the ellipsis (...) button.
   - In the Choose Package Item dialog box, expand Sales and Marketing (analysis), Sales, and Order method.
   - Click the Order method dimension, and then click OK.
   - Click Next to accept the defaults, and click Finish.
● From the File menu, click Save As.

● Name the report Returns by Order Method - Prompted Chart and click Save.

14. Run your report and verify the content:

● Click the run report button.

● In the Order method drop down list, click E-mail and then click Finish.

The report output appears in IBM Cognos Viewer.

<table>
<thead>
<tr>
<th>Return quantity</th>
<th>Defective product</th>
<th>Incomplete product</th>
<th>Wrong product shipped</th>
<th>Unsatisfactory product</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Camping Equipment</td>
<td>1,028</td>
<td>1,714</td>
<td>2,595</td>
<td>3,360</td>
<td>4,312</td>
<td>2,402</td>
<td>387</td>
<td>1,596</td>
</tr>
<tr>
<td>Mountaineering Equipment</td>
<td>65</td>
<td>159</td>
<td>1,244</td>
<td>72</td>
<td>85</td>
<td>1,403</td>
<td>72</td>
<td></td>
</tr>
<tr>
<td>Personal Accessories</td>
<td>1,502</td>
<td>687</td>
<td>1,642</td>
<td>867</td>
<td>2,547</td>
<td>1,643</td>
<td>285</td>
<td>223</td>
</tr>
<tr>
<td>Outdoor Protection</td>
<td>9,528</td>
<td>200</td>
<td>127</td>
<td>22,111</td>
<td>10,026</td>
<td>10,513</td>
<td>161</td>
<td>376</td>
</tr>
<tr>
<td>Golf Equipment</td>
<td>456</td>
<td>1,219</td>
<td>393</td>
<td>621</td>
<td>2,084</td>
<td>615</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Try on Your Own

● Save the report as a template so you can create a new report with the same layout and include different data.

   Tip: From the File menu, click Convert to Template and then save the report with a new name.

● Change the chart background color.

   Tip: In the work area, click the chart. In the Properties pane, expand Color & Background, click Background Color, and click the ellipsis (…) button next to Background Color.

● View the XML specification for the report.

   Tip: From the Tools menu, click Show Specification.

For More Information

For information about using Report Studio, see the Report Studio User Guide.

Example - Manage an Event

Use IBM® Cognos® Event Studio to define business events or exceptional conditions in your data that require attention. Create agents to monitor your data and notify decision-makers in your
organization of events as they happen, so that they can make timely and effective decisions. You create agents to perform tasks or deliver alerts when the data meets predefined thresholds.

This exercise shows how to

- define business events
- define agent tasks
- review the status of events

You are a business analyst for the Great Outdoors Company. You want to ensure that your customers are satisfied with the products and services that you provide. In particular, if products are returned, you want to investigate why, and ensure that you offer a replacement before your customers decide to shop elsewhere.

Event Studio can notify you when a customer returns a product because it was defective, unsatisfactory, incomplete, or because the wrong product was shipped to them. You want to immediately send an email to your customer service department with details about the order and the customer, so that they can contact the customer.

You will create an agent that looks like the Event Studio sample Returns Agent in the GO Sales (query) sample package.

To perform this exercise, you must have the appropriate licensing and security permissions.

**Things to Notice**

The tasks that you need to perform to create an agent in Event Studio appear in the I want to... area in the left pane. By default, when you open Event Studio, you start with the first task, defining an event.

**Steps**

1. Open IBM Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:
     http://servername/cognos

2. In the IBM Cognos Welcome page, click Manage my events, and select the GO Sales (query) package.

3. Create the expression that defines the event:
   - In the Insertable Objects pane, expand Returned items (query) and Returned items.
   - In the Insertable Objects pane, expand Return reason.
   - Use both Return quantity and Reason description to create the following expression:
     \([\text{Return quantity}] > 0 \text{ AND } \text{[Reason description]} \in \{\text{Wrong product shipped'},\text{’Unsatisfactory product’},\text{’Incomplete product’},\text{’Defective product’}\}\)
Tip: Insert items from the **Insertable Objects** pane. To select from a list of possible values for the return reason, click the select values button. Move the values you want from the **Select Value** box to the **Selected Items** box and click **OK**.

- Click the validate button to validate your expression.

  Tip: You can also click **Preview** from the **Actions** menu to see the data retrieved from the data source.

You defined the expression that will notify you whenever a customer returns a product because it was defective, unsatisfactory, incomplete, or because the wrong product was shipped to them.

4. Create an email task to immediately send an email to your customer service department with details about the returned order and the customer so that they can contact the customer:

- In the **I want to** list, click **Add a task** and click **Send an email**.

- In the **To** box, type the email address for the customer service department.

  Tip: Since this example is for learning purposes, the agent will not actually run. Therefore, you can type any email address.

- In the **Subject**, type **Products Returned**.

- Above the **Body** box, click the insert table button and add four columns and two rows.

- Add information about returned products to the table as follows:

  Manually type in the text for the heading row of the table. As you add text to the table, delete the **insert text...** text from each cell.

  Drag objects from the **Insertable Objects** pane to the bottom row of the table.

  Tip: From the **Insertable Objects** pane, expand **Returned items (query)**. Expand **Order** to find **Order number**; **Product** for **Product name**; **Returned items** for **Return quantity**, and **Retailer site** for **Company name**.

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Product Name</th>
<th>Quantity</th>
<th>Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Order number]</td>
<td>[Product name]</td>
<td>[Return quantity]</td>
<td>[Company name]</td>
</tr>
</tbody>
</table>

When the agent runs, the data item for each event is replaced by the current value in the package.

- Select the heading row and then click **bold** to make the column headings more prominent.
5. Set the execution rules so that a notification is sent for new events only:
   - In the I want to list, click Manage the task execution rules.
   - Click the Event Key tab.
   - In the Insertable Objects pane, click the Source tab.
   - Expand Sales (query), Order, and drag Order number to the Event key box.
   - Click the Event Selection tab.
   - Under Select when to perform this task, ensure that only the New events check box is selected.
   - Click OK.

6. Set the schedule for when you want the event to run:
   - In the I want to list, click Schedule the agent.
   - In the Set the schedule pane, under Frequency, click the By Day tab, and select Every 1 hour(s).
   - Click OK.

7. Save the agent as Returns Agent.

Each hour, the agent runs and the next time a customer returns a product, an email is sent to the customer service department with information about the order.

**Try on Your Own**
- Attach the event list to the email. An event list shows the events that the agent processed. In this example, the event that we defined is when a customer returns a product.
Tip: In the summary area, click the Products Returned email task. Below the Body box, click Attach, and then click Attach the event output.

For More Information
For information about creating agents, see the Event Studio online help.

Example - Monitor Performance
With IBM® Cognos® Metric Studio, you can track the performance of your organization against its goals and objectives. At a quick glance, decision makers at every level of the organization can see the current status of the organization, and then react or plan.

A metric is an indicator of key measures that compares actual results to targets. A metric also records who is responsible for the results and the impact of the metric. A scorecard is a collection of performance metrics and projects that reflects the strategic goals of a unit in an organization.

This exercise shows how to

• review a strategy map for a visual representation of the strategy and the objectives of that strategy for an organization

• review and understand the performance of a metric on a scorecard

• create an action on a metric

• add a metric to your watch list

You are a sales manager for a region for the Great Outdoors Company. You regularly look at a scorecard that contains metrics about your sales area. The metrics give you an instant idea of how the current sales compare to the sales targets set by the company. Return quantity is one of the metrics.

To perform this exercise, you must have the appropriate licensing and security permissions for this functionality.

Things to Notice
Metrics appear as either Poor (red), Average (yellow), or Excellent (green).

For each metric, you can see whether the trend is improving, staying the same, or getting worse.

When you move your pointer over the title of a metric, you see a history chart that shows the performance of the metric. A flyout menu extends when you pause your pointer over a metric or a diagram.

Steps
1. Open IBM Cognos Connection:
   • Start your Web browser.
   • In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:
     - http://servername/cognos
2. In the **IBM Cognos Welcome** page, click **Manage my metrics**, and select the **GO Metrics** package.

3. View the strategy map:
   - On the left pane, click the **Scorecards** tab, and click the **GO Consolidated** scorecard.
   - On the right pane, click the **Diagrams** tab.

In the **GO Strategy map**, notice how you can quickly evaluate the performance of each of the goals of the organization. The large indicators show the status for a specific strategy. The smaller indicators that appear below a strategy show the trend. The values for metrics that are not performing well appear in red. Status and trend indicators that appear in red indicate possible problem areas.

For example, in the **Production & Distribution** function of the strategy map, in the **Control product quality** metric, the value for **Return quantity %** is red, which shows a poor performance metric.

4. Explore the scorecard:
   - Click the **Scorecards** tab.
   - On the left pane, on the **Scorecards** tab, expand the **GO Consolidated** scorecard.

   You see that the Great Outdoors Company has scorecards for each of the four functions of the company: Finance, Sales and Marketing, Production and Distribution, and Human Resource.
Expand the Production and Distribution scorecard, and click Asia Pacific.

Click the Metrics tab.

All the metrics associated with the Asia Pacific region are shown. Notice that the Asia Pacific Return by reason % Wrong product ordered metric is red. You may want to explore this metric further to see what might be causing this trend.

Click the Asia Pacific-Return quantity % and click the Diagrams tab.

Expand the metrics in the diagram by clicking the arrow to the left of the Asia Pacific-Return by reason %-Failed Orders metric.

You can see what data is in the Return quantity % metric. You can also see which return reason has a critical issue.

Pause your pointer over Asia Pacific-Return quantity % to see more information about that metric.
In the left pane, in the Production and Distribution scorecard, click Asia Pacific, and then click the Metrics tab to view the metric related to return quantity. Notice that the status of Asia Pacific-Return by reason %-Wrong product ordered metric is poor.

On the right pane, on the History tab, click List. The information on the History tab answers the question "When?". You see the actual and target values for the metric data for previous periods. You also see quarterly and yearly summaries.

5. Click the Asia Pacific-Return by reason %-Wrong product ordered metric. In Metric Studio, the tabs represent the questions you might ask yourself, as you try to solve a problem or understand a piece of information.

6. On the right pane, on the History tab, click List. The information on the History tab answers the question "When?". You see the actual and target values for the metric data for previous periods. You also see quarterly and yearly summaries.
7. Explore the information available for the Asia Pacific-Return by reason %-Wrong product ordered metric:

- Click the Diagrams tab.

  The information on the Diagrams tab helps you understand the question "How?" by comparing your metric with other metrics. Impact diagrams show the relationships between the Return by reason % metric and other metrics.

- Click the Details tab.

  The information on the Details tab helps you understand your business and the metrics that you are monitoring. On this tab, you see a description of the metric, how the metric is calculated, who owns the metric, and whether a metric is impacted by other metrics.

8. Create an action for one of your business analysts to have her investigate the performance of product returns:

- Click the Actions tab.

- Click the new action button.

  Tip: You need to select a metric to see the action button.

- In the Name box, type Kazumi Uragome, the person who will own the action.

- In the Description box, type Please investigate to let Kazumi know what to do.

- Beside the Planned Finish box, click the calendar icon, select a date one week from today.

  Tip: You may need to scroll down to see the Planned Finish box.

- Click OK.
9. Add the Asia Pacific-Return reason %-Wrong product ordered metric to your watch list so that you can easily monitor it in the future:

- In the left pane, in the Production and Distribution scorecard, click Asia Pacific, and click the Metrics tab.
- Click the Asia Pacific-Return reason %-Wrong product ordered metric.
- On the upper toolbar, click the add to watch list button.
- In the left pane, click My Folders and click Watch List.

The Asia Pacific-Return by reason %-Wrong product ordered metric appears in your watch list.

Try on Your Own

- Add a comment to the metric to communicate information to users of the metric.
  Tip: Beside the metric, in the comment column, click the ellipsis (...) button. After you add a comment, a comment icon appears.

- Add an email notification so that you will be notified when the metric changes.
  Tip: Beside the metric, click the email alerts button. The email alerts button changes to show that email alerts is now turned on. You can also specify when and how often you receive email notification about changes to metrics in the watch list, by changing the email alerts properties.

- Filter the scorecard according to the status of the metrics.
  Tip: On the Metrics tab, in the Filter box, select the status or trend that you want.

For More Information

For more information about using scorecards, see the Metric Studio online help.

Example - Create an Analysis

In IBM® Cognos® Analysis Studio, you can manipulate items in your data interactively so that you can identify and understand the problems and issues in your business.

In this exercise, you will learn how to

- drill down
- create a top filter
- create a summary calculation
• create a crosstab and a chart

You are a business analyst for the Great Outdoors Company. You want to further analyze the returns business items to find out where and why products are the most frequently returned, and that have the biggest impact on the company’s profit.

To perform this exercise, you must have the appropriate licensing and security permissions.

**Things to Notice**
The items and measures that you can add to your analysis appear in the data tree in the left pane. The overview area above the work area is a convenient place to quickly explore and change the contents of your analysis. You manipulate rows and columns, drill up or down, and provide context for the work area.

Analysis Studio uses sets, which are collections of similar items. You manipulate items by applying actions to sets. You can sort, filter, and nest sets. You can also save custom sets and view subtotals for your sets.

**Steps**
1. Open IBM Cognos Connection:
   - Start your Web browser.
   - In the address bar, type the URL supplied by your administrator, and then press Enter. The URL looks something like this:
     http://servername/cognos
2. In the IBM Cognos Welcome page, click Analyze my business.
3. Click the Sales and Marketing (cube) package.
4. Click Blank Analysis, and click OK.
5. Insert data in the crosstab:
   - In the Insertable Objects pane, expand Measures and drag Returns to the Measure zone or to the upper-left corner of the work area.
   - Drag Products to the Rows zone.
   - Drag all four years to the Columns zone.

You now see the returns for all the product brands over a four year span. The total number of returns is visible in the Total column.

6. Filter the top ten product brands based on their total returns over the last four years:
   - In the overview area, right-click Products and click Down a Level.

The overview area is located above the work area. You can use the overview area as a convenient place to quickly explore and change the contents of the work area. The overview area shows any applied filters and sorting.
Repeat the previous step to see a list of all individual products.

In the overview area, right-click **Products (depth 3)**, select **Top or Bottom**, select **Top**, and then click **10**.

You see that the top ten products with the most returns are now the only products in the crosstab.

Tip: To use a specific product name rather than having to drill down multiple layers, in the **Insertable Objects** pane, navigate to the product that you want. Select the product you want, and in the **Information** pane, drag the level name into the crosstab.

7. Create a summary calculation to see what the average returns are per year for the top ten products:
   - In the overview area, right-click **Time (list)**, select **Summarize**, and then click **Average (Time (list))**.

The **Average (Time (list))** summary is added to the crosstab. This summary shows the average number of returns over the fours years in the crosstab.

8. View your analysis as a chart to see if there is a trend or spike in any of the top ten returns:
   - From the **View** menu, select **Select Chart Type**, select **Line Chart**, and then click **Standard**.

Take note of the top ten products with the highest returns. There may be some products, like BugShield Lotion, that are anomalies. You may want to exclude them from your analysis, or you may decide that you need to be comparing returns to other metrics; such as quantity sold or gross profit.
9. Change the top ten definition to filter on year 2007 to give you the most recent data for product returns.

- In the overview area, right-click **Products (depth 3)**, select **Top or Bottom**, select **Top**, and then click **Custom**.

- In the **Define top or bottom filter** pane, from the **For column** list, select **2007**.

By specifying 2007 in the top definition, you change the filter context to focus on the highest top ten returns for the year 2007. In addition, you see the other years in the crosstab, to give you some additional historical information.

**Tip:** In the definition, you can specify the number of items you want by number, percentage, or sum.

- Click **OK**.

Notice that EverGlow Lamp has the highest number of returns.

**Tip:** In the overview area, using the **Time (list)** column, you can also filter on 2007. The data returned when using this filter will be different than setting the 2007 context in the top definition. Only 2007 data will appear in the crosstab, instead of including the historical data. You can use this type of filter to help you analyze your data to find more information.
10. Save the analysis as **Returns vs Gross Profit over Time**.

**Try on Your Own**

- For report formatting and layout control, edit the report in IBM Cognos Report Studio. With Report Studio, you can extend the report definition to include other reporting elements, or enhance the report by defining bursting rules. To use Report Studio, you must have the appropriate licensing and security permissions.

  **Tip:** From the **File** menu, click **Open in Report Studio**. After you save an analysis in Report Studio, you can no longer edit the analysis in Analysis Studio.

**For More Information**

For information about using Analysis Studio, see the Analysis Studio online help.

**Example - Work with IBM Cognos Content in Microsoft Excel**

You use IBM® Cognos® for Microsoft® Office to access IBM Cognos content in Microsoft Excel spreadsheet software. In Excel, you can work with and add value to existing IBM Cognos reports, apply calculations, and use your existing Microsoft Excel macros. When you reconnect to the IBM
Cognos server, you can refresh the data to obtain the latest information. You can also import content into Microsoft PowerPoint and Microsoft Word.

IBM Cognos security is maintained in your Microsoft Office environment. For example, if you share a Microsoft Excel workbook with coworkers, when they connect to the IBM Cognos server to retrieve or refresh data, their security permissions retrieve the appropriate data.

This exercise shows how to

- import IBM Cognos content into a Microsoft Excel workbook
- refresh data
- publish a workbook to IBM Cognos Connection

You want to import the information from the two IBM Cognos Query Studio sample reports named Return Quantity by Product Line and Return Quantity by Product Line Chart into Microsoft Excel.

To perform this exercise, you must have the appropriate licensing and security permissions. IBM Cognos for Microsoft Office as well as the .NET framework must be installed and configured on your computer.

**Things to Notice**

You use IBM Cognos for Microsoft Office to import IBM Cognos report elements, such as headers, footers, images, lists, and charts in your Microsoft Excel workbook. You can import elements from different reports into the same workbook.

When you save your workbook, you can save it with or without data.

You can publish workbooks to IBM Cognos Connection so that other users can access them.

**Steps**

1. Start Microsoft Excel.
   
   The IBM Cognos for Microsoft Office pane appears on the right side.

2. To begin using IBM Cognos for Microsoft Office, on the toolbar, click the Logon button, select the server that you want to connect to, type your user ID and password, and click OK.

3. Import the sample reports **Return Quantity by Product Line** and **Return Quantity by Product Line Chart** in the workbook:
   
   - In the IBM Cognos for Microsoft Office pane, click the Browse Content tab.
   
   - Expand Public Folders, Samples, Models, GO Data Warehouse (analysis), Query Studio Report Samples, and click Returns Quantity by Product Line.
   
   - Click Import content.
      
      In the Import Content dialog box, you can select the specific report elements that you want to import. You want to keep the default selections.
   
   - Click Finish.
   
   - Repeat the steps for the Return Quantity by Product Line Chart report.
The reports appear in the workbook.

4. Refresh the data in the report:
   - In the IBM Cognos for Microsoft Office pane, click the Manage Data tab.
     In the Imported report elements box, you can see all the elements in your workbook and their properties.
   - Right-click the report and click Refresh Data and Formatting.
     Because the sample database is static, the report contents do not actually change.

5. Publish the workbook to My Folders in IBM Cognos Connection:
   - Save the workbook on your computer.
     Tip: To save the workbook without data, right-click the report and click Remove Data. You can refresh all data later.
   - From the IBM Cognos for Microsoft Office toolbar, click the publish button.
   - In the Publish dialog box, select the IBM Cognos Business Intelligence server where you want to save the report, and click Publish.
The workbook now appears in IBM Cognos Connection. To open a workbook from IBM Cognos Connection, select it and save it locally to your computer.

**For More Information**

For information about working with IBM Cognos content in Microsoft Office, see the IBM Cognos for Microsoft Office online help.
agent
The object type created and edited by Event Studio. An agent contains the event condition and the associated tasks to perform.

authentication
The process of validating the identity of a user or server.

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.

condition
An expression that yields a Boolean value. Conditions are used in query expressions, query filters, and Boolean report variables that can be used for conditional formatting, styles, data sources, layouts, and blocks.

Content Manager
The service that retrieves information from the content store, and saves information to the content store.

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.

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.

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.

In TM1, to access information by starting with a general category and moving through the hierarchy of information. For example, in a database, to move from field to file to record.
**drill up**
To navigate from one level of data to a less detailed level. The levels are set by the structure of the data.

**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.

In Cognos Real-Time Monitoring and Cognos Now!, a row or a series of rows of data.

**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.

**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.

**layout**
The arrangement of printed matter on a screen or page, including margins, line spacing, type specification, header and footer information, indents, and more.

**metric**
A measure to assess performance in a key area of a business.

**model**
In Data Manager, a system, consisting of fact data and metadata, that represents the aspects of a business.

**namespace**
For authentication and access control, a configured instance of an authentication provider that allows access to user and group information. In Framework Manager, namespaces uniquely identify query items, query subjects, and so on. You import different databases into separate namespaces to avoid duplicate names.

In XML and XQuery, a uniform resource identifier (URI) that provides a unique name to associate with the element, attribute, and type definitions in an XML schema or with the names of elements, attributes, types, functions, and errors in XQuery expressions.

**package**
A subset of a model, which can be the whole model, to be made available to the Cognos server.

**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.
**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.

In Cognos Planning, to copy the data from Contributor or Analyst to a data store, typically so that the data can be used for reporting purposes.

**query**
A request for information from a data source based on specific conditions: for example, a request for a list of all customers in a customer table whose balances are greater than $1000.

**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.

**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.

**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.

**set**
A collection of related items or members. Members in a set may be specifically chosen, or selected by one or more filter rules.

**strategy**
The overall plan of action (such as for a brand unit, business unit, channel, or company, etc.) 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.

**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.

**template**
In report authoring, a reusable report layout or style that can be used to set the presentation of a query or report.

In Data Manager, a component that can be used to define reference structure attributes or dimension table columns together with their semantics.

**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.

**work area**
The area within a studio that contains the report, analysis, query, or agent currently being used.
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