IBM Cognos Connection
Version 10.1.1

# *User Guide*

IBM

**Note**

Before using this information and the product it supports, read the information in "Notices" on page 187.

## Product Information

This document applies to IBM Cognos Software 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 information is intended for use with IBM® Cognos® software.

This information explains how to use IBM Cognos Connection, the IBM Cognos software portal, to view, edit, schedule, and distribute standard and complex reports.

## Audience

To use this information, you should be familiar with reporting and security concepts, and have experience using a Web browser.

## Finding information

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

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

## 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

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## Accessibility Features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. Because the IBM Cognos Connection component supports a wide range of IBM Cognos components, the availability of accessibility features varies by component within IBM Cognos Connection.

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# Chapter 1. What's New?

This section contains a list of new, changed, and deprecated features for this release. It also contains a cumulative list of similar information for previous releases. It will help you plan your upgrade and application deployment strategies, and the training requirements for your users.

For information about upgrading, see the *IBM Cognos Installation and Configuration Guide* for your product.

For information about other new features for this release, see the *IBM Cognos Business Intelligence New Features Guide*.

For changes to previous versions, see


- "New Features in Version 10.1.0" on page 2
- "New Features in Version 8.4" on page 5
- "New Features in Version 8.3" on page 7


To review an up-to-date list of environments supported by IBM Cognos products, including operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, access one of the IBM Cognos Information Centers at http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp.

## New Features in Version 10.1.1

New features in version 10.1.1

Listed below are new features since the last release. Links to directly-related topics are included.

### Archived report output

IBM Cognos Business Intelligence now provides the ability to archive saved report output to external repositories, such as IBM FileNet® Content Manager. This allows you to adhere to regulatory compliance requirements, and reduces the size of content in the content store. You can view archived content from IBM Cognos Connection and search archived content using indexed search.

For information about viewing archived content, see "Viewing archived report output" on page 91.

For information about searching for archived content, see "Searching for entries using full text and all fields" on page 37.

### Dashboards are now workspaces

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

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### Safari 5 support

This release of IBM Cognos Business Intelligence provides Safari 5 support for IBM Cognos Connection and IBM Cognos Viewer.

## New Features in Version 10.1.0

Listed below are new features since the last release. Links to directly-related topics are included.

### Accessible Report Output

In this release, you can create accessible report output. Accessible reports contain features, such as alternate text, that allow users with disabilities to access report content using assistive technologies, such as screen readers.

For more information about enabling accessible reports in IBM Cognos Connection, see "Enabling Accessible Report Output" on page 88.

### Support for New Scheduling Options

There are several new scheduling options.

They include

- the ability to specify a daily frequency for a schedule, by hour or by minute, and limit the running of scheduled entries to a certain period of the day.
- the ability to change the owner credentials for a schedule.
- the ability to suspend scheduled activities.

### IBM Cognos Business Insight

IBM Cognos Business Insight is a new report consumption environment that provides an integrated Business Intelligence experience for business users. This Web-based tool allows you to use IBM Cognos content and external data sources to build sophisticated, interactive dashboards. For a more detailed description of IBM Cognos Business Insight, see the IBM Cognos Business Intelligence New Features.

IBM Cognos Connection users can launch IBM Cognos Business Insight from within IBM Cognos Connection, however, they must have the appropriate licence. For information about launching IBM Cognos Business Insight in IBM Cognos Connection, see "Launching IBM Cognos Business Insight" on page 185. For information about using IBM Cognos Business Insight, see the IBM Cognos Business Insight *User Guide*.

### My Inbox

In this release, there is a new task inbox that contains the following human tasks: secure approval requests, ad-hoc tasks, and notification requests.

For more information, see Chapter 10, "Managing Human Tasks," on page 149.

### Curly Brackets and Parentheses are Breakable

When you run a report in PDF format, curly brackets {} and parentheses () no longer stay on the same line as the text before them.

For example, **Products(2004)** may now break to a new line between **Products** and **(2004)**.

### IBM Cognos Active Reports

IBM Cognos Report Studio now has an active report output type that provides a highly interactive and easy-to-use managed report.

For more information, see “IBM Cognos Active Reports” on page 72.

### Report Name Used for the Exported Output File Name

When you run a report in an export format such as PDF, delimited text (CSV), Microsoft Excel spreadsheet software (XLS), the IBM Cognos report name is now used as the exported file name. This allows you to save the report output using the same name as the original report.

For more information, see “View, Run, or Open a Report” on page 72.

### Manage Your Own Data Source Credentials

In this release, you can manage your own data source credentials. You can also choose to have your data source credentials remembered so you don’t have to enter them every time.

For more information, see “Manage Your Own Data Source Credentials” on page 50.

### Packages

In this release, you can create packages in IBM Cognos Connection. You can also view the data sources that are used by a package.

For more information, see Chapter 7, “Packages,” on page 111.

## Changed Features in Version 10.1.0

Listed below are changes to features since the last release. Links to directly-related topics are included.

### Enhanced Search Capability

In earlier releases, enhanced search was available by installing IBM Cognos Go! Search as a separate component. Now, enhanced search is the default mode in IBM Cognos Business Intelligence.

For information about searching for an entry, see “Searching for entries using name, description, and name or description” on page 35.

### Watch Rules

You can now use a new watch rule for saved reports that sends alerts depending on a metric-like change in the performance status of a condition (good, average, or poor).

In addition, you can now alert other report users by sending a notification to their task inbox when an event condition is satisfied.

For more information, see “Watch Rules in Saved Reports” on page 94.

## IBM Cognos Report Studio Professional and Express Authoring Modes

In this release, Professional authoring mode is available in Report Studio and Express Authoring mode is available in IBM Cognos Business Insight Advanced. In previous releases, Professional authoring mode and Express authoring mode were available in Report Studio.

## Changes to Portlet and Portlet Group Names

The following is a list of the portlet and portlet group names that have changed in this release of IBM Cognos Business Intelligence.

| Previous Name | Current Name |
|---|---|
| Cognos Content | IBM Cognos Content |
| Cognos Extended Applications | IBM Cognos Extended Applications |
| Cognos Metrics | IBM Cognos Metric Studio |
| Cognos Navigator | IBM Cognos Navigator |
| Cognos Search | IBM Cognos Search |
| Cognos Utility | IBM Cognos Utility |
| Cognos Viewer | IBM Cognos Viewer |
| Metrics Custom Diagram | IBM Cognos Custom Diagram |
| Metric History Chart | IBM Cognos History Chart |
| Metrics Impact Diagram | IBM Cognos Impact Diagram |
| Metric List | IBM Cognos Metric List |

## Change of Name for IBM Metadata Workbench

The name IBM Metadata Workbench has changed to IBM Metadata InfoSphere™ Workbench.

## Line break rules in PDFs have changed

Line break rules for word wrapping in PDFs have changed slightly from the last release. Brackets and parenthesis such as { } and ( ) are now treated as breakable. For example, in past releases, the following string would be treated as a single non-breaking string.

*Boilers(Steam)*

In this release, "Boilers" and "(Steam)" are treated as separate strings which might result in the following when the string occurs at the end of a line.

*Boilers*

*(Steam)*

## Deprecated Features in 10.0.0

A deprecated feature is one that is being replaced by a newer version or a better implementation. The intention is to discontinue the use of the feature and provide recommendations for adapting to this change over multiple releases.

Listed below are deprecated features, including links to related topics.

### Excel 2000 and Excel 2000 Single Sheet Report Outputs

The Microsoft Excel 2000 spreadsheet software and Excel 2000 Single Sheet spreadsheet software report outputs are no longer supported in this release.

## New Features in Version 8.4

Listed below are new features since the last release. Links to directly-related topics are included.

### Additional Language Support

In addition to Japanese, German, and French, the installation documentation and the user interface for the installation program and IBM Cognos Configuration are available in the following languages: Chinese (simplified), Chinese (traditional), Korean, Italian, Spanish, Portuguese (Brazilian).

You can use the new product languages when personalizing your user interface in IBM Cognos 8 "Personalize the Portal" on page 38.

English product documentation is installed when you install the IBM Cognos 8 gateway component. The *IBM Cognos Installation and Configuration Guide*, the *Quick Start Installation and Configuration Guide*, and the *Readme* are the exceptions, and are available in all supported languages. To access all other translated documentation, you must install the Supplementary Languages Documentation.

### Support for IBM Metadata Workbench as a Lineage Solution

You can now configure IBM Metadata Workbench as a lineage solution in IBM Cognos 8.

For more information, see "View Lineage Information for a Data Item" on page 80.

### Access to IBM InfoSphere Business Glossary

If you use the IBM InfoSphere Business Glossary, you can now access the glossary from Cognos Viewer.

For more information, see "Access the IBM InfoSphere Business Glossary" on page 81.

### Managing Comments Using Cognos Viewer

You can now add user-defined comments to saved HTML, PDF, and XML reports using Cognos Viewer.

For more information, see "Comments in Saved Reports" on page 98.

## Viewing Lineage Information

A data item's lineage information traces the item's metadata back through the package and the package's data sources. Viewing lineage information ensures that you add the correct data items to a report.

For more information, see “View Lineage Information for a Data Item” on page 80.

## Hiding Entries

You can hide entries in IBM Cognos Connection and IBM Cognos Administration, such as reports, packages, pages, folders, jobs, data sources, portlets, and so on. This functionality is most often used with drill-through reports.

Hiding an entry does not affect its security policies.

For more information, see “Hide an Entry” on page 30.

## Metric Studio Content in Portal Pages

An IBM Cognos Connection page or a dashboard can now display metric impact diagrams and custom diagrams.

This new content can be added by using the following new portlets:

- Metrics Impact Diagram

  Use to display impact diagrams associated with a metric.
- Metrics Custom Diagram

  Use to display custom diagrams associated with a scorecard.

For more information, see Chapter 5, “Pages and Dashboards,” on page 53.

## Save History Details for Job Steps

You can save history details for job steps when the run activity completes successfully.

For more information, see “Job Properties” on page 24.

## Enhanced Drill-through Capabilities

In earlier versions of IBM Cognos 8, model-based drill-through supported only reports created in Analysis Studio, Query Studio, or Report Studio as targets. Other types of drill-through targets are now supported. For example, you can drill through to PowerPlay® Studio reports saved in the content store, or to a package that contains a PowerCube.

In earlier versions of IBM Cognos 8, drill-through access required the existence of parameters in the target. IBM Cognos 8 now allows dynamic filtering of the data. In cases where more control is needed, you can continue to use the existing parameterized drill-through.

You now also can restrict the availability of package drill-through definitions to measures as well as other data when you set the scope.

If the source is based on a dimensional package, you can choose what property of the source metadata item to map to the target. For example, you can map the

member caption of the source metadata item to a relational value in the target instead of using the business key. For more information, see Chapter 8, “Drill-through Access,” on page 115.

## New Features in Version 8.3

Listed below are new features since the last release. Links to directly-related topics are included.

### My Activities and Schedules

You can now manage IBM Cognos 8 activities from My Activities and Schedules in IBM Cognos Connection.

You can view a list of your activities that are current, past, upcoming on a specific day, or scheduled. You can filter the list so that only the entries that you want appear. A bar chart shows you an overview of activities.

You can set run priority for entries. You can also view the run history for entries, specify how long to keep run histories, and rerun failed entries.

For more information, see Chapter 13, “Activities Management,” on page 173.

### My Watch Items

Use the My Watch Items area of the portal to view and manage alerts for new report versions and rules that you have set for conditional report delivery. The My Watch Items functionality enables end users to monitor and manage business information that is critical to them from a single location.

As a report owner, you must allow report users to receive alerts and create watch rules for the reports. For information about how to enable these features for reports, see “Enable Watch Rules for a Report” on page 94.

### Report Alerts

By enabling an alert on a report, you can now be notified when a new version is available. Whenever a report is run and saved due to a scheduled or manual run, all subscribers receive an email that a new version is available.

Subscriptions are saved to the **Alerts** tab of **My Watch Items** “My Watch Items” on page 41 and can be maintained from that location.

For more information, see “Adding or Removing Yourself from the Alert List for a Report” on page 93

### Watch Rules

A new watch rule action is available in Cognos Viewer. You can use watch rules to control when users are notified about the availability of new report versions. When a report is run and saved, a user-defined threshold condition is checked. If this condition satisfies a user's criteria, the report can be e-mailed.

To create a watch rule “Create a Watch Rule for a Specific Condition” on page 95, a saved report must be viewable in HTML format. You can select the data to be monitored and enter the threshold condition that will trigger the delivery of the report. Watch rules are saved to the **Rules** tab of **My Watch Items** “My Watch Items” on page 41, and can be maintained from that location.

This feature lets users maintain their own report distribution preferences and avoid information overload.

## Drilling Through on Multiple Values

Drilling through is now more powerful and flexible. You can pass multiple items, such as products, countries and regions, to a target report. You can now use this feature regardless of the type of drill-through path that was created. Drilling through is automatically enabled when you select multiple values.

In previous versions, passing multiple values was available only within drill-through paths created in IBM Cognos Connection.

## Go Directly to Target Report When Only One Target Report Exists

When there is only one target report available, you can now go directly to the target report when you click the drill-through link in Cognos Viewer. If there are multiple target reports available, you see the Go To page, which allows you to select the target report that you want. This behavior is automatic and works the same way whether the drill-through is defined in Report Studio or in a drill-through definition in IBM Cognos Connection.

For package-based drill-through, if there is only one target report, you click on the **Go To** link in the right-click menu to go directly to the target report (not **Related Links** that you see when you hover your mouse over the **Go To** menu). If there is more than one target report, clicking on **Go To** has the same effect as clicking on **Related Links**. In both cases, you see the **Go To** page, which allows you to select the target report that you want.

For more information, see "Drill Through to Another Target" on page 105.

## Saving Report Outputs to a File System

You can now export report results directly to a server file system using IBM Cognos Connection. You decide which formats to export, and select from a predefined set of directory locations. This feature makes it easy to integrate IBM Cognos content into other external applications.

IBM Cognos 8 does not keep a record of the exported reports, but does prevent and resolve name conflicts that arise when the same file is saved multiple times to the same directory. You are responsible for managing the reports after export. An XML descriptor file with the same file name prefix is created, which can be used by an external application to locate and manage the exported reports.

The export options appear as run options for a report, provided you were granted access to this feature. For more information, see "Save Report Output" on page 87.

## Resubmitting Failed Jobs and Reports

You can resubmit a failed job or report. For example, you discover that 20 reports in a job containing 1,000 reports fail due to an invalid signon. The problem is corrected and the job is resubmitted so that only the 20 failed reports are rerun.

In previous versions, if you submitted a report and it failed, the run options associated with the report were lost. Now the report can be resubmitted without having to reset the run options.

Failed reports, jobs, and agent tasks can be resubmitted from the run history, accessed from the **Past activities** page of **IBM Cognos Administration**, or accessed from the **Actions** page of the item.

## Default Actions for Agent Items

You can now choose a default action to use when an agent item is selected in IBM Cognos Connection, rather than automatically opening the agent in Event Studio.

The new choices are:

- show the most recent event list
- run the agent
- open the agent in Event Studio

The default action is defined on the **Agent** tab of the item properties in IBM Cognos Connection.

## Resubmitting Failed Agent Tasks

Failed agent tasks can now be resubmitted with their original data values. In previous versions, if a task failed, the data passed to the task was lost. Rerunning the agent may not solve this problem if the task is set to process new events only.

## Tabbed Portal Pages

You can now create pages with multiple tabs that are easy to navigate. The new type of pages is also referred to as dashboards. Dashboards are created by using a new portlet named Multi-page.

For more information, "Create a Dashboard with Multiple Tabs" on page 61.

## Global Filters and Enhanced Portal Interactivity

You can select the dashboard context in the portal with one or more global filters. A global filter may be a prompt, a drill-up or drill-down action, or a report that is based on drill-through content. For example, you can add a prompt control to a portal page to automatically pass the selection to all reports on the page. When a prompt answer is changed, all related reports will refresh accordingly. So, if you answer a country or region prompt with Brazil, all related reports on the page will be filtered to show the data for Brazil.

When these techniques are used on a tabbed dashboard, the context is passed to all corresponding sections of the dashboard. This functionality allows for a single selection to drive a number of reports at once.

For more information, see "Adding Interactivity to Pages and Dashboards" on page 64.

## Metric Studio Content in Portal Pages

An IBM Cognos Connection page or a dashboard can now display more types of Metric Studio metrics and a history chart.

This new content can be added by using the following new portlets:

- Metric List

  Use to add a watchlist, an accountability list, a scorecard metric list, or a strategy metric list to the page.

- Metric History Chart

  Use to add a graphical chart that illustrates the historical performance of a metric to the page.

For more information, see Chapter 5, “Pages and Dashboards,” on page 53.

### Support for Microsoft Excel 2007

IBM Cognos 8 supports Microsoft Excel spreadsheet software 2007 native spreadsheets as a report format, in addition to the existing Microsoft Excel HTML formats. The Microsoft Excel 2007 XML format, also known as XLSX, provides a fast way to deliver native Excel spreadsheets to Microsoft Excel XP, Microsoft Excel 2003, and Microsoft Excel 2007.

The use of a native Microsoft Excel format means that the spreadsheets are smaller and more usable. Because the new Office Open XML format is a recognized industry standard supported by ECMA International, the new format provides the added benefit of an open, documented integration format that extends an open systems solution.

The new format appears in the run report user interface. Users of Microsoft Excel XP and Microsoft Excel 2003 must install the Microsoft Office Compatibility Pack, which provides file open and save capabilities for the new format.

For more information about Excel format support, see “Microsoft Excel Formats” on page 84.

## Changed Features in Version 8.3

Listed below are changes to features since the last release. Links to directly-related topics are included.

### Updated IBM Cognos Connection Look

The IBM Cognos Connection user interface was changed to provide more space for reports and information that you care about, and use less space for toolbars and functions.

The new features include:

- The **Launch** menu, which replaces the **Tools** menu.

  This menu lets you access the IBM Cognos 8 studios, **Drill-through Definitions**, and **IBM Cognos Administration**.

- The my area icon , which lets you access the **My Watch Items**, **My Preferences**, and **My Activities and Schedules** areas in IBM Cognos Connection.
- The portal style named **Business**.
- The updated **Welcome to IBM Cognos 8** page.

For more information, see “Personalize the Portal” on page 38.

### More Information in the Go To Page

Additional information was added to the Related Links page. Related Links, also known as the Go To page, is used to show users all of the drill-through paths

available from a source report. The page now automatically shows more information, such as the target report and its location. This information helps you choose which drill-through path to use.

## Cognos Watchlist Portlet

The Cognos Watchlist Portlet was replaced by the Metric List portlet. In the new portlet, the watchlist is now one of the selectable options.

For more information, see Chapter 5, “Pages and Dashboards,” on page 53.

# Chapter 2. Building IBM Cognos Business Intelligence Applications

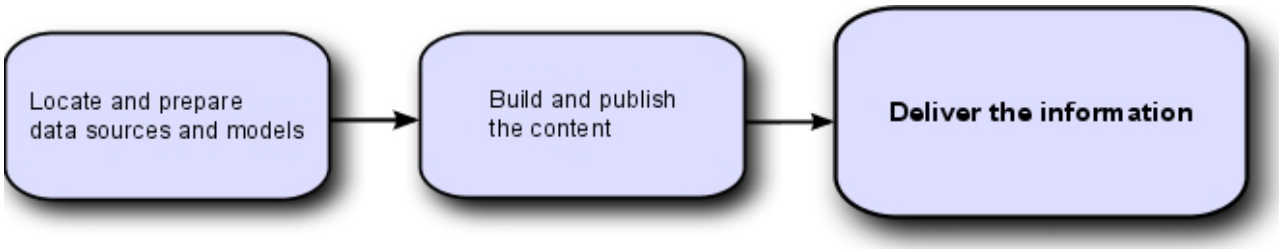
You use the IBM Cognos Business Intelligence components to build reporting and analysis applications.

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 Business Intelligence Administration and Security Guide* and the *IBM Cognos Framework Manager User Guide*.

## Before you begin

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 Business Intelligence 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 http://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.




## Procedure

1. 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.

2. Build and publish the content

   Reports, scorecards, analysis, workspaces and more are created in the business intelligence studios of IBM Cognos BI. Which studio you use depends on the content, life span, 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

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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.

3. 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.

   For information about tuning and performance, see the *IBM Cognos BI Administration and Security Guide* and http://www.ibm.com.

# Chapter 3. IBM Cognos Connection

IBM Cognos Connection is the portal to IBM Cognos software. IBM Cognos Connection provides a single access point to all corporate data available in IBM Cognos software.

You can use IBM Cognos Connection to work with entries such as reports, analyses, queries, agents, metrics, and packages. You can use IBM Cognos Connection to create shortcuts, URLs, and pages, and to organize entries. You can personalize IBM Cognos Connection for your own use.

You can use IBM Cognos Connection to create and run reports and cubes and distribute reports. You can also use it to create and run agents and schedule entries.

If you use a customized user interface, you may not have access to all the features documented.

**Related concepts**

"Distributing Reports" on page 101
You can distribute reports to other users to share information with them.

Chapter 6, "Reports and Cubes," on page 71
You can use reports, cubes, and documents to analyze data and help you make informed and timely decisions.

Chapter 9, "Agents," on page 141
You can create agents in Event Studio to monitor your organization's data for occurrences of business events. After an agent is published to the portal, use IBM Cognos Connection to manage it.

Chapter 12, "Schedule Management," on page 165
You can schedule IBM Cognos entries to run at a time that is convenient for you. For example, you may want to run reports or agents during off hours when demands on the system are low. Or you may want to run them at a regular weekly or monthly interval.

## Log On

IBM Cognos software supports authenticated and anonymous user access. To use IBM Cognos software as an authenticated user, you must successfully log on. During the logon process, you must provide your credentials, such as user ID and password, as required by your organization. Anonymous users do not log on.

**Tip:** If you want to see a summary of your logon information for the current session, in the portal, click **My Area Options**, **My Preferences** and then click the **Personal** tab. This is not available to anonymous users.

### Procedure

1. In the portal, click **Log On**.
2. If the namespace **Logon** page appears, in the **Namespace** box, click the namespace you want to use.
3. Click **OK** and type your user ID and password.
4. Click **OK**.

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Your session starts.

## Log Off

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

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

### Procedure

1. In the portal, click **Log Off**.

   You are now logged out of all the namespaces you were using.
2. Choose whether to log on again:
   - If you do not want to log on again, close your Web browser.
   - If you want to log on as an authenticated user, click **Log on again**.
   - If you want to log on as an anonymous user, click **Open a session as an anonymous user**. This is available only if your administrator set it up.

## Create a Shortcut

A shortcut is a pointer to another entry such as a report, report view, folder, job, agent, page, or URL.

You can use shortcuts to organize information that you use regularly. For example, if you frequently use a report in Public Folders, you can create a shortcut in My Folders.

If you want to make a new entry, it might be easier to make a copy of an existing entry and modify it. For more information, see "Copy an Entry" on page 27. If you want to run an existing agent or report with some minor changes, create an agent view "Create an Agent View" on page 142 or a report view "Create a Report View" on page 79. For example, to change the format, language, or delivery method of a report, create a report view.

You cannot update the source entry by clicking the shortcut. Updating the source automatically updates all shortcuts to the entry.

**Tip:** If the source entry was deleted or moved to another location, the shortcut icon changes to indicate a broken link.

You can change access permissions for a shortcut entry, but it does not change the access permissions for the source entry.

### Procedure

1. In IBM Cognos Connection, locate the entry you want to create a shortcut to.
2. Under **Actions**, click **More** and then click **Create a shortcut to this entry** .
3. In the **Name** box, type the name of the shortcut.
4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view. For more information, see "Personalize the Portal" on page 38.

The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

5. If you do not want to use the target folder shown under **Location**, choose another location:
   - Click **Select another folder**, select the target folder, and click **OK**. If the folder box is empty, go back one folder level using the path at the top of the dialog box.
   - Click **Select My Folders** as the location.
6. Click **Finish**.

### Results

In the portal, shortcut entries are identified by the shortcut icon .

## Create a URL

A URL is a standard way of identifying the location for any external file or Web site. Create URLs to keep the files and Web sites you use most frequently at your fingertips. Clicking a URL opens the file or Web site in the browser. After opening a URL, click the back button in your browser to return to the portal.

The URL must contain a valid server name that is included in the valid domains list, as specified by your administrator. Otherwise, you cannot create the URL.

### Procedure

1. In IBM Cognos Connection, go to the folder where you want to create the new URL.
2. Click the new URL button on the toolbar.
3. In the **Name** box, type the name of the new URL.
4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view "Personalize the Portal" on page 38. The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.
5. In the **URL** box, type the URL location.

   If the URL points to a Web site address, the protocol must be included. For example, to create a URL for the IBM Cognos Web site, type http://www.cognos.com.

   The URL must use a valid domain, as specified by your administrator. To view a list of acceptable domains, click **View acceptable domains**.
6. If you do not want to use the target folder shown under **Location**, choose another location:
   - Click **Select another folder**, select the target folder, and click **OK**. If the folder box is empty, go back one folder level using the path at the top of the dialog box.
   - Click **Select My Folders** as the location.
7. Click **Finish**.

### Results

In the portal, URL entries are identified by the URL icon .

## Bookmark an Entry

You can bookmark an IBM Cognos entry in your Web browser so that later you can quickly perform the default action associated with the entry. For example, using a report bookmark, you can view the most recent report output, run the report, or open it in an authoring tool.

For more information, see "Set Default Report Options" on page 73.

The bookmark saves the URL of the entry and its default action at the time when the bookmark was created.

Some default actions are available only to users who

- have the required access permissions for the entries.
- have the required product components installed.
- have access to specific, secured functions and features.

  For example, the capabilities to use a specific IBM Cognos Business Intelligence studio.
- use specific Web browsers.

For example, to open an agent, users must have read and traverse permissions for the agent, have Event Studio installed and the permissions to use it, and use Microsoft Internet Explorer as their Web browser.

### Using Any Web Browsers

The procedure to add a bookmark for any web browser is as follows.

#### Procedure

1. In IBM Cognos Connection, locate the entry for which you want to create a bookmark.
2. In the **Actions** column, click the set properties button for the entry.
3. On the **General** tab, click **View the search path, ID and URL**.
4. Right-click the link that appears under **Default action URL**.

   The link shows the entry name and the action that will be performed. If the entry has no default actions, the link is replaced by **None**. The text below the link shows the URL used by the link.

   A menu box specific to your Web browser appears.
5. From the menu, click the option for creating bookmarks.

   For example, if you are using Internet Explorer, click **Add to Favorites**. If you are using Firefox, click **Bookmark This Link**.
6. Create the bookmark as you normally do in your Web browser.

### Using Internet Explorer

The procedure to add a bookmark using Internet Explorer is as follows.

### Procedure

1. In IBM Cognos Connection, locate the entry for which you want to create a bookmark.
2. In the **Actions** column, click **More**.
3. In the list of actions available for this entry, click **Add to bookmarks** .
   The Internet Explorer box for adding favorites appears.
4. Create the bookmark as you normally do in Internet Explorer.

## Entry Properties

You can control the way an entry appears and behaves by modifying its properties. The properties for entries vary depending upon the type of entry selected and your privileges. For example, reports have properties to control run options while folders do not. If a property is not applicable to the type of entry you are customizing, it will not appear in the **Set properties** page.

### General Properties

General properties appear on the **General** tab of the **Set properties** page.

| Property | Description |
|---|---|
| Type | The type of entry. |
| Owner | The owner of the entry. By default, the owner is the person who created the entry. When the owner no longer exists in the namespace, or is from a different namespace than the current user, the owner shows as **Unknown**.<br><br>If you have Set policy permissions, click **Make me the owner** to become the owner of the entry. |
| Contact | The person responsible for the entry. Click **Set the contact** and then click **Select the contact** to set the contact for the entry or click **Enter an email address** to enter the contact's email address. |
| Location | The location of the entry in the portal and its ID. Click **View the search path, ID and URL** to view the fully qualified location and the ID of the entry in the content store.<br><br>Entries are assigned a unique identification (ID) number. For more information, see “Organizing Entries” on page 27. |
| Created | The date the entry was created. |
| Modified | The most recent date that the entry was modified. |

| Property | Description |
| --- | --- |
| Icon | The icon for the entry. Click **Edit** to specify an alternative icon. For more information, see "Specify an Alternative Icon for an Entry" on page 35. |
| Indexed | The timestamp indicating when the entry was last indexed. The property does not appear if the entry has not been indexed. |
| Disable this entry | When selected, users that do not have write permissions for this entry cannot access it. The entry is no longer visible in the portal.<br><br>If an entry is disabled and you have write access to it, the disabled icon appears next to the entry. |
| Hide this entry | Select this property to hide reports, packages, pages, folders, jobs, and other entries. Hide an entry to prevent it from unnecessary use, or to organize your view. The hidden entry is still accessible to other entries. For example, a hidden report is accessible as a drill-through target.<br><br>A hidden entry remains visible, but its icon is faded. If you clear the **Show hidden entries** check box in my area options , **My Preferences**, the entry disappears from your view.<br><br>You must have access to the **Hide Entries** capability granted by your administrator to see this property. |
| Language | A list of languages that are available for the entry name, screen tip, and description according to the configuration set up by your administrator.<br><br>Click **Remove values for this language** to remove the entry name, screen tip, and description for a specified language. |
| Name | The name of the entry for the selected language. |
| Screen tip | An optional description of the entry. The screen tip appears when you pause your pointer over the icon for the entry in the portal. Up to 100 characters can be used for a screen tip. |

| Property | Description |
| --- | --- |
| Description | An optional description of the entry. It appears in the portal when you set your preferences to use the details view.<br><br>Details view appears only in Public Folders and My Folders. |
| Run history | The number of occurrences or period of time to retain run histories for the entry. |
| Report output versions | The number of occurrences or period of time to keep report outputs.<br><br>Setting this value to zero (0) saves an unlimited number of versions. |
| Package | The package that is associated with the entry. If the source package was moved or deleted, the text reads "Unavailable."<br><br>Click **Link to a package** to link the entry to a different package. For more information, see “Select a Link for an Entry” on page 32. |
| URL | A URL to either a file or Web site address. For more information, see “Create a URL” on page 17.<br><br>This field is visible only if you have read permissions for the entry. If you have write permissions without read permissions, this property is not visible. |
| Source report | A path to the source entry for a report view. If the source entry was moved or deleted, the text reads "Unavailable."<br><br>Click **Report Properties** to view the properties of the source report. Click **Link to a report** to link the entry to a different package. For more information, see “Select a Link for an Entry” on page 32. |
| Source agent | A path to the source entry for an agent view. If the source entry was moved or deleted, the text reads "Unavailable."<br><br>Click **Agent Properties** to view the properties of the source report. Click **Link to an agent** to link the entry to a different package. For more information, see “Select a Link for an Entry” on page 32. |

| Property | Description |
| --- | --- |
| Shortcut to | A path to the entry that the shortcut points to. If the referred entry no longer exists, the text reads "Source entry not found."<br><br>Click **Source Properties** to view the properties of the source entry. |
| Advanced routing | A list of keywords used to direct requests by package, user group, or user role to dispatchers in identified server groups.<br><br>Click **Set** to add routing keywords for packages, user roles, or user groups. The rules used to direct the requests are part of **IBM Cognos Administration**. |
| Gateway | The location of the web server where the originating IBM Cognos product resides. Applies only to Series 7 PowerPlay reports. |

## Permissions

Permissions appear on the **Permissions** tab of the **Set properties** page.

| Property | Description |
| --- | --- |
| Override the access permissions | Whether to replace the permissions that are inherited from the parent entry. |
| Access permissions (Name, Type, Permissions) | The permissions that are set for the entry. You can grant or deny read, write, execute, set policy, and traverse permissions. For more information, see Chapter 4, "Access Permissions and Credentials," on page 45.<br><br>Click **Add** to add more names to the list. Click **Delete** to delete names from the list. |
| Delete the access permissions of all child entries | Whether to remove the existing access permissions for all child entries so that they will use the access permissions for this entry. |

## Report, Query, Analysis, and PowerPlay Report Properties

Report properties appear on the following tabs of the **Set properties** page:

- the **Report** tab for Report Studio reports
- the **Query** tab for Query Studio reports
- the **Analysis** tab for Analysis Studio reports
- the **PowerPlay Report** tab for Series 7 PowerPlay reports

| Property | Description |
| --- | --- |
| Default action | The default action when the report is run. |
| Report options: Override the default values | Whether to override default run options for the report. When selected, the values that you can override appear. |
| Format | The default format, orientation, and paper size to use when the report runs. Appears only if **Override the default values** is selected. |
| Accessibility | Whether to create report output that supports accessibility. Enabling support creates report output that can be read by a screen reader. |
| Language | The default language to use for the report data when the report runs. Appears only if **Override the default values** is selected. |
| Prompt values | The values that are used to filter data when a report is run. For more information, see "Specify the Default Prompt Values for a Report" on page 86. |
| Run as the owner | Whether to use the owner credentials when the report is run. For more information, see "Trusted Credentials" on page 50. |
| Run as the owner: Capabilities only | Whether to use only the owner capabilities and not the owner credentials when the report is run. For more information, see "Running reports with report owner capabilities" on page 77. |
| HTML options: Open in design mode | Whether to open an HTML-format Series 7 PowerPlay report in design mode. |
| Number of rows per Web page in HTML reports | The number of rows you want to appear per Web page in HTML reports |
| Enable selection-based interactivity in HTML reports | Whether to enable the following in HTML reports that are viewed in IBM Cognos Viewer: drill up and drill down, drill through, IBM Cognos Search, watch rules, and agent notification. For more information, see "Disable Selection-based Interactivity" on page 100.<br><br>Note that to have watch rules evaluated in saved report output, you must select the **Enable enhanced user features in saved output versions** check box. |

| Property | Description |
| --- | --- |
| Enable alerts about new versions | Whether to allow report consumers to receive alerts about new versions of a saved report. If this check box is cleared, you are prompted whether to remove all users from the alert list. |
| Enable enhanced user features in saved output versions | Whether to create additional output formats so that watch rules can be evaluated and saved output versions can be imported into IBM Cognos for Microsoft Office.<br><br>Note that to enable watch rules, you must select the **Enable selection-based interactivity in HTML reports** check box. |
| Enable comments in saved output versions | Whether to allow users to add comments to saved reports. For more information, see "Comments in Saved Reports" on page 98. |
| Refresh the report cache | Create new cache data if none is available, when the report runs interactively. |
| Cache duration | The number of days or months before the report cache data expires. To enable the cache duration, select the **Refresh the report cache** check box. |

## Job Properties

Job properties appear on the **Job** tab of the **Set properties** page.

| Property | Description |
| --- | --- |
| Steps | A list of steps in the job. |
| Submission of steps | Whether to run job tasks all at once or in sequence. |
| Defaults for all steps | Set default values at the job level. Click **Set**, then specify the defaults for all steps of the job. If no defaults are set, the defaults for the individual steps are used. |

| Property | Description |
| --- | --- |
| Run history details level | Click **All** to save the complete history details for the job steps when the run activity completes successfully. The complete history details for the job steps includes **Name**, **Request time**, **Start time**, **Completion time**, **Status**.<br><br>Click **Limited** to save limited run history details for the job. The limited run history details include the job start time, completion time, status and messages.<br><br>If the job run fails, the complete history details are saved. The default is **All**.<br><br>The Run history details level setting for the job overrides the settings of the job steps. |

## Agent Properties

Agent properties appear on the **Agent** tab of the **Set properties** page.

| Property | Description |
| --- | --- |
| Tasks | A list of tasks in the agent. |
| Default action | The default action when the agent is run. |
| Prompt values | The values that are used to filter data when an agent is run. For more information, see "Run an Agent" on page 141. |
| Run as the owner | Whether to use the owner credentials when the agent is run. For more information, "Trusted Credentials" on page 50. |
| Run as the owner: Capabilities only | Whether to use only the owner capabilities and not the owner credentials when the report is run. For more information, see "Running reports with report owner capabilities" on page 77. |
| Alert list | Whether to allow users to add themselves to the alert list for an agent. |

## Page Properties

Page properties appear on the **Layout and Content** and **Page Style** tabs of the **Set properties** page.

| Property | Description |
| --- | --- |
| Number of columns | The number of columns used to organize the content of a page.<br><br>Up to three columns can be used. |

| Property | Description |
| --- | --- |
| Content | Type of content added to a page.<br><br>Use to add and remove portlets, distribute the portlets between the columns, change the order of columns and specify their width. |
| Language | The language in which the page title and instructions can be typed. It should match the product language. |
| Title | The page title. You can format the title by changing the font and character style, and the text alignment. To return to the default browser settings, click **Return to default**. To modify the default settings, click **Custom**.<br><br>You can hide the title. |
| Instructions | Additional information about the page. You can format the text of instructions by changing the font and character style, and the text alignment. To return to the default browser settings, click **Return to default**. To modify the default settings, click **Custom**.<br><br>You can hide the instructions. |
| Portlet style | The way a portlet appears on a page. To avoid cluttering the page, you can hide the portlet borders, title bars, and the edit button on the title bar. |

## Rule Properties

Use the rule properties to define or modify a watch rule. You can access the rule properties from the **My Watch Items**, **Rules** tab by clicking the set properties icon for a watch rule entry. The properties are located on the **Rule** tab of the **Set Properties** page.

The rule properties specify conditions in saved HTML report output so that when the report is saved and the conditions are satisfied, you are alerted.

For information about creating watch rules, see "Create a Watch Rule for a Specific Condition" on page 95.

The following table describes the rule properties that are available.

| Property | Description |
| --- | --- |
| Disable the rule | Whether to disable the watch rule. When disabled, the watch rule is not applied when report output is generated. |

| Property | Description |
| --- | --- |
| Send an alert when the report *reportname* contains: | The name of the report and the rule defined for the watch rule.<br><br>To edit the definition, click the existing filter condition, such as greater than (>), and in the list that appears, click a different condition. Specify a different value in the box. |
| For the selected context | The objects in the report to which the rule applies. |
| Alert type | The type of alert you receive when the rule is satisfied. You can be alerted by email or news item. |

## Organizing Entries

Organize entries such as reports, analyses, agents, and packages in a meaningful way so that you can easily find them. It is important to plan how you can best organize entries in the portal. Review the entries and attempt to group them in a logical way. Consider grouping the entries by type or frequency of use.

You may decide to create a folder hierarchy by using nested folders. The folder structure should be logical and should support the chosen method of grouping.

Use meaningful names and detailed descriptions to identify entries in the portal.

You can copy, move, rename, or delete entries. You can create copies of entries and store them in multiple folders for easy access. You can disable entries and specify the order of entries. You can select a link for an entry. For example, if a report is deleted, you may want to link an associated report view to a different report. You can also hide an entry to prevent it from unnecessary use.

Remember that an entry often refers to other entries such as packages, reports, analyses, or queries. In addition, there may be references to entries in job steps, agents tasks, drill-through targets, or metrics. Reference IDs are hard-coded in the specification for each entry.

### Copy an Entry

When you create a copy of an entry, you create a replica of that entry in another location in the portal. For example, create a copy if you want to use a generic report as the underlying structure for additional reports. The copy of the entry has a new ID. If there is another entry of the same name in the target location, you are prompted to replace the existing entry with the copied entry. If you choose to replace the existing entry, the ID of the existing entry is used.

If you copy a folder, references for entries in the folder that reference each other are updated to reference entries in the copied folder.

If you want to run an existing agent or report with some minor changes, create an agent view “Create an Agent View” on page 142 or a report view “Create a Report

View" on page 79. For example, to change the format, language, or delivery method of a report, create a report view. You can copy multiple entries at the same time to the same location.

If you want a report to appear in more than one location, create a shortcut "Create a Shortcut" on page 16.

You must have read permissions for an entry you are attempting to copy. You must also have traverse permissions for the current folder, and write and traverse permissions for the target folder Chapter 4, "Access Permissions and Credentials," on page 45.

### Procedure

1. In IBM Cognos Connection, select the check boxes next to the entry or entries you want to copy.
2. Click the copy button on the toolbar.
3. Go to the desired location for the new entry or entries and click the paste button on the toolbar.
4. If an entry name is the same as an entry name in the destination folder, choose whether you want to replace the existing entry with the one that you are copying:
   - To replace the existing entry, click **Yes**.
   - To cancel the copy, click **No**.

## Move an Entry

When you move an entry, you remove it from the current folder and place it in another folder.

You may decide to move an entry if your folder becomes so full that it is difficult to locate particular entries. You can create a series of subfolders and move the entries to support your new folder hierarchy. For example, a folder containing weekly sales reports can be divided into sales reports by month or by author.

When you move an entry, the ID stays the same. References to the entry from other entries are not broken. However, shortcuts to the entry no longer work.

For example, a report has several report views associated with it. When you move the report to another location in IBM Cognos Connection, the references in the associated report views are not broken. However, shortcuts to the entry no longer work.

When you move an entry, if there is another entry of the same name in the target location, you are prompted to replace the existing entry with the moved entry. If you choose to replace the existing entry, the ID of the existing entry is kept. References to the moved entry are broken. Shortcuts to the entry no longer work.

If you want to use a generic entry as the underlying structure for additional entries, make a copy of the entry "Copy an Entry" on page 27. If you want an entry to appear in more than one location, create a shortcut "Create a Shortcut" on page 16. If you want to run an existing agent or report with some minor changes, create an agent view "Create an Agent View" on page 142 or a report view "Create

a Report View" on page 79. For example, to change the format, language, or delivery method of a report, create a report view.

### Before you begin

You must have read permissions for the entry you are attempting to move. You must also have write and traverse permissions for the current folder and for the target folder.

### Procedure

1. In IBM Cognos Connection, select the check boxes next to the entry or entries you want to move.
2. Click the cut button on the toolbar.
3. Go to the desired location for the entry or entries and click the paste button on the toolbar.
4. If an entry name is the same as an entry name in the destination folder, choose whether you want to replace the existing entry with the one that you are copying:
   - To replace the existing entry, click **Yes**.
   - To cancel the copy, click **No**.

## Rename an Entry

You may decide to rename an entry. Perhaps the current name for an analysis is confusing or the purpose of a report changed.

When you rename an entry, the ID stays the same. However, the search path changes. References to the entry from other entries are not broken. Shortcuts to the entry no longer work.

For example, a package has reports, agents, and drill-through definitions associated with it. When you rename the package, the references in the associated reports, agents, and drill-through definitions are not broken.

You cannot rename an entry to the same name as another entry that already exists in the same location.

### Before you begin

You must have read permissions for the entry you are attempting to rename. You must also have write and traverse permissions for the current folder and for the target folder.

### Procedure

1. In IBM Cognos Connection, locate the entry you want to rename, and in the **Actions** column, click the set properties button .
2. Click the **Properties** tab.
3. In the **Name** box, type a new name for the entry.
4. Click **OK**.

## Disable an Entry

You can disable entries to prevent users from accessing them.

Disabling entries is useful when you want to perform maintenance operations. For example, you may want to disable a folder while you reorganize its content. When you disable a folder, the folder content is also disabled.

If an entry is disabled, the disabled icon appears beside the entry to indicate that it is disabled.

If the source entry is disabled, all shortcuts to the entry appear with the source disabled icon , indicating that it no longer works.

### Before you begin

You must have read and write permissions for an entry Chapter 4, "Access Permissions and Credentials," on page 45 to enable or disable it. You must also have traverse permissions on the folder that contains the entry.

### Procedure

1. In IBM Cognos Connection, locate the entry you want to disable and, in the **Actions** column, click the set properties button .
2. Click the **General** tab.
3. Select the **Disable this entry** check box.

   **Tip:** To enable a disabled entry, clear the **Disable this entry** check box.
4. Click **OK**.

### Results

If you have only read, execute, or traverse permissions for a disabled entry, you cannot see the entry in the portal. If you have write or set policy permissions for a disabled entry, it appears in the portal with the disabled icon .

## Hide an Entry

You can hide entries in IBM Cognos Connection and IBM Cognos Administration such as reports, packages, pages, folders, jobs, data sources, portlets, and so on, to ensure that the entries are not accessed or run unnecessarily. This specifically applies to drill-through reports that, when they run, could have negative impact on system performance. For example, running drill-through reports that have optional prompts, or no prompts, could result in database queries that use considerable resources. When these reports are hidden in the portal, users cannot run them and the system is not overloaded with unnecessary requests.

Hiding an entry does not affect its properties, including security permissions. You can access hidden entries using different methods, such as using a URL.

Depending on the user preferences specified in my area options , **My Preferences**, a hidden entry either entirely disappears from the user interface or remains visible, but its icon fades. For more information, see "View a Hidden Entry."

You cannot hide users, groups, or roles in external namespaces.

## Before you begin

An administrator controls which users, groups, or roles can hide entries by granting the users access to the **Hide Entries** capability in IBM Cognos Administration. Only users who have access to this capability can perform the following steps.

## Procedure

1. In IBM Cognos software, locate the entry that you want to hide, and click its set properties button .
2. On the **General** tab, select the **Hide this entry** check box.
3. Click **OK**.

   The entry is now hidden; however, it may still appear in the user interface with a faded icon. To remove the entry from your view, see "View a Hidden Entry."

## View a Hidden Entry

Users can change their preferences to either show or remove hidden entries from the user interface. Icons that represent hidden entries are faded.

Depending on the preferences, a hidden entry may or may not appear in search pages, wizards, save as boxes, and so on. For example, when the user interface does not show hidden entries, hidden packages do not appear in the list of available packages when users try to open the applicable studio, and the search results do not include the packages.

The following are the rules that apply to viewing hidden entries:

- A hidden report is accessible as a drill-through target.

  Drill-through targets include parameter values to avoid resource-intensive query operations. However, the user still requires read and execute permissions to use this target report in a drill-through activity.
- A hidden drill-through definition is not displayed in the **Go To** page if the user interface does not show hidden entries.
- A visible shortcut can point to a hidden entry. If the shortcut points to a hidden folder, any hidden entries in the folder are not visible.
- Search pages do not return hidden entries if the user interface does not display the entries.

The following, are examples of situations when hidden entries are always visible, regardless of the user preferences for viewing hidden entries.

- Hidden entries on the **Permissions** and **Personal** tabs

  The entries icons are faded.
- Portal tabs associated with hidden pages

- Portlets in a page
- Job steps that refer to hidden entries already in a job

  The entries icons are faded.
- Agent tasks that refer to hidden entries already in an agent

  The entries icons are faded.
- Details in a report run history

  The icons that represent hidden entries do not change.

### Before you begin

Only users who have access to the **Hide Entries** capability in IBM Cognos Administration can perform the following steps.

### Procedure

1. Go to my area options and click **My Preferences**.
2. On the **General** tab, select or clear the **Show hidden entries** check box.

   If you select this check box, the hidden entries appear in the user interface with faded icons. If you clear this check box, the hidden entries disappear from the user interface.
3. Click **OK**.

## Select a Link for an Entry

Some entries are linked to other entries when they are created. For example, a report view is linked to a report and a report or agent is linked to a package. Metrics are linked to a metrics package.

You can change the link for an entry. For example, if a report is deleted, you may want to link an associated report view to a different report. After you change the link, the report view reflects the content of the new report.

Select a link that is appropriate for the entry. For example, the package that a report is linked to must contain a valid model for the report to run correctly.

If the link associated with the entry is not available, **Unavailable** appears. For example, **Unavailable** appears if the package that a report is linked to is deleted.

### Before you begin

You must have write permissions for the entry you are attempting to select a link for. You must also have write and traverse permissions for the current folder.

### Procedure

1. In IBM Cognos Connection, locate the entry you want and click the set properties button .
2. Click the **General** tab and find the current link for the entry.

   For example, for a report, look in **Package**. For a report view, look in **Source report**.
3. Click the link.

For example, for a report, click **Link to a package**. For a report view, click **Link to report**.

4. Select the new entry that you want to link the entry to and click **OK**.

## Delete an Entry

When you delete an entry, you permanently remove it from the portal and its ID is deleted. You may decide to delete an entry because it is outdated or may no longer satisfy your requirements.

Deleting the source entry for a shortcut removes only the source entry. The shortcut entries remain but have an invalid reference icon and are not accessible.

Deleting a shortcut or a report or agent view removes only the selected entry and not the source entry. References from other entries no longer work.

### Before you begin

You must have write permissions or set policy permissions for the entry you are attempting to delete. You must also have write and traverse permissions for the current folder.

### Procedure

1. In IBM Cognos Connection, select the check boxes next to the entries you want to delete.
2. Click the delete button on the toolbar.
   A confirmation box appears.
3. Click **OK**.

## Specify the Order of Entries

You can specify the order of folders and entries in the portal. You may decide to organize entries by level of usage and place entries that you use daily at the top of the list.

By default, existing entries are sorted alphabetically. Entries added after the order is specified are shown at the end of the list.

To specify the order of entries, you must have read and write permissions for all entries in the folder and read and traverse permissions for the folder containing the entries.

### Procedure

1. In IBM Cognos Connection, click the tab you want.
2. Click the order button on the toolbar.
3. Select the entries in the **Shown in default order** list box and click the right-arrow button to move them to the **Shown first** list box.
   **Note:** You specify the order of folders and entries independently.

4. Click the **Up**, **Down**, **To top**, and **To bottom** links to move the folders and entries within the list.
5. Click **OK**.

## Create a Folder

You can organize entries into folders. Having folders that are logically labeled and organized helps you easily locate reports. For example, you might want to create folders in **My Folders** or **Public Folders** to help you organize your entries.

You can create folders in the following locations:

- Public Folders

  Entries that are placed in Public Folders are of interest to and can be viewed by many users. When the focus is on the Public Folder tab, the content is grouped by packages or folders. Each package contains a single model and all related entries, such as folders, reports, jobs, report views, agents, metrics, URLs, and shortcuts.
- My Folders

  You create personal folders and use them to organize entries according to your preferences. My Folders are accessible by you only when you are logged on.

You must have write access to a folder to create entries in it.

**Tips**: Click **More** to view a full list of actions that can be performed on an entry.

Click **Set Properties** to change the general properties, defaults, permissions, and job properties for an entry. Not all properties are available for each type of entry.

### Procedure

1. In IBM Cognos Connection, go to the location for the new folder.
2. Click the new folder button on the portal toolbar.
3. In the **Name** box, type the name of the new folder.
4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view "Personalize the Portal" on page 38. The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.
5. If you do not want to use the target folder shown under **Location**, choose another location:
   - Click **Select another folder**, select the target folder, and click **OK**. If the folder box is empty, go back one folder level using the path at the top of the dialog box.
   - Click **Select My Folders** as the location.
6. Click **Finish**.

### Results

The new folder has the same permissions as the parent folder. For information about changing access permissions, see Chapter 4, "Access Permissions and Credentials," on page 45.

## Specify an Alternative Icon for an Entry

In the portal, the standard icons that appear next to entries help identify the class to which the entry belongs. To better identify an entry among several similar entries, you can replace the standard icon with an alternative icon.

When you specify an alternative icon, use a screen resolution of 16 x 16 pixels to ensure that the icon is properly aligned and spaced in the portal.

Customizations, such as alternative icons, are not maintained automatically. As a result, alternative icons must be ported manually upon upgrade.

### Procedure

1. In IBM Cognos Connection, locate the entry you want and click the set properties button.
2. Click the **General** tab and next to **Icon**, click **Edit**.
3. Click **Specify an icon**, and in the edit box, specify a name for the image, for example, myicon.gif.

   The image must exist in the folder c10_location/webcontent/ps/portal/images.
4. Click **OK**.

### Results

Wherever the entry appears in the portal, the alternative icon appears instead of the standard icon.

## Search options in IBM Cognos Connection

You can search for entries whose name, description, or both match the string entered in the search criteria. Or, you can search an index of entries created by your administrator using the Full text and all fields option.

By default, the following options are available.

- Full text and all fields
- Name field
- Description field
- Name or description field

The administrator can restrict searching for entries by making only the Full text and all fields option available. Full text and all fields search can also be restricted using the Execute Indexed Search capability. Without the Execute Indexed Search capability, you can do basic indexed search. With the Execute Indexed Search capability, you can do enhanced index search.

### Searching for entries using name, description, and name or description

You can search for entries whose name, description, or both match the string entered in the search criteria. Name, description, and name or description searches do not require a search index.

When the Name, Description, and Name or description options are used for searching, search ignores capitalization. The following table shows examples of search criteria and results.

| Method | Search criteria | Results |
|---|---|---|
| Contains the exact string | Report 1 | "Report 1", "Report 100", "Copy of Report 1" |
| Starts with the exact string | report | "report 1", "Report 100" |
| Matches the exact string | Report | "Report", "report" |

Entries for which you have access permissions are included in the search results.

For information about multilingual searches, see “Search for an Entry in Multiple Languages” on page 37.

## Procedure

1. For name, description, or name and description searches, go to the highest level folder you want to include in your search.

   **Tip:** You can increase or limit the folders to include in your search by changing the **Scope** when you enter the search criteria.
2. From the **Search Options**, specify one of the following:
   - **Name field**
   - **Description field**
   - **Name or description field**
3. Click the search button on the toolbar.
4. In the search box, type the phrase you want to search for.
5. Click **Advanced**.
6. Choose the type of match between the search string and the results:
   - To return entries that include the search string somewhere in the name or description, click **Contains the exact string**.
   - To return entries whose name or description begins with the search string, click **Starts with the exact string**.
   - To return entries whose name or description matches the search string word for word, click **Matches the exact string**.
7. In the **Type** box, click the type of entry to search for.

   **Tip:** To search for all shortcuts in the selected location, click **Shortcuts**.
8. In the **Modified** box, click the date that the entry was last modified.

   For example, if you want the search to return entries that were updated in the last week, click **In last week**.

   **Note:** This option is only available in the Cognos namespace.
9. In the **Scope** box, click the folders you want to include in the search.
10. Click the **Search** button .

    The entries matching the search criteria and for which you have permissions to view appear at the bottom of the screen under **Results**.

    **Tip:** To open an entry, click its link.

## Searching for entries using full text and all fields

When you search for entries using the Full text and all fields option, you search for entries in an index that has been created by your administrator. The search results can be refined after the initial search results are generated.

### Before you begin

Before you can search for an entry, the search index must be created.

### Procedure

1. From the **Search Options**, select the **Full text and all fields** search option.
2. Click the search button on the toolbar.
3. In the search box, type the phrase you want to search for.
4. Click **Advanced**.
5. In the **Search for type** box, click the type of entry to search for.
6. To refine your search further, use the options in the **Refine by** column, for example, **Type**, **Owner**, or **Creation Date**.

   The options that are available to you to refine your search depend on the search privileges granted by your administrator.

## Search for an Entry in Multiple Languages

The user's locale sets the default language for a search. You can customize this setting by changing the Content language option in the Set Preferences page, in My Preferences. If the Content language is English, then the search results are delivered in English.

For information about searching for an entry, see "Searching for entries using name, description, and name or description" on page 35.

When you perform a search, you can use a search term that is in a different language from the language specified by the Content language setting. To search in multiple languages, use the following syntax:

```
<search_term> +language: <locale>
```

Example: ventes +language: fr

Although you can search in different languages, you only receive search results if the search index supports that language. Your administrator specifies the languages that are supported.

### Procedure

1. Click the search button on the toolbar.
2. In the search box, type the phrase you want to search for. Use the following syntax:

   ```
   <search_term> +language: <locale>
   ```

### Results

The search returns a list of entries.

## Personalize the Portal

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

Changes take effect immediately in the current session. The preferences are stored and used for future sessions unless you change them.

You can change the following settings:

| General | Description |
| --- | --- |
| Number of entries in list view | The maximum number of rows that appear in a list before scrollbars are required. This applies to rows where scrolling is allowed. |
| Separators in list view | The method of separating entries in lists in Public Folders and My Folders.<br><br>Choose from no separator, grid lines, or alternating backgrounds. This setting applies to all lists with the exception of the output versions list. This setting is available only if you use Microsoft Internet Explorer Web browser or Firefox. |
| Style | The uniform look and feel applied to all components of IBM Cognos software.<br><br>You can choose from the styles available to you. |
| Show hidden entries | Use this setting to show or remove hidden entries from your view in IBM Cognos Connection.<br><br>When you select this check box, the hidden entries remain visible, but their icons are faded.<br><br>When you clear this check box, the hidden entries disappear from your view. For example, hidden packages are not visible in IBM Cognos Connection and in the associated studios.<br><br>You must have access to the **Hide Entries** capability granted by your administrator to see this setting. |

| General | Description |
| --- | --- |
| Default view | The decision to use list view or details view by default. List view shows the name, modified date, and actions. Details view shows the name, description, modified date, and possible actions.<br><br>Details view works only in Public Folders and My Folders in IBM Cognos Connection. In other components, list view is used. |
| Number of columns in details view | The maximum number of columns per row for the details view. |
| Report format | The preferred format to view the report. Choose between HTML, PDF, Delimited Text (CSV), Microsoft Excel spreadsheet software, and XML. |
| Show a summary of the run options | The option to show a summary of the run options when a report is not run interactively. |
| Show the Welcome page at startup | The option to show or hide the Welcome page at the beginning of a session. |
| Enable accessibility support for reports I run or schedule | The option to create accessible report output whenever I run or schedule a report. |
| Product language | The language used by the IBM Cognos user interface. It applies to all IBM Cognos components, such as IBM Cognos Connection, IBM Cognos Viewer, and Report Studio. |
| Content language | The language used to view and produce content in IBM Cognos software, such as names and descriptions of entries, or data in reports. |
| Time zone | The time zone used. Select the default server time zone set by your administrator. For more information, see the *IBM Cognos Business Intelligence Installation and Configuration Guide*. Or you can select another time zone. |

Personal settings appear if you have read permissions for your account.

| Personal | Description |
| --- | --- |
| Primary logon | The namespace and credentials that you used to log on to IBM Cognos software. Also shows the given name, surname, and email address if they have been defined. |
| Secondary logon | A list of secondary logons.<br><br>The secondary logons exists if you logged on to multiple namespaces. |
| Alerts | Use to specify an email address for alerts.<br><br>When the delivery service processes the alert list, it uses the email address specified in the **Email** box to send alerts to the user. If there is no email address specified, the email address specified in the **Primary logon** section is used. |
| Credentials | Authorization to other users, groups, and roles to run entries using the credentials.<br><br>Click **Renew the credentials** after you change your password, or to ensure that all credentials are available if you are logged on to multiple namespaces. |
| Groups and roles | A list of groups and roles associated both with your primary and secondary logons. |
| Capabilities | A list of secured functions and features that you can use based on both your primary and secondary logons. To create trusted credentials, see "Trusted Credentials" on page 50. |

Portal tabs settings appear if you have read permissions for your account.

| Portal Tabs | Description |
| --- | --- |
| List of entries | Represents the tabs, including Public Folders and My Folders, in your IBM Cognos Connection environment. |
| Add | Use to add a tab for a specified page in IBM Cognos Connection.<br><br>Each tab represents Public Folders, My Folders, or a page. |
| Remove | Use to remove a tab from IBM Cognos Connection. |

| Portal Tabs | Description |
| --- | --- |
| Modify the sequence | Use to change the order of tabs in IBM Cognos Connection. |

### Procedure

1. In IBM Cognos Connection, click **My Area Options**, **My Preferences**, and click the required tab.
2. Choose the appropriate settings.
3. Click **OK**.

## My Watch Items

Use the **My Watch Items** area of the portal to view and manage watch items from a single location. Watch items include alert lists and watch rules that help you monitor business events that are important to you.

The **Alerts** tab shows the alert lists to which you belong. Use this tab to remove yourself from the alert list for a report or agent.

The **Rules** tab shows the watch rules you created in saved HTML report output. Use this tab to

- edit a watch rule.
- enable or disable a watch rule. For information, see "Disable an Entry" on page 30.
- organize watch rules in folders. For information, see "Create a Folder" on page 34.
- delete a watch rule. For information, see "Delete an Entry" on page 33.
- edit the My Watch Items page properties. For information, see "Edit a Page" on page 56.

You can also add yourself to the alert list for a report "Adding or Removing Yourself from the Alert List for a Report" on page 93, add yourself to the alert list for an agent "Adding Yourself to or Remove Yourself from an Alert List for an Agent" on page 145, and create a watch rule for a report "Create a Watch Rule for a Specific Condition" on page 95.

The report owner must allow report users to receive alerts and create watch rules for the report.

### View Watch Items

To view the alerts lists to which you belong and the watch rules you created, use the **My Watch Items** area of the portal.

You can also remove yourself from an alert list "Remove Yourself from an Alert List" on page 42, and edit a watch rule "Edit a Watch Rule" on page 42.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click **My Area Options** , **My Watch Items.**

2. To view your alerts lists, click **Alerts**.
3. To view your watch rules, click **Rules**.

## Remove Yourself from an Alert List

To remove yourself from an alert list for a report or agent, use the **My Watch Items** area of the portal.

When you are added to an alert list, you receive an email notification when the report, or report associated with the agent task, is saved. After removing yourself from an alert list, you are no longer alerted.

**Tip:** You can also add or remove yourself from an alert list for a report using the **Report** tab of the **Set Properties** page "Adding or Removing Yourself from the Alert List for a Report" on page 93. For an agent, you can use the **Agents** tab of the **Set Properties** page "Adding Yourself to or Remove Yourself from an Alert List for an Agent" on page 145.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click **My Area Options** , **My Watch Items**.
2. Click the **Alerts** tab, and in the **Source** column, click the alert list to remove.
   You can select multiple alert lists.
3. Click the remove me from the alert list button.
4. Click the refresh button.
   Note that the alert list is removed from the **Source** column.

## Edit a Watch Rule

After creating watch rules in saved HTML report output, you can edit them from the My Watch Items area of the portal. For example, you can change the general properties, such as name, language, and description. You can also change the properties, such as the conditional expression for the rule, the items to which the rule applies, and the alert type.

For information about creating a watch rule, see "Watch Rules in Saved Reports" on page 94.

### Before you begin

To edit a watch rule in IBM Cognos Connection, you must have read and write permission to the **My Watch Items** page.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area options button , and click **My Watch Items**.
2. Click the **Rules** tab, and in the **Actions** column, click the set properties button for the watch rule you want to edit.
3. Use the **Set properties** page, **General** tab, to change the properties, such as name, language, or description for the watch rule.
4. Click the **Rules** tab to edit the rules properties, such as the conditional expression for the rule, the items to which the rule applies, and the alert type.

For more information on the rule properties, see “Watch Rules in Saved Reports” on page 94.

# Chapter 4. Access Permissions and Credentials

You use access permissions and credentials to secure your organization's data.

You can perform the following tasks:

- set access permissions for your organization's data, which specify the users who can have access to entries such as reports
- create trusted credentials to authorize other users to use your credentials when those users do not have sufficient access permissions to perform specific tasks
- manage your own data source credentials

## Set Access Permission for Entries

You can secure your organization's data by setting access permissions for the entries. You specify which users and groups have access to a specific report or other content in IBM Cognos software. You also specify the actions they can perform on the content.

When you set access permissions, you can reference both authentication provider users, groups, and roles and Cognos groups and roles. However, if you plan to deploy your application in the future, we recommend that you use only the Cognos groups and roles to set up access to entries in IBM Cognos software to simplify the process.

### Permissions and Permitted Actions

You can grant or deny the following access permissions.

| Permissions | Icons | Permitted Actions |
|---|---|---|
| Read | | View all the properties of an entry, including the report specification, report output, and so on, which are properties of a report. |
| | | Create a shortcut to an entry. |
| | | |
| Write | | Modify properties of an entry. |
| | | Delete an entry. |
| | | Create entries in a container, such as a package or a folder. |
| | | Modify the report specification for reports created in Report Studio and Query Studio. |
| | | Create new outputs for a report. |

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| Permissions | Icons | Permitted Actions |
|---|---|---|
| Execute | | Process an entry.<br><br>For entries such as reports, agents, and metrics, the user can run the entry.<br><br>For data sources, connections, and signons, the entries can be used to retrieve data from a data provider. The user cannot read the database information directly. The report server can access the database information on behalf of the user to process a request. IBM Cognos software verifies whether users have execute permissions for an entry before they can use the entry.<br><br>For credentials, users can permit someone else to use their credentials.<br>**Note:** Users must have execute permissions for the account they use with the run as the owner report option. |
| Set policy | | Read and modify the security settings for an entry. |
| Traverse | | View the contents of a container entry, such as a package or a folder, and view general properties of the container itself without full access to the content.<br>**Note:** Users can view the general properties of the entries for which they have any type of access. The general properties include name, description, creation date, and so on, which are common to all entries. |

## Access Permissions for Users

Users must have at least traverse permissions for the parent entries of the entries they want to access. The parent entries include container objects such as folders, packages, groups, roles, and namespaces.

Permissions for users are based on permissions set for individual user accounts and for the namespaces, groups, and roles to which the users belong. Permissions are also affected by the membership and ownership properties of the entry.

IBM Cognos software supports combined access permissions. When users who belong to more than one group log on, they have the combined permissions of all the groups to which they belong. This is important to remember, especially when you are denying access.

**Tip:** To ensure that a user or group can run reports from a package, but not open the package in an IBM Cognos studio, grant the user or group execute and traverse permissions on the package. Users also require read permissions on the package to launch studios.

## Access Permissions Required for Actions

To perform specific actions, each user, group, or role needs the right combination of access permissions granted for the entry, its parent entry, and its source and target entry. The following table lists permissions required for specific actions.

| Action | Permissions required |
|---|---|
| Add an entry | Write permissions for a parent entry |
| Query the entry properties | Read permissions for an entry |
| View the children of the entry | Traverse permissions for an entry |
| Update an entry | Write permissions for an entry |
| Delete an entry | Write permissions for an entry, and write permissions for a parent entry |
| Copy an entry | Read permissions for an entry and any child entries, traverse permissions for all of the children, and write and traverse permissions for the target parent entry |
| Move an entry | Read and write permissions for an entry, write permissions for both the source parent entry and the target parent entry, and traverse permissions for the target parent entry |

## Ownership of Entries

If the user is an owner of an entry, the user has full access rights for the entry. This ensures that users can always access and modify the entries they own. By default, the owner of the entry is the user who creates the entry. However, any other user who has set policy permissions for the entry can take ownership of the entry.

## Granted and Denied Access

You can grant access or deny access to entries. An icon that represents the type of access appears next to the entry name on the **Permissions** tab. For example, when a group has execute permissions for a report, this icon appears next to the group name on the **Permissions** tab for the report. When a group has execute permissions denied for a report, this icon appears next to the group name.

Denied access has precedence over granted access. When you deny specific users or groups access to an entry, you replace other security policies that grant access to the entry.

If the grant and deny permissions are in conflict, access to the entry is always denied. For example, a user belongs to two groups. One group has access granted to a report and the other group has access denied to the same report. Access to this report is denied for the user.

Deny access only when it is really required. Typically, it is a better administrative practice to grant permissions than to deny them.

### Parent/Child Permissions

Access permissions are acquired from parent entries. If access permissions are not defined, the entry acquires permissions from its parent entry. You can replace parent permissions by defining permissions for the child entry.

Objects that exist only as children of other objects always acquire permissions from their parents. Examples of such objects are report specifications and report outputs. They are visible through the Software Development Kit. You cannot set permissions specifically for those objects.

### Accessing Entries Associated with Data Sources Secured Against Multiple Namespaces

Data sources in IBM Cognos software can be secured against multiple namespaces. In some environments, the namespace used to secure the data source is not the primary namespace used for access to IBM Cognos Connection. When you try to access an entry, such as a report, a query, or an analysis, that is associated with a data source secured against multiple namespaces, and you are not logged on to all of the required namespaces, a prompt for authentication appears. You must log on to the namespace before you can access the entry.

When single signon (SSO) is enabled, the prompt for authentication does not appear. You are automatically logged on to the namespace.

This functionality applies to IBM Cognos Viewer only. If a similar situation occurs in an IBM Cognos studio, you must quit your task and log on to all the namespaces that you want to use in the current session.

## Set Access Permissions for an Entry

Setting access permissions for an entry includes creating new permissions or updating existing permissions. You can specify access permissions for all entries in IBM Cognos software. Some examples of such entries are reports, queries, analyses, packages, agents, metrics, namespaces, groups, users, or dispatchers. You can reference users, group and roles from different namespaces in a security policy for an entry.

If you plan to reference entries from multiple namespaces, log on to each namespace before you start setting access permissions. Otherwise, entries in namespaces to which you are not logged on are shown as **Unavailable**.

To administer security, you must have set policy permissions. For more information, see Chapter 4, “Access Permissions and Credentials,” on page 45.

### Procedure

1. In IBM Cognos software, locate the entry for which you want to set access permissions.

2. In the **Actions** column, click the set properties button for the entry.
3. In the **Set properties** page, click the **Permissions** tab.
4. Choose whether to use the permissions of the parent entry or specify permissions specifically for the entry:
   - To use the permissions of the parent entry, clear the **Override the access permissions acquired from the parent entry** check box, then click OK if you are prompted to use the parent permissions. Click **OK**.
   - To set access permissions for the entry, select the **Override the access permissions acquired from the parent entry** check box, then proceed to step 5.
5. If you want to remove an entry from the list, select its check box and click **Remove**.

   **Tip:** If you want to select all entries, select the check box at the top of the list in the upper-left corner. Clear the check box to deselect all entries.
6. To specify the entries for which you want to grant or deny access, click **Add**, then choose how to select entries:
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.
   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

     *namespace/group_name;namespace/role_name;namespace/user_name;*

     Here is an example:

     Cognos/Authors;LDAP/scarter;
7. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   **Tip:** To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.
8. For each entry in the list, in the box next to the list, select or clear check boxes to specify what type of access you want to grant or deny.
9. Click **Apply**.

   In the **Permissions** column, an icon appears next to the user, group, or role. This icon represents the type of access granted or denied to the entry.
10. If you want to remove access permissions that were previously set for the child entries so that the child entries can acquire permissions set for this entry, in the **Option** section, select the **Delete the access permissions of all child entries** check box.

    This option appears only with entries that are containers. You can use it to restrict access to a hierarchy of entries.

    **Warning:** Select this option only when you are certain that changing access permissions of the child entries is safe.
11. Click **OK**.

## Trusted Credentials

Trusted credentials are used for users who must perform a task or process, but do not have sufficient access permissions for entries that contain sensitive data, such as database signons and group memberships. Users with more extensive access permissions, who own the entries, can authorize a trusted user to use their credentials to access the entries.

Trusted credentials are also used to run scheduled requests when users are not logged on to IBM Cognos software, for example, overnight. When the request runs, a user session is created. The trusted credential is used to log on to IBM Cognos software as the user the trusted credential represents and the user's access permissions are used to run the report or the job.

The credentials are stored as part of the account object in the namespace.

### Create Trusted Credentials

You can create trusted credentials when you want to authorize other users to use your credentials when those users do not have sufficient access permissions to perform specific tasks.

#### Before you begin

For users to use trusted credentials, traverse permissions must be granted for the namespace.

#### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area options button , **My Preferences**.
2. On the **Personal** tab, under **Credentials**, if you have not created credentials before, click **Create the Credentials**.
3. Select the users, groups, or roles you want to authorize to use your credentials.

   If you are prompted for your credentials, provide your user ID and password.
4. If you want to add entries, click **Add** then choose how to select entries:
5. If you want to remove an entry from the list, select the check box next to it and click **Remove**.
6. Ensure that the list contains only the users, groups, or roles that you want, and click **OK**.

## Manage Your Own Data Source Credentials

It is important to manage data source credentials for your users because these credentials are required for certain tasks.

You may be prompted for your data source credentials when you perform the following actions:

- view, run, or open an entry (seeChapter 6, “Reports and Cubes,” on page 71)
- use a schedule or a job (seeChapter 12, “Schedule Management,” on page 165)

### Before you begin

If you are a user, your administrator must give you execute permissions for the **Manage own data source signons** capability and traverse permissions for its ancestors. You must also have read and traverse permissions on your account. You can then save credentials to your personal profile, as long as you do not have access to any predefined signons for the data source. You are not prompted for your credentials if you have permission to access an existing data source credential and you have saved the personal credential in your profile. You can view and delete your data source credentials from the **My Preferences** page.

To view another user's credentials, you must have read and traverse permissions on the user's account. To remove data source credentials, you must have read, write, and transverse permissions on the user's account.

## Save Data Source Credentials

You can save your data source credentials so that you are not prompted for them every time.

### Procedure

1. When you are prompted to enter your data source credentials, enter your user ID and password.
2. Select the **Remember my user ID and password when connecting to this data source** check box.
3. Click **OK**.

### Results

The next time you perform an action that requires those data source credentials, you are not prompted for them unless they have been removed or deleted, or have expired.

## View and Remove Your Data Source Credentials

You can view and delete your data source credentials.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click **My Area Options**, **My Preferences**.
2. Click the **Personal** tab.

   Your data source credentials are listed under **Data source credentials**. You can sort the list by **Data Source Name** or **Data Source Connection Name**.
3. To remove a data source credential, select the check box for it, then click **Remove**.

# Chapter 5. Pages and Dashboards

You can create dashboards in IBM Cognos Connection using pages and portlets.

This topic contains information about dashboards that use pages and portlets.

For information about IBM Cognos Business Insight workspaces, see Chapter 14, "IBM Cognos Business Insight," on page 185.

IBM Cognos Connection pages and dashboards provide quick access to IBM Cognos business intelligence and performance management information, such as reports, metrics, or news items. The information is relevant to specific users or business objectives, and can be monitored at a glance.

Dashboards are pages with enhanced functionality. The information is displayed on multiple tabs that are easy to navigate. Each tab can include different segment of information. A dashboard can be accessed as a standalone application through a URL. Users can print selected dashboard pages.

The content for pages and dashboards is provided by Cognos portlets, or other supported portlets. Each portlet is an independent application that adds to the page different content and functionality, such as the ability to browse folders and entries, view reports and metrics, and include custom text and images or links to other Web pages.

You can add different types of information to your pages and organize them in a way that is meaningful to you. For example, you may want to see specific IBM Cognos reports and metrics, or have links to your favorite Web sites.

The following table shows the types of content you can add to an IBM Cognos Connection page, and the portlets that provide this content.

| Page Content | Portlet | Portlet Group |
|---|---|---|
| Browse IBM Cognos folders, reports, and other entries | IBM Cognos Navigator | IBM Cognos Content |
| Search for IBM Cognos reports and other entries | IBM Cognos Search | |
| View and interact with IBM Cognos reports and other entries | IBM Cognos Viewer | |
| View and interact with different types of performance metrics, such as the metrics you want to monitor closely, or the metrics for which you are directly responsible. | IBM Cognos Metric List | IBM Cognos Metric Studio |

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| Page Content | Portlet | Portlet Group |
|---|---|---|
| Add a metric history chart that illustrates the historical performance of the metric | IBM Cognos History Chart | |
| Display an impact diagram associated with a metric | IBM Cognos Impact Diagram | |
| Display a custom diagram associated with a scorecard. | IBM Cognos Custom Diagram | |
| View and interact with custom applications created using IBM Cognos Software Development Kit | IBM Cognos Extended Applications | IBM Cognos Extended Applications Portlet |
| Register and show active links to other Web pages | Bookmarks Viewer | IBM Cognos Utility |
| Add and view custom images, such as logos | Image Viewer | |
| Insert any other Web page | HTML Viewer | |
| Add and show the content of a Real Simple Syndication (RSS) news feed specified by a URL address | RSS Viewer | |
| Add and view custom text and images | HTML Source | |
| Create and view a dashboard with multiple tabs | Multi-page | Dashboard |
| Add non-Cognos items to a page | Supported other portlets | Content associated with other portlets |

## Before you begin

The list of pages is cached in an IBM Cognos Connection session. When the state of a page changes during the current session, users who have access to the page are affected. For example, when a page is disabled or deleted, it can no longer be used and its tabs are deleted or not functional. To update the portal with the most current settings, use the IBM Cognos Connection refresh button .

When you log on to IBM Cognos Connection for the first time, you access the pages an administrator made available to you. Later, you can create your own pages.

## Create a Page

You can create your own pages in IBM Cognos Connection to group different types of information into a single view.

The pages are saved in Public Folders or My Folders. If you plan to share a page with other users, save it in Public Folders.

After you create the page, you can edit it to modify its contents, layout and style, and to set access permissions. For more information, see “Share a Page” on page 56.

You can delete pages in IBM Cognos Connection “Delete an Entry” on page 33 if you have the required access permissions for the pages. Deleting a page may affect your portal tabs. For more information, see “Portal Tabs” on page 58.

### Procedure

1. In IBM Cognos Connection, click the new page button .
2. Specify a name and location for the page, and, if you want, a description and a screen tip.
3. Click **Next**.

   The **Set columns and layout** page appears.
4. Define the layout for your page by setting the number and width of columns.

   **Tip:** If you are using multiple columns and one of the columns includes a report that is shown in IBM Cognos Viewer, set the width to at least 50% to minimize scrolling.
5. In the column to which you want to add portlets, click **Add**.
6. Click the portlet group that contains the portlets you want to add.
7. Select the portlets, and click the add button to move them to the **Selected entries** box. If you want to remove a portlet from the **Selected entries** box, click **Remove**.

   **Tip:** You can preview the content of the portlets by clicking the view this portlet button .
8. Click **OK**.
9. Repeat steps 5 to 8 for each portlet group you want.
10. Click **OK**, and then click **Next**.

    The **Set page style** page appears.
11. Customize the appearance of your page.
    - If you want, add a title and instructions for the page in the language of the product.

      For more information, see “Edit a Page” on page 56.

      To hide the title or instructions, select the associated check box.

      **Tip:** To change the formatting of the text, click **Custom**. To go back to the default formatting, click **Return to default**.
    - If you want, hide the portlet borders, title bars, or the edit button in the title bar. This helps to avoid clutter and gives the page a uniform look and feel.
12. Click **Next**.

13. If you want to add the page to the portal tab bar, select the **Add this page to the portal tabs** check box. To view the page, select the **View the page** check box.
14. Click **Finish**.

## Edit a Page

You can change the page content, layout and style, and access permissions. For example, you may want to see a different report, or change the list of users who can access the page.

When you create a page, you can specify a title and instructions for the page only in the product language you currently use. For example, if you use the French version of IBM Cognos software, you can type the title and instructions in French only. After the page is created, you can add the title and instructions for other language versions by editing the page properties on the **Page Style** tab.

### Procedure

1. Go to the page you want to edit.
2. Click the edit page button .

   **Tip:** Alternatively, locate the page in IBM Cognos Connection, and click its set properties button.
3. Change the page properties as required.

   For more information about changing the page content, layout, and style, see "Create a Page" on page 55.

   For more information about setting the page access permissions, see "Share a Page."

## Share a Page

You can share your page with other users by giving them access permissions for the page. You can set up the permissions so that other users can only view the page or also modify it.

To view a page, traverse and execute permissions for the page, and execute permissions for its portlets are required. To modify the page, write permissions are also required.

### Procedure

1. If you did not create the page in Public Folders, copy it there from your personal folders "Copy an Entry" on page 27.
2. Specify which users, groups, or roles can have read, traverse, execute, or write permissions for the page.

   For more information, see Chapter 4, "Access Permissions and Credentials," on page 45

## Modify a Portlet

Portlets provide different types of information for pages.

You can modify the content of an instance of a portlet in a page if you have the required permissions for the page. For more information, see "Share a Page" on page 56. You will retain the custom settings even if the administrator resets the portlet. Other users who also have access to the page that contains this portlet instance will also see the changes. However, if the administrator locks the portlet, you cannot configure it.

The configurable properties for the Cognos portlets vary. For more information, click the help button in the portlet title bar.

### Procedure

1. Go to the page that contains the portlet.
2. In the portlet title bar, click the edit button .
3. Edit the properties as required.

   **Tip:** If you want to go back to the default settings, click the reset button.
4. Click **OK**.

## Enable Communication Between Cognos Portlets

You can enable portlet-to-portlet communication so that the portlets can interact. For example, you can use this functionality when you want to navigate published IBM Cognos reports and view the selected reports on the same page.

This functionality applies only to Cognos portlets and works between portlets of different groups. For example, the IBM Cognos Metric List portlet can communicate with the IBM Cognos Viewer portlet. One portlet is a target portlet, and the remaining portlets are source portlets. The results of actions in the source portlets are shown in the associated target portlets.

Portlets in different pages can communicate between themselves.

You can enable portlet-to-portlet communication between the following source and target portlets.

| Source portlet | Target portlet |
|---|---|
| IBM Cognos Navigator | IBM Cognos Viewer |
| IBM Cognos Search | IBM Cognos Viewer |
| IBM Cognos Viewer | IBM Cognos Viewer |
| IBM Cognos Metric List | IBM Cognos Viewer<br>IBM Cognos History Chart<br>IBM Cognos Impact Diagram |
| IBM Cognos Impact Diagram | IBM Cognos Viewer<br>IBM Cognos History Chart |

| Source portlet | Target portlet |
| --- | --- |
| IBM Cognos Custom Diagram | IBM Cognos Viewer<br>IBM Cognos Metric List<br>IBM Cognos History Chart |
| Bookmarks Viewer | HTML Viewer |
| Image Viewer | HTML Viewer |
| RSS Viewer | HTML Viewer |

To enable this functionality, you specify a channel name in the target portlet and refer to this name in the associated source portlets.

### Procedure

1. Go to the page or the dashboard that contains the portlets for which you want to enable portlet-to-portlet communication.
2. Click the edit button in the portlet title bar.
3. For the channel property, type the name you want.

   The name can contain letters, numbers, and underscore (_) characters, but must not contain any spaces. For example, Cognos, Cognos_Portlets, CognosPortlets are valid names.

   **Note:** The boxes where you type the channel name have different labels in different portlets. For example, **Channel**, **Portlets using channel**, or **In a destination portlet**.
4. Click **OK**.
5. Repeat the steps for each portlet that you want to broadcast on the same channel.

   Ensure that you type the same channel name.

## Portal Tabs

The tabs in IBM Cognos Connection are used to quickly access the pages that are important to you.

The tabs represent:

- Public Folders
- My Folders
- Pages or dashboards

An administrator specifies the default tab setup for users. To personalize IBM Cognos Connection, you can add and remove tabs, or reorder them. Other users are not affected by your changes.

When you delete a page, the tab associated with this page is automatically removed. Your tabs may also be affected by changes to the associated pages made by other users who have access to the pages. For example, when a page is deleted

during the current session, its tab is no longer functional, and an error message may appear when you click the tab. To see the most current tab settings, click the IBM Cognos Connection refresh button .

**Note:** If many tabs exist, scrolling is added automatically.

## Add a Tab

You can add a tab in IBM Cognos Connection for a new page or for an existing page so that you can access the page quickly.

If the Public Folders or My Folders tabs are not available in your tab bar, you can add them, too. Only one tab can exist for each folder or page.

There are various methods to add a tab. Choose the method that is applicable to your current view.

### Using My Preferences

The procedure for using My Preferences to add a tab is as follows.

#### Procedure

1. Click the my area button , **My Preferences**, and then click the **Portal Tabs** tab.

   A list of your current tabs appears.
2. Click **Add**.
3. In the list of available pages, select the page you want.

   You can select multiple pages.
4. Click the right arrow button to move the page to the **Selected entries** box.
5. Click **OK**.

   The tab for the page appears in the portal.
6. Click **OK** to close **My Preferences**.

### Using the Tab Menu

The procedure for using the Tab Menu to add a tab is as follows.

#### Procedure

1. From the tab menu on the left side of the tab bar, click **Add tabs**.
2. In the list of available pages, select the page you want.

   You can select multiple pages.
3. Click the right arrow button to move the page to the **Selected entries** box.
4. Click **OK**.

   The tab for the page appears in the portal.

### Using the Add Button

The procedure for using the Add Button to add a tab is as follows.

### Procedure

1. In the list of available pages, locate the page you want.
2. In the **Actions** column, click its associated add button .

   The tab appears in the portal.

## Delete a Tab

You can delete a tab when it is not needed.

When you delete a page that has a tab, the tab is automatically removed. When you remove a tab for a page, the page is not deleted.

You can delete the Public Folders and My Folders tabs, and add them back later, if needed. For more information, see "Add a Tab" on page 59. Deleting the tabs does not delete Public Folders and My Folders from Content Manager.

### Using My Preferences

The procedure for using My Preferences to delete a tab is as follows.

#### Procedure

1. Click the may area button , **My Preferences**, and then click the **Portal Tabs** tab.

   A list of your current tabs appears.
2. Select the check box next to the tab you want to remove, and click **Remove this tab**.

   You can select multiple tabs.
3. Click **OK**.

   The tab is deleted from the tab bar.

### Using the Tab Menu

The procedure for using the Tab Menu to delete a tab is as follows.

#### Procedure

1. On the tab bar, click the tab you want to remove.
2. From the tab menu , on the left side of the tab bar, click **Remove this portal tab**.
3. In the message box, ensure you are deleting the proper tab, and click **OK**.

   The tab is deleted from the tab bar.

## Reorder the Tabs

You can change the order of tabs so that they are organized in a way that is meaningful to you.

### Using My Preferences

The procedure for using My Preferences to reorder the tabs is as follows.

### Procedure

1. Click the may area button , **My Preferences**, and then click the **Portal Tabs** tab.

   A list of your current tabs appears.
2. Click **Modify the sequence**.
3. In the **Tabs** box, move the tabs up or down as required.
4. Click **OK**.

   The tabs appear in the new order.
5. Click **OK** to close **My Preferences**.

### Using the Tab Menu

The procedure for using the Tab Menu to reorder the tabs is as follows.

### Procedure

1. From the tab menu on the left side of the tab bar, click **Modify the sequence of tabs**.

   A list of your current tabs appears.
2. Move the tabs up or down using the appropriate buttons.
3. Click **OK**.

   The tabs appear in the new order.

## Change Your Home Page

You can choose any page in IBM Cognos Business Intelligence as your home page.

### Procedure

1. Go to the page you want to set up as your new home page.
2. Next to the home icon , click the arrow, and click **Set as Home Page**.

## Create a Dashboard with Multiple Tabs

A dashboard is a visual display of the most important information that a user needs. The information is consolidated and arranged on a single screen so that it can be monitored at a glance.

Different segments of information are displayed on different tabs. To create a dashboard, you assemble the different segments of information into a single view by using the Multi-page portlet. For more information, see Chapter 5, “Pages and Dashboards,” on page 53. This portlet is linked to a source folder that contains entries that appear as tabs in the dashboard. You can make changes to the tabs in the dashboard by adding or deleting the associated entries from the source folder.

The following entries can be used as tabs in a dashboard:

- folders and shortcuts to folders

  Use folders to include a second level of tabs.
- packages and shortcuts to packages

  Use packages to include a second level of tabs.
- reports and shortcuts to reports

Use to view or run a Report Studio report.

- report views and shortcuts to report views

  Use to view or run a Report Studio report.
- queries and shortcuts to queries

  Use to view or run a Query Studio report.
- analysis and shortcuts to analysis

  Use to view or run an Analysis Studio report.
- pages and shortcuts to pages

  Use to add a page or another dashboard
- URLs and shortcuts to URLs

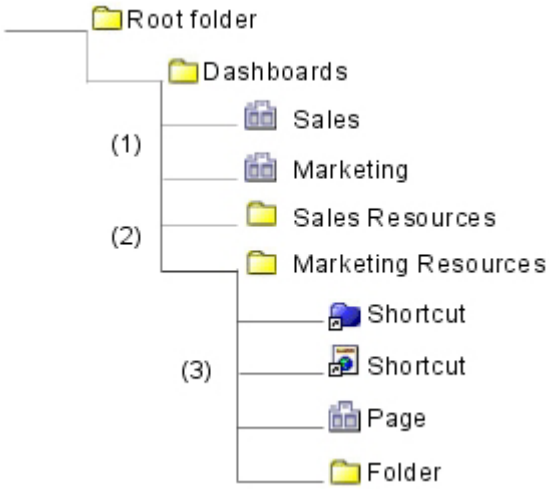
  Use to embed a different Web page.
- PowerPlay reports

  Use to view or run a PowerPlay report
- Microsoft Documents

  Use to include a link to a Microsoft document, such as an Excel, PowerPoint, or Word document.

The general dashboard properties are the same as page properties. You can edit the dashboard layout and style "Edit a Page" on page 56, modify the properties of the Multi-page portlet "Modify a Portlet" on page 56, set up access permissions for the dashboard "Share a Page" on page 56, and add it to the portal tabs "Portal Tabs" on page 58.

Before you start creating your dashboards, we recommend setting up a folder hierarchy in Public Folders to keep your dashboard resources organized. For example, create a folder for all the dashboards you plan to create. Next, create a subfolder for each dashboard to use as source folder for the entries that you want to include in the dashboard, such as reports, folders, pages, or shortcuts. The folder structure may look like this:




1. The Sales and Marketing pages are the multi-tabbed dashboards. These are the dashboard master pages that are built using the Multi-page portlet.
2. The Sales Resources folder is the source folder for the Sales dashboard, and the Marketing Resources folder is the source folder for the Marketing dashboard.
3. The source folders can contain entries such as reports, pages, folders, shortcuts, and so on. These entries appear as tabs in the dashboard.

## Procedure

1. In IBM Cognos Connection, click the new page button .
2. Type the name, and select a location for your page.
3. Click **Next**.
4. In the **Set columns and layout** page, set the number of columns to 1, and the column width to 100%.
5. Click **Add**.

   A list of portlet groups appears.
6. In the **Available Entries** box, click **Dashboard**.
7. Select the **Multi-page** portlet, and click the right arrow button to move the portlet to the **Selected Entries** box.
8. Click **OK**, and then **Next**.
9. In the **Set page style** page, specify a meaningful title for the page, select any of the remaining properties, and click **Next**.
10. In the **Select an action** page, you can select **Add this page to the portal tabs**.
11. Click **Finish**.

    The page that you created is the dashboard master page.
12. Open the page you created.

    An empty frame of the Multi-page portlet appears.
13. In the portlet toolbar, click the edit button .

    The portlet properties page appears.
14. In the **Folder** section, click **Select an entry**.
15. Browse to the folder or package that contains the resources for the dashboard, such as shortcuts, pages, or bookmarks. Select an entry, and click **OK**.

**Tip:** To add My Folders as a tab in the dashboard, create a shortcut to My Folders.

16. Specify other portlet properties as required. For example, in the **Display Style** section, specify how to display the dashboard tabs, horizontally at the top of the page, or vertically on the left side of the page.
17. Click **OK**.

### Results

You can now open and view the dashboard page.

**Tip:** Other users can access the dashboard through its URL. To see the URL, go to IBM Cognos Connection, locate the dashboard master page, and open its properties page. On the **General** tab, click **View the search path, ID and URL**.

## Implement global filters in multi-tabbed dashboards

Global filters that are added to a multi-tabbed dashboard allow reports located on multiple pages in a dashboard to be filtered using a report prompt.

### About this task

To add global filters across multiple pages in a multi-tabbed dashboard, there are additional steps that must be completed when creating the dashboard. These steps are described here. For more detailed information about adding global filters, see the proven practices document IBM Cognos BI - Global Filters for a Multi-Page Dashboard.

### Procedure

1. Add each report that you want filtered to a Cognos Viewer portlet within a page. If you want one report per tab in the multi-tabbed dashboard, you must create one page per report. If more than one report is displayed on a tab, add multiple Cognos Viewer portlets to the page, one for each required report.
2. After adding the reports, set the Portlet communication options in each of the Cognos Viewer properties to use a common channel name.
3. Place all the pages that you require for the tabs in the dashboard in one folder.
4. Create a dashboard master page that contains a Cognos Viewer portlet for the prompt report and a multi-page portlet for the tabs. For the Cognos Viewer portlet, specify the same channel name as for the other Cognos Viewer portlets and have the multi-page portlet point to the folder containing the report pages that you created.

# Adding Interactivity to Pages and Dashboards

Pages and dashboards become much more effective for data reporting and analysis when you add interactivity to them. A single action in one report can cause other reports to refresh simultaneously and show the data associated with the action.

You can enhance the page interactivity by

- defining global filters
- enabling the sharing of drill-up and drill-down actions
- enabling the sharing of drill-through actions

## Defining Global Filters

Global filters are used to control the display of one or more reports in a single portal page or in a dashboard. For example, a global filter can be on a report that contains only a prompt or prompt controls. This allows for a single selection to drive a number of reports at once. When a prompt answer is changed, all related reports refresh dynamically to show the data that answers the prompt. For example, if you answer a prompt for a country or region with Brazil, all related reports on the page are filtered to show the data for Brazil. When this is used in a dashboard, the context is passed to all corresponding tabs.

### Procedure

1. Prepare the Reports
2. Create the Global Filters
3. Assemble the Reports on a Page

### Preparing the Reports

Before you start creating a page or a dashboard with global filters, you must know which reports you can use, and have the reports ready. The reports can be authored in Report Studio, Query Studio, or Analysis Studio.

For reports in a package, the global filters share parameters using the model item.

### Create the Global Filters

A global filter is a value that is shared across different reports. At least one of the reports that you are using for the dashboard needs to contain a prompt or prompt control. The prompted report is embedded into a page or a dashboard using the IBM Cognos Viewer portlet and linked with other reports in the page using the global filter portlet properties. The prompts that are used as global filters control the display of your chosen linked reports. If this functionality is implemented in a single page, the prompts control linked reports in different sections of the page.

If the page is a dashboard with multiple tabs, the prompts can control the report filtering across tabs. Note that there is a limitation with filtering across tabs for IBM Cognos Viewer portlets. For prompts to control report filtering, the IBM Cognos Viewer portlet must exist as a sibling on the same page as the Multi-page portlet.

We recommend creating prompt reports in Report Studio. The rich editing environment of this studio gives the author access to a variety of prompt controls, such as the **Next**, **Reprompt**, or **Finish** buttons. These controls add more interactivity to portal pages.

For more information about building prompts and prompt pages, see the IBM Cognos Report Studio *User Guide*.

### Procedure

1. In Report Studio, create a prompt on a report page, not on a prompt page, of the report.

   Set the **Auto-Submit** property for the prompt to **yes**.

   If you want to use cascading prompts, only the last prompt in the sequence needs to be on the report page.

   For some prompts, such as the value prompts, you may need to add a **Finish** button to signal that the prompt selection is complete. For cascading prompts, the **Reprompt** button is also required to restart the prompting sequence.

2. Add other details, such as background images, instructions, or a title.

### Results

The prompt can now be added to a portal page or a dashboard. For more information, see "Assemble the Reports on a Page."

**Using Metrics as Global Filters:**

You can use metrics and strategy elements in IBM Cognos Metric Studio portlets as global filters. In a page, or in a dashboard with multiple tabs, the IBM Cognos Metric List, IBM Cognos Impact Diagram, and IBM Cognos Custom Diagram portlets can filter prompted parameters for the IBM Cognos Viewer portlet. You must configure IBM Cognos Viewer to show a report associated with a metric or a strategy element, and set up communication between the portlets using the same channel name.

For more information, see "Enable Communication Between Cognos Portlets" on page 57.

When a user clicks a metric name in IBM Cognos Metric List, IBM Cognos Impact Diagram, or IBM Cognos Custom Diagram, IBM Cognos Viewer dynamically updates the report if the report prompt parameters are based on metric values. When a user clicks a strategy element in IBM Cognos Custom Diagram, IBM Cognos Viewer dynamically updates the report if the report prompt parameters are based on strategy element values.

For this functionality to work, the following parameters that are broadcast on a channel after a click action in an IBM Cognos Metric Studio portlet must match the names of the report prompt parameters:

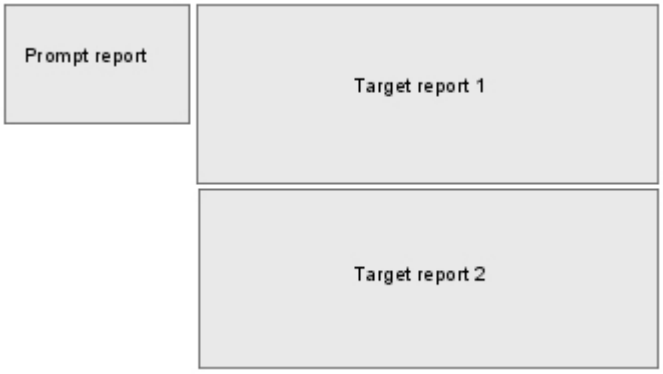
- `scorecard_extid`
- `scorecard_sid`
- `strategy_sid`
- `metric_sid`
- `metric_extid`
- `time_period_sid`

## Assemble the Reports on a Page

The prompts and the target reports in a page or a dashboard create an interactive and easy way to access IBM Cognos Business Intelligence environment.

Each report is displayed using the IBM Cognos Viewer portlet. The reports communicate with each other using the properties of this portlet.

You can use different design strategies to implement global filters in a page. Here is an example of a basic layout:




Use the following steps when defining global filters in a single page. If you want to implement this functionality in a dashboard, you must complete additional steps. For more information, see "Create a Dashboard with Multiple Tabs" on page 61.

## Procedure

1. In IBM Cognos Connection, click the new page button .
2. Type the name, and select a location for your page.
3. Click **Next**.
4. In the **Set columns and layout** page, set the number and width of columns.

   For example, the reports that display the prompts and prompt controls can be placed in one column, and the target reports in a separate column to the right.
5. Click **Add** at the bottom of the first column.
6. In the **Available Entries** box, click **IBM Cognos Content**.
7. Select the **IBM Cognos Viewer** portlet, click the right arrow button to move the portlet to the **Selected Entries** box, and click **OK**.
8. Repeat steps 5 to 7 for each column.

   You must add the IBM Cognos Viewer portlet for each report that you want to include in the column. For example, if the column on the left will contain a prompt and prompt controls, add two IBM Cognos Viewer portlets.
9. Click **Next**.
10. Complete the remaining steps in the wizard, if needed, and click **Finish**.

    For more information, see the steps in the section "Create a Page" on page 55.
11. Go to the folder where you saved the new page, and open it.

    In the page columns, you can see the empty frames of the IBM Cognos Viewer portlets.
12. For any portlet in the page, click the edit button in the portlet toolbar.
13. In the portlet properties page, click **Select an entry** to select the report you want to display in the portlet.
14. Click **Report Properties**.

    The **Set the properties page** appears.
15. For the **Fragment Action** property, specify the default portlet action when the portlet is invoked in a page.

You can choose to show the run icon, run the report, or view the most recent saved output.

**Tip:** For more information about the portlet properties, click the **Help** button in the portlet.

16. For the **Prompt the user** property, specify how to execute the prompts.
    - When you select **Every time**, if the report contains optional or required prompts, the user is prompted to enter the prompt values before the report is run.
    - When you select **Only when required parameter values are missing**, the user is prompted if the report contains required prompts and the values are missing. Otherwise the report runs successfully.
    - When you select **Never and show the report only when required values are provided**, IBM Cognos Viewer attempts to run the report, but the page remains hidden until the required prompt values are provided.
    - When you select **Based on the prompt settings of the report**, IBM Cognos Viewer uses the prompts specified in the report.
17. For the **Prompt values** property, select the **Communicate with other portlets** check box.

    This property enables communication between this portlet and other portlets in the page that have this property set up.
18. If you want to set up communication between only specific portlets in the page, type the channel name in the box provided.

    Only the portlets that share the same channel name can interact. By specifying the channel name, you have more control over the page. For example, you can link only the reports that have matching parameters.

    For more information about this property, click the **Help** button in the portlet.
19. If you selected the **Communicate with other portlets** check box, you can specify how global prompts are matched. Select either **Parameter name or data item** or **Parameter name only**.

    Typically, prompt values are matched using the parameter name only. However, for date and time prompts, such as From and To, using the parameter name may not work because the parameter names are using the same data item, for example, Order date. In these situations, use the **Parameter name or data item** option to get the correct results in your reports.
20. If you want to see the portlet toolbar in the page, for the **Show Toolbar** property, select the **Normal mode** and **Maximize mode** check boxes.
21. Click **OK** to close the **Set the properties** page, and click **OK** again to close the general properties page.
22. Repeat steps 12 to 20 for each portlet in the page.

## Enable Sharing of Drill-up and Drill-down Actions

In pages, you can enable sharing of drill-up and drill-down actions, between reports that are based on a dimensionally modelled data source. A drill action on an item in one report causes the same action in an associated report if the report is on the same page and contains the same item. For example, when you drill down on the item 2005 in one report, all reports in the page drill down on the same item and the data for the year 2005 appears in all reports.

This functionality is enabled using the properties of the IBM Cognos Viewer portlet. By default, drill actions are disabled in a page.

This functionality is not supported for dashboards with multiple tabs. However, a single page with drill-up and drill-down actions enabled can be embedded into a dashboard as one of the tabs.

### Procedure

1. In IBM Cognos Connection, create a page that contains the IBM Cognos Viewer portlet for each report that you want to add to the page.

   For more detailed information, see the steps in "Create a Page" on page 55.
2. Configure the IBM Cognos Viewer portlets to display the reports that you want to add to the page.

   In the portlet properties page, click **Select an entry** to select the report you want to display in the portlet.
3. In the **Set the properties** page of the IBM Cognos Viewer portlets, for the **Drill down and drill up** property, select the **Communicate with other portlets on the page** check box.

   This property enables communication between all portlets in the page using the default channel.

   For more information, click the **Help** button in the portlet.
4. If you want to set up communication between only specific portlets in the page, type the channel name in the box provided.

   Only the portlets that share the same channel name can interact. By specifying the channel name, you have more control over the page.

## Enable Sharing of Drill-through Actions

You can enable sharing of drill-through actions in a page. When a user drills from a source report to a target report, the target report appears in the specified area of the page.

For this feature to work, a page must have a report that contains an authored drill-through path. The page must also contain a placeholder IBM Cognos Viewer portlet that is set up to receive the drill-through requests.

Report-based drill-through works with both interactive reports and saved report outputs. However, it only works for a single drill-through request. If the drill-through contains multiple targets, it must be invoked from the context menu.

This functionality is enabled using the **Channel** property of the IBM Cognos Viewer portlet. You must specify the same channel name for the portlet that contains the source report and the portlet that receives the target report. By default, drill-through actions are disabled in a page.

This functionality is not supported for dashboards with multiple tabs. However, a single page with drill-through actions enabled can be embedded into a dashboard as one of the tabs.

### Procedure

1. In IBM Cognos Connection, create a page that contains the IBM Cognos Viewer portlets for the drill-through source report, and the target report.

   For more detailed information, see the steps in the section "Create a Page" on page 55.
2. Configure one of the IBM Cognos Viewer portlets to display the Report Studio source report that contains the drill-through path.

In the portlet properties page, click **Select an entry** to select the report you want to display in the portlet.

3. Configure the other IBM Cognos Viewer portlet to display the drill-through target report.

   As the target report, we recommend using a report that contains prompts.

   In the portlet properties page, click **Select an entry** to select the report you want to display in the portlet.

4. For both portlets configured in step 2 and 3, in the **Set the properties** page, for the **Report-based drill-through** property, select the **Communicate with other portlets on the page** check box, and type the channel name in the box provided.

   The channel name is mandatory.

   For more information about this property, click the **Help** button in the portlet.

# Chapter 6. Reports and Cubes

You can use reports, cubes, and documents to analyze data and help you make informed and timely decisions.

In IBM Cognos Business Intelligence, reports and cubes can be published to the portal to ensure that everyone in your organization has accurate and relevant information when they need it.

## Query Studio and Report Studio Reports

Typically, for Query Studio and Report Studio reports, your data modeler creates models from subsets of corporate data. These models are then published as packages in IBM Cognos BI. Your administrator can also create packages based on relevant data sources and you can create packages in IBM Cognos Connection. For more information about packages, see Chapter 7, “Packages,” on page 111.

Query Studio and Report Studio users can create reports based on the packages and publish them in IBM Cognos BI. In IBM Cognos Connection, a Query Studio report is called a query and a Report Studio report is called a report.

OLAP sources do not need additional modeling.

## Analysis Studio Reports and Cubes

An Analysis Studio administrator can publish Analysis Studio reports and cubes in IBM Cognos BI. Analysis Studio users can create reports and publish them in IBM Cognos BI. In IBM Cognos Connection, an Analysis Studio report is called an analysis.

## Working with Reports and Cubes

A report can refer to the specification that defines the information to include in a report, or the results themselves. For Report Studio and Query Studio, report specifications can have saved results or you can run a report to produce new results. For Analysis Studio, reports are always run against the latest data in the cube.

After a report is published to the portal, you can view, run, or open it or view report output versions. You can also view the report in various formats.

You can distribute reports by saving them, sending them by email, sending them to your mobile device, printing them, or bursting them. You can also set run options for the current run, and set advanced run options for the current run.

You can create an ad hoc report using Query Studio or you can use Report Studio to define layouts, styles, and prompts for your report. You can also create Analysis Studio reports (analyses).

You can schedule a report to run at a later time or on a recurring basis. You can schedule a report as part of a job or based on a trigger. You can view the run

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history for a report. For more information, see “View the Run History for Entries” on page 181. You can also include a report in an agent Chapter 9, “Agents,” on page 141.

You can add yourself to the alert list for a report so that you are alerted when new versions of the report are created. You can also specify watch rules in saved HTML report output so that you are alerted whenever the events specified by the watch rules are satisfied.

You can disable selection-based features, such as drilling up and down and drill-through.

### Mixed Currencies

Mixed currency values occur when you calculate values with different currencies. When using an OLAP data source, mixed currency values use the asterisk character (*) as the unit of measure.

### Accessibility for the Disabled

We are committed to assisting people with disabilities, and promotes initiatives that make workplaces and technologies accessible. IBM Cognos BI provides an accessible report reading solution. This solution allows disabled users and users of Assistive Technology the ability to access and display reports in IBM Cognos Viewer.

### Series 7 Reports and Cubes

For information on working with Series 7 reports and cubes in IBM Cognos BI, see “Series 7 Reports in IBM Cognos Connection” on page 107.

## IBM Cognos Active Reports

You can use IBM Cognos Report Studio to create active reports. IBM Cognos Active Report is a report output type that provides a highly interactive and easy-to-use managed report. Active reports are built for business users, allowing them to explore their data and derive additional insight.

Active reports make business intelligence easier for the casual user. Report authors build reports targeted at their users' needs, keeping the user experience simple and engaging. Active reports can be consumed by users who are offline, making them an ideal solution for remote users such as the sales force.

Active reports are an extension of the traditional IBM Cognos report. You can leverage existing reports and convert them to active reports by adding interactive behavior, providing end users with an easy-to-consume interface.

Like existing IBM Cognos reports, you can execute active reports from IBM Cognos Connection as well as schedule and burst them to users.

For more information, see the *Report Studio User Guide*.

## View, Run, or Open a Report

You can view the most recent run of a report, run a report, or open a report in the authoring tool.

The default action is to view the most recent run of a report but you can select the default action that you prefer.

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

### Before you begin

You must have execute permission to run a report. You must have read and traverse permissions for the folder that contains the report.

You may be requested to enter your data source credentials. For information on data source credentials, see "Trusted Credentials" on page 50.

### Procedure

1. Open IBM Cognos Connection.
2. Click the report that you want.

   For more information about using PowerPlay Web Explorer, see PowerPlay Web *User Guide*.

   For information about using Analysis Studio, see the Analysis Studio *User Guide*.

## Set Default Report Options

You can set certain actions as the default when a report is run.

The default report actions are

- view the most recent report or run if it has not been previously run (default)
- run the report
- open the report in the authoring tool that was used to create it (Query Studio, Report Studio, or Analysis Studio)

You can set default report options such as format and language. You can also set the default to prompt for values and run as the owner. For information about properties, see "Entry Properties" on page 19.

### Before you begin

You must have execute permissions for the report. You must have read and traverse permissions for the folder that contains the report.

### Procedure

1. In IBM Cognos Connection, click the set properties button on the actions toolbar to the right of the report.
2. Click the **Report** tab for a Report Studio report, the **Query** tab for a Query Studio report, or the **Analysis** tab for a Analysis Studio report.
3. Under **Default action**, select the default action for when the report is run.
4. If you want to override report options, under **Report options**, click the **Override the default values** check box.

   You can change some or all of the options, such as format, language, and accessibility support.

5. If you want to prompt for values to filter the data in the report, click select the **Prompt for values** check box under **Prompt Values**.

   **Note:** You are prompted for values only if the report specification or model includes prompts or if you have access to multiple data source connections or signons.
6. If you want to run the report using the owner credentials, click the check box next to the owner listed under **Run as the owner**. Click **Capabilities only** to run the report using only the owner capabilities and not the owner credentials. For more information, see "Running reports with report owner capabilities" on page 77.
7. To set additional report options, click **Advanced options**.
   - Under **Number of rows per Web page in HTML reports**, click the number of rows you want to allow.
   - To allow such features as drill up and drill down, drill through, IBM Cognos Search, watch rules, and agent notification when the report is viewed in IBM Cognos Viewer, select **Enable selection-based interactivity in HTML reports**.
   - If you want to allow the creation of additional output formats so that watch rules can be evaluated and saved output versions can be imported into IBM Cognos for Microsoft Office, select **Enable enhanced user features in saved output versions**.
   - If you want users to receive alerts when new report output is generated, select **Enable alerts about new versions**.
   - To create an expiry date for the report cache data, select Day or Month and type a corresponding number under Cache duration. Report cache data is created only if there is no cache data or if the cache data is expired.
8. Click **OK**.

## Set Report Options for the Current Run

You can set certain options for the current run of a report.

The options include:

- report output format "Report Formats" on page 83
- language "Report Languages" on page 85
- delivery method "Distributing Reports" on page 101
- prompt for values "Specify the Default Prompt Values for a Report" on page 86

These options override the defaults for a report for a one-time run.

**Tip:** You can also force database access by clicking **More** next to the report, and then clicking **Clear the cache**.

You can change default run options for reports.

If you change the delivery method while a report is running, the run operation is canceled. The report is run again using the new delivery method that you select. This can be time-consuming for large reports. To save time, specify the delivery method before you run the report.

To specify a time for the report to run, to choose additional formats or more than one language, or for additional delivery methods, use advanced run options.

### Before you begin

You must have execute permissions for the report you are attempting to run. You must have read and traverse permissions for the folder that contains the report.

### Procedure

1. In IBM Cognos Connection, click the run with options button on the actions toolbar to the right of the report you want to run.
2. Under **Format**, click the format that you want for the report output.
3. Under **Accessibility**, select **Enable accessibility support** to create accessible report output.
4. Under **Language**, click the language that you want for the report output.
5. Under **Delivery**, choose to view the report now, save the report, print the report, or send the report your mobile device.
6. If you choose to print, click **Select a printer**, click the button next to the printer you want to use, and click **OK**. If the printer is not listed, you can type the printer information.
7. If you want to prompt for values to filter the data in the report, under **Prompt Values**, click the **Prompt for values** check box.

   You are prompted for values only if the report specification or model includes prompts or if you have access to multiple data source connections or signons.
8. Click **Run**.

## Set Advanced Report Options for the Current Run

You can specify advanced run options for a report for the current run.

The advanced run options for a report include the following:

- time when the report should run
- multiple report output formats if you choose to run the report later and additional format choices for HTML and PDF“Report Formats” on page 83
- one or more languages “Report Languages” on page 85
- accessibility support “Enabling Accessible Report Output” on page 88
- one or more delivery methods “Distributing Reports” on page 101
- prompt for values “Specify the Default Prompt Values for a Report” on page 86
- burst the report “Distributing Reports” on page 101

The report runs in the background if you run the report later, select multiple report formats or languages, select to save, print or email the report, send the report to your mobile device, or burst the report. If you set your preferences to show a summary of the run options “Personalize the Portal” on page 38, the summary appears whenever the report is not run interactively.

The report runs in the background. When done, the output versions button appears next to the report on the **Actions** toolbar.

**Tip:** Click the output versions button to view the selected formats. For more information, see “View Report Output Versions” on page 90.

Default options are set by the report author. You can change default run options for reports "Set Default Report Options" on page 73.

If you choose to save, print, or send the report by email, you can choose multiple formats. If you choose to run the report later, the delivery option is automatically changed to save. For more information on saving report output, see "Save Report Output" on page 87.

## Before you begin

You must have execute permissions for the report you are attempting to run. You must have read and traverse permissions for the folder that contains the report. You need the appropriate permissions to set advanced run options.

## Procedure

1. In IBM Cognos Connection, click the run with options button on the actions toolbar to the right of the report you want to run.
2. Click **Advanced options**.
3. Under **Time and mode**, click **Run in the background**, and then click **Now** or **Later**. If you specify **Later**, set a date and time for the report to run.
4. Under **Format**, click the formats you want for the report output.
   - The Enable selection-based interactivity check box is selected by default. For information about deselecting this option, see "Disable Selection-based Interactivity" on page 100.
5. Under **Accessibility**, select **Enable accessibility support** to create accessible report output.
6. If you want to select a different or additional languages for the report, under **Languages**, click **Select the languages** and use the arrow keys to move the available languages to the **Selected languages** box and click **OK**.

   **Tip:** To select multiple languages, use the Ctrl key or use the Shift key.
7. Under **Delivery**, choose the delivery method that you want:
   - If you schedule a report for a future time, select multiple formats or languages, or burst the report. You cannot view the report now. Select one of the other delivery methods.
   - If you choose to print, click **Select a printer**. Click the button next to the printer you want to use and click **OK**. Or, if the printer is not listed, you can type the printer information.
   - If you choose to save using report view, you can change the name or destination folder of the report view. Click **Edit the save as options**, make the changes and click **OK**.
   - If you choose to email the report, proceed to step 7.
   - If you choose to send the report to your mobile device, enter your **Mobile device ID**.
8. If you select **Send the report by email**, click **Edit the email options** and set the following options:
   - To display the blind copy field, click **Show Bcc**.
   - To choose IBM Cognos Business Intelligence recipients, click **Select the recipients**. Select the check box next to the names you want to include, and click **To**, **Cc** (copy), or **Bcc** (blind copy). The entries that you select are listed under **Selected entries**.

**Tip:** To select all entries in a list, click the check box in the upper-left corner of the list. To remove names from **Selected entries**, select the check box next to the name and click **Remove**. To search, click **Search**. In the **Search string** box, type the phrase you want to search for. For advanced search features, click **Edit**. For more information, see "Searching for entries using name, description, and name or description" on page 35.

When you are done, click **OK**.

- To send the email to other recipients, in the **To:**, **Cc**, or **Bcc** boxes, type the email addresses separated by semicolons (;).

  **Tip:** If you logged on, your name automatically appears in the **To** list box.
- Under **Subject**, type the subject of the email.
- Under **Body**, type a message to be included in the email.

  **Tip:** By default, the body of the email is in HTML format, which provides advanced editing features such as font type and size, text color, text formatting and justification, numbers and bullets, indentation, and tables. To use plain text, click **Change to plain text**.

  **Note:** Note: To insert HTML format from an external source, you must view the text in a Web browser, and then copy and paste the rendered HTML into the e-mail body. If HTML text is manually typed in the body of the e-mail, the markup is treated as plain text. For security reasons, the email options dialog accepts a limited set of HTML elements and attributes. If your pasted HTML is not accepted by the validation schema you might receive the following error message: `The "VALIDATE" transform instruction could not validate the given XML content.`
- To include a hyperlink to the report, select the **Include a link to the report** check box. To include the report as an attachment, select the **Attach the report** check box.
- Click **OK**.

9. If you want to be prompted for values to filter the data in the report, under **Prompt Values**, select the **Prompt for values** check box.

   If you run the report later, the prompt values you provide are saved and used when the report runs.

   **Note:** You are prompted for values only if the report specification or model includes prompts or if you have access to multiple data source connections or signons, even if the Prompt for values check box is selected.
10. Under **Bursting**, specify whether the report should be bursted.

    This option is available only if the report author defined burst keys in the report.
11. Click **Run**.

## Running reports with report owner capabilities

When running a report as the owner, you can use the capabilities granted to the owner of the report, even if you do not have the capability yourself. The owner capabilities that can be granted let you add HTML items in reports, add user-defined SQL, and generate bursted reports.

### Before you begin

Before you can run a report as the owner, the report owner must create trusted credentials to authorize you to use their credentials. For more information, see "Create Trusted Credentials" on page 50.

### About this task

If a report, for example, uses HTML items or user-defined SQL, the corresponding capabilities **HTML Items in Report** and **User Defined SQL** are required to run the report. These capabilities are normally granted to a limited set of users, because the potential to create reports with malicious intent using either HTML or SQL is high. Selecting the **Capabilities only** option of the **Run as the owner** option allows consumers of a report to run it using specific capabilities of the owner, even if they do not have the required capabilities themselves. This differs from **Run as the owner** option in that it includes only the owner's capabilities and excludes other aspects of the owner's security context, such as access to data sources.

During normal report execution, the permissions and capabilities used to run a task are that of the caller making the run request. When **Run as the owner** option is selected, users other than the owner can run a task that requires access to privileged data. The task runs using the security credentials of the owner, not those of the user running the task. When the **Capabilities only** option is selected, users other than the owner can run a task that requires additional capabilities. The task runs using the capabilities of the owner, not those of the user running the task.

### Procedure

1. In IBM Cognos Connection, click the **Set properties** icon on the actions toolbar.
2. Click the **Report** tab for a Report Studio report, the **Query** tab for a Query Studio report, or the **Analysis** tab for a Analysis Studio report.
3. Select the check box next to the owner listed under **Run as the owner** and then click **Capabilities only**.

### Results

When the **Capabilities only** option is selected, the report runs using only the owner capabilities and not the owner credentials. The credentials of the report user, not the report owner, are used to run the report.

## Create a Report

You can create reports to analyze data and answer specific questions related to your business.

Use Query Studio to intuitively explore data by creating ad hoc reports. Report Studio is a comprehensive report authoring environment. Use it to create both highly interactive and sophisticated production reports for mass consumption by specifying queries and layouts for each report. Use Analysis Studio for analyses.

Access to the report authoring tools is controlled by the capabilities defined for your logon. If you require access to the report authoring tools but the links are not available on the top navigation bar, contact your system administrator.

An existing report may contain most of the information you require, but you may need new prompt values or changes to the layout or style. Instead of creating a new report, you can create a report view to satisfy your requirements.

For instructions about using the studios, see the following guides:

- Query Studio *User Guide*
- IBM Cognos Report Studio *User Guide*
- IBM Cognos Analysis Studio *User Guide*

### Before you begin

Before creating a report, confirm that the package containing the data for your report is available in the portal. If you do not have access to the package, contact your administrator.

**Tip:** A package is identified by the package icon .

You must have write and traverse permissions for the folder in which you want to save the new report.

### Procedure

1. In IBM Cognos Connection, choose whether you want to create a simple or complex report:
   - To create a simple report, in the upper right corner, click the **Query Studio** link .
   - To create a complex report, in the upper right corner, click the **Report Studio** link .
   - To create an Analysis Studio report, in the upper right corner, click the **Analysis Studio** link .
2. If the **Select Package** dialog box appears, do one of the following to select the package containing the data you want to use in your report:
   - In the **Recently used packages** list, click the package.
   - In the **List of all packages** list, navigate to the package and click it.

## Creating a Query Studio Report Without Using Actual Data

You can create a report without accessing the data that will eventually be used in the report.

Query Studio's preview mode lets you create or modify reports without retrieving actual data from the database. Instead, simulated data is shown.

For more information about preview mode, see the Query Studio *User Guide*.

# Create a Report View

You can create a report view, which uses the same report specification as the source report, but has different properties such as prompt values, schedules, delivery methods, run options, languages, and output formats.

Creating a report view does not change the original report. You can determine the source report for a report view by viewing its properties. The report view properties also provide a link to the properties of the source report.

If the source report is moved to another location, the report view link is not broken. If the source report is deleted, the report view icon changes to indicate a broken link , and the properties link to the source report is removed.

If you want to use a generic report as the underlying structure for additional reports, make a copy of the report "Copy an Entry" on page 27. If you want a report to appear in more than one location, create a shortcut "Create a Shortcut" on page 16.

### Before you begin

To create a report view, you must have execute or read permissions for the original report.

### Procedure

1. In IBM Cognos Connection, locate the report you want to use to create the report view.
2. Under **Actions**, click the report view button next to the report.
3. In the **Name** box, type the name of the entry.
4. If you want, in the **Description** and in the **Screen tip** box, type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view "Personalize the Portal" on page 38. The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.
5. If you do not want to use the target folder shown under **Location**, click **Select another location** and select the target folder and click **OK**.
6. Click **Finish**.

### Results

In the portal, report view entries are identified by the report view icon .

The report view has the same run options and properties as the original entry. To change the default properties of a report view, see "Set Default Report Options" on page 73. For information about properties, see "Entry Properties" on page 19.

## View Lineage Information for a Data Item

Lineage information traces the metadata of a data item in an HTML report or a report view back through the package and the data sources used by the package.

Lineage also displays any data item filters that were added by the report author, or that were defined in the data model. For example, you can click a cell in a crosstab to see how the cell value was calculated.

You can view the data item's lineage in the **Business View** or in the **Technical View**.

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

The technical view shows a graphical representation of the lineage of the selected data item. The lineage traces the data item from the package to the data sources used by the package. When you click the item, its properties appear at the bottom of the page. If you click an item in the **Package** area, you see the item's model properties. If you click an item in the **Data Sources** area, you see the item's data source properties.

You cannot view lineage information when running a report from a mobile device.

IBM Cognos Business Intelligence can be configured to use the default lineage solution that comes with the product, or a custom lineage solution. IBM InfoSphere Metadata Workbench is also supported.

The IBM Cognos lineage solution shows lineage on reports at their highest level. The lineage does not change after drilling down on a report. Because the selection context used to launch lineage can be affected by drill-down actions, we recommend that you always launch lineage at the highest report level before drilling down on the report. Otherwise, the lineage may not launch properly.

### Procedure

1. Open an HTML report or report view in IBM Cognos Viewer.
2. Right-click the data item you want, and click **Lineage**.
   The lineage views appear.

## Access the IBM InfoSphere Business Glossary

If you already use the IBM InfoSphere Business Glossary, you can access the Glossary from IBM Cognos Viewer, and from the metadata tree in Report Studio, Query Studio and Analysis Studio.

### Before you begin

Before you can access the Glossary, you must have permissions for the **Glossary** capability, and the Glossary URI must be configured by an administrator.

### Procedure

1. Open an HTML report or report view in IBM Cognos Viewer.
2. Right-click the data item you want, and click **Glossary**.

## Editing a Report

You can use the IBM Cognos Business Intelligence authoring tools to edit an existing report.

You may want to change the report layout, style, or font. The report may need to be updated because of changes to the data or to add language support.

If the report was created in Report Studio, you can edit the report in Report Studio. If the report was created in Query Studio, you can edit the report in either Query Studio or Report Studio. If you edit a Query Studio report in Report Studio, you cannot go back and edit the report in Query Studio. For more information about modifying reports, see the IBM Cognos Report Studio *User Guide*, and the Query Studio *User Guide*.

If the report was created in Analysis Studio, you can edit the report in either Analysis Studio or Report Studio. If you edit an Analysis Studio report in Report Studio, you cannot go back and edit the report in Analysis Studio. For more information about modifying Analysis Studio reports, see the Report Studio *User Guide*, and the Analysis Studio *User Guide*.

The edit button differs depending on whether the report is a Query Studio report , a Report Studio report , or an Analysis Studio report .

Editing a report modifies the report specification so that everyone who views the report sees the changes you made.

Report properties, such as the preferred output format, language, prompt values, or report retention, can be specified by changing the run options in the portal "View, Run, or Open a Report" on page 72. For information about properties, see "Entry Properties" on page 19.

If you want to use a generic report as the underlying structure for additional reports, make a copy of the report "Copy an Entry" on page 27. If you want a report to appear in more than one location, create a shortcut "Create a Shortcut" on page 16. If you want to keep the underlying report specifications but want the choice of another report format, language, delivery method, or run option, create a report view "Create a Report View" on page 79.

You must have read and write permissions for the report you are attempting to edit. You must have traverse permissions for the folder containing the report.

## Edit a Report in IBM Cognos Connection

In IBM Cognos Connection, you can open and edit an existing report in the authoring tool that was used to create it.

### Procedure

1. Open IBM Cognos Connection.
2. Click the **Open** button on the **Actions** menu for the report you want to edit.

### Results

The report opens in the authoring tool used to create the report.

## Edit a Query Studio Report in Report Studio

In IBM Cognos Connection, you can open and edit a Query Studio report in Report Studio.

### Procedure

1. Click the **More** link on the **Actions** toolbar.
2. Click **Edit with Report Studio.**

## Report Formats

You can choose the output format for a report.

You may want to view reports in a browser, or you may want the report in a format that is easily imported into another application.

You can specify the default format to be used when a report is run "Set Default Report Options" on page 73. All shortcuts to a report acquire the default format from the source entry.

You can specify the report format in the run options page "Set Report Options for the Current Run" on page 74, in the report properties "Entry Properties" on page 19, or in your preferences "Personalize the Portal" on page 38. When you run a report without specifying run options, the format specified in the report properties is used. When it is not specified in the report properties, the format specified in your preferences is used.

XHTML and some PDF formats are only available when you set advanced run options "Set Advanced Report Options for the Current Run" on page 75. You can also select multiple formats when you set advanced run options.

To specify the report format, you must have read and write permissions for the report and traverse permissions for the folder that contains the report.

### HTML Formats

You can choose HTML output format for a report.

You can select from the following HTML formats:

- HTML for standard HTML formatting
- HTML fragment if you must embed the HTML in an existing Web page
- XHTML for HTML that is passed through a parser

To select an HTML fragment and XHTML or the number of rows per web page, see "Set Advanced Report Options for the Current Run" on page 75.

### XML Format

XML report outputs save the report data in a format that conforms to an internal schema, xmldata.xsd.

You can find this schema file in c10_location/bin.

This format consists of a dataset element, which contains a metadata element and a data element. The metadata element contains the data item information in item elements. The data element contains all the row and value elements.

You can create models from reports and other data that conform to the xmldata.xsd schema. This is useful if you want to use a report as a data source for another report, or if you use a database that cannot be read by Framework Manager. In this case, export the data from the data source to an XML file, in conformance with the xmldata schema, and then open the XML file in Framework Manager.

For more information, see the Framework Manager *User Guide*.

## PDF Format

Use the PDF format to view and distribute reports in an online book format.

You must have administrator privileges to specify the advanced PDF options.

## Microsoft Excel Formats

IBM Cognos Business Intelligence can produce reports in Microsoft Excel spreadsheet software format.

The following Excel format options are available:

- **Excel 2007** produces reports that you can view in Microsoft Excel version 2007.
- **Excel 2002** produces reports that you can view in Microsoft Excel versions earlier than 2007.

Excel 2007 format renders report output in native Excel XML format, also known as XLSX, that provides a fast way to deliver native Excel spreadsheets to Microsoft Excel 2002, Microsoft Excel 2003, and Microsoft Excel 2007. Users of Microsoft Excel 2002 and Microsoft Excel 2003 must install the Microsoft Office Compatibility Pack, which provides file open and save capabilities for the new format. The output is similar to other Excel formats, with the following exceptions:

- Charts are rendered as static images.
- Row height can change in the rendered report to achieve greater fidelity.
- Column width that are explicitly specified in reports are ignored in Microsoft Excel 2007.
- Merged cells are used to improve the appearance of reports.

Excel 2002 format also offers the following benefits:

- Works with SSL protocol.
- Works with a single signon.

  Secure reports can be accessed without subsequent signons because the system automatically identifies users and provides security information.
- Works with Netscape 7.01.
- Spreadsheets are contained in a single file for reliable spreadsheet navigation.

## CSV Format

Reports saved in delimited text (CSV) format open in the application associated with the.csv file type, usually Microsoft Excel spreadsheet software, Microsoft Windows Wordpad, or Star Office.

Reports saved in CSV format

- are designed to support Unicode data across many client operating systems
- are UTF-16 Little Endian data-encoded
- include a BOM (Byte Order Mark) at the beginning of the file
- are tab-delimited
- do not enclose strings in quotation marks
- use a new line character to delimit rows
- show only the results of a report query. Page layout items, such as titles, images, and paramDisplay values do not appear in the CSV output.

## Report Languages

You can choose the languages for a report.

You can specify the report language on the run options page, in the report properties, or in your preferences. When you run a report, the language specified in the report properties is used. When it is not specified in the report properties, the language in your preferences is used.

You can run a report using the default language "View, Run, or Open a Report" on page 72, select a different language for a single run of the report "Set Report Options for the Current Run" on page 74, or select more than one language for a report "Set Advanced Report Options for the Current Run" on page 75.

You can add multilingual properties for each of the entries in the portal "Add Multilingual Properties." You can specify the default language to be used when a report is run "Set Default Report Options" on page 73.

Selecting a language for your report does not change the language used in the portal. You can change the language used in the portal interface by personalizing the portal "Personalize the Portal" on page 38. All shortcuts to a report acquire the default language from the source entry.

When a report runs, the report server connects to the underlying data source to obtain data. When using an SAP BW data source, if the SAP BW server does not support the language associated with your content locale, IBM Cognos Business Intelligence checks a locale map for a corresponding locale. If the SAP BW server supports the language for the corresponding locale, this language is used. Otherwise, the report runs using the default language installed on the SAP BW server.

To specify the report language, you must have read and write permissions for the report and traverse permissions for the folder that contains the report Chapter 4, "Access Permissions and Credentials," on page 45.

The package used to create the report must contain multilingual data before the report outputs are shown in the selected languages. For more information about packages, see Chapter 7, "Packages," on page 111.

### Add Multilingual Properties

You can set multilingual properties for each of the entries in the portal.

You can add a name, screen tip, and description for each of the locales defined by your administrator. A locale specifies linguistic information and cultural conventions for character type, collation, format of date and time, currency unit, and messages.

If the entry has multilingual properties defined for the selected language, the entry shows the properties. If the entry does not have multilingual properties defined, they are empty.

For information about changing the language to be used by the portal, see "Personalize the Portal" on page 38.

### Procedure

1. In IBM Cognos Connection, click the set properties button next to the entry you want to change.
2. Click the **General** tab.
3. Under **Language**, select a language from the list.

   Languages that already have multilingual properties defined appear at the top of the list above a separator line.
4. If you want, type a description in the **Name**, **Description**, and **Screen tip** box.

   The name appears in the list of portal entries. The description appears when you set your preferences to use the details view "Personalize the Portal" on page 38. The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

   **Tip:** To remove multilingual properties for a language, select the language in the list and click **Remove values for this language**.
5. Click **OK**.

## Specify the Default Language for a Report

To specify the default language for a report, change the report properties.

### Procedure

1. In IBM Cognos Connection, click the set properties button next to the report you want to change.
2. On the **Report options** tab, under **Language**, select the default language from the list box and click **OK**.

# Specify the Default Prompt Values for a Report

You can use prompt values to specify the range of data included in a report when it is run, for example, a date range.

You may be prompted for values if the report author defines prompts in the report or if there is more than one connection or signon. For information about adding prompts to reports, see the IBM Cognos Report Studio *User Guide*, the Query Studio *User Guide*, or the Analysis Studio *User Guide*.

If you are the report author, you can create default prompt values for a report. When the report is run, the data is automatically filtered based on the prompt values that you specify. The user does not have to specify prompt values when the report is run. You may find this useful if most users use the same prompt values each time they run a report.

If you have write access to a report and change the prompt values, those values are saved for everyone running the report after you. If you consistently use prompt values that differ from the majority of users, create a report view of the report "Create a Report View" on page 79 in your personal folders.

By default, you are prompted for values each time the report runs. You can change this in the report properties "Entry Properties" on page 19 or when you set run options for a report "Set Report Options for the Current Run" on page 74.

### Before you begin

To set default prompt values, you must have read and write permissions for the report and read or traverse permissions for the folder that contains the report.

### Procedure

1. In IBM Cognos Connection, click the set properties button next to the report you want to change.
2. On the **Report** tab for Report Studio reports, the **Query** tab for Query Studio reports, or the **Analysis** tab for Analysis Studio reports, under **Prompt values**, click either **Set** or **Edit**.

   If the report does not have saved prompt values, the run options show **No values saved** and clicking **Set** results in a message indicating that the report does not contain prompts.
3. Select the default value for the prompts and click **OK**.
4. If you want to be prompted each time the report is run, select the **Prompt for values** check box.

   If the check box is selected, you will be prompted for values if the report contains prompts or if you have access to multiple data source connections or signons.

   If the check box is not selected and the report is run interactively, you will be prompted only if there are missing values or if you have access to more than one connection or signon. The report will have missing values if saved prompts or default prompts were specified for the report.

   If the check box is not selected and the report is run in the background, the report fails if prompt values are missing.
5. Click **OK**.

## Save Report Output

You select how to save report copies as a delivery option.

All report output is stored automatically in IBM Cognos Business Intelligence. You may also be able to save copies of reports in other file locations:

- in IBM Cognos BI so that it can be used again and for archive purposes
- outside of IBM Cognos BI for use in external applications such as web sites and for use by people who don't have access to IBM Cognos BI

You can also choose how to save a report when you schedule it Chapter 12, “Schedule Management,” on page 165.

### Before you begin

Before you can save report output to file locations, your administrator must set up the locations.

### Procedure

1. In IBM Cognos Connection, click the run with options button on the actions toolbar to the right of the report you want to run.
2. Click **Advanced options**.

3. Under **Time and mode**, click **Run in the background**, and then click **Now** or **Later**.
4. Under **Delivery**, choose where you want to save your report:
   - To save a copy in IBM Cognos BI, click **Save**. Then, click **Save the report** or **Save the report as report view**. If you choose to save as report view, you can a change the name or destination folder of the report view. Click **Edit the options**, make the changes and click **OK**.
   - To save a copy outside IBM Cognos BI, click **Save to the file system**. To change the report name, click **Edit the options**. You can also change how file conflict is resolved. Click **Keep existing files** to not overwrite existing files, **Replace existing files** to simply overwrite existing files. Click **Make the file names unique and append a timestamp** or **Make the file names unique and append a sequence number** to avoid overwriting existing files by making new files with unique timestamps or sequence numbers and click **OK**.
5. If more than one file location is defined, select the location where you want to save from the **Location** list.
6. Click **Run**.

# Enabling Accessible Report Output

Accessible reports contain features, such as alternate text, that allow users with disabilities to access report content using assistive technologies, such as screen readers.

In IBM Cognos applications, you can create accessible output for reports, jobs, steps within jobs, and scheduled entries in PDF, HTML, and Microsoft Excel spreadsheet software 2007 format.

Accessible reports require more report processing and have a greater file size than non-accessible reports. Consequently, making reports accessible can have a negative impact on performance.

## Enable accessible report output using the run option

To run the report once with accessibility features, use the IBM Cognos Connection run option.

### Procedure

1. In IBM Cognos Connection, click the run with options button on the actions toolbar to the right of the report you want to run.
2. Under **Accessibility**, select **Enable accessibility support**.

## Enable accessible report output using set properties

To always run the report with accessibility features, set accessibility using the IBM Cognos Connection properties for the report..

### Procedure

1. In IBM Cognos Connection, navigate to the report, and in the **Actions** column, click **Set properties**.
2. On the **Report** tab, under **Report Options**, select **Enable accessibility support**.

## Enable accessible report output as a user preference

If you want report consumers to be able to enable accessibility features for all of their reports, set accessibility in IBM Cognos Connection as a user preference.

Accessibility settings in the report properties overwrite this setting.

### Procedure

1. In IBM Cognos Connection, click the my area options icon , and click **My Preferences**.
2. On the General tab, click **Enable accessibility support for reports I run or schedule**.

## Enable accessible output for a scheduled entry

You can enable accessible report output in IBM Cognos Connection for a scheduled entry.

### Procedure

1. In **IBM Cognos Connection**, click the schedule button for the entry you want to schedule.
2. Under **Options**, select **Override the default values**.
3. Under **Accessibility**, select **Enable accessibility support**.

## Enable accessible output for a job

You can enable accessible report output in IBM Cognos Connection for a job.

### Procedure

1. In IBM Cognos Connection, in the **Actions** column, click the set properties button for the job.
2. Click the **Job** tab and under **Defaults for all steps**, click **Set**.
3. Click **Report options**.
4. If it is not already selected, select **Specify default values for all the reports of this job**.
5. Under **Accessibility,** select **Enable accessibility support**.

## Enable accessible output for a step in a job

You can enable accessible report output in IBM Cognos Connection for a step in a job.

### Procedure

1. In IBM Cognos Connection, in the **Actions** column, click the set properties button for the job.
2. Click the **Job** tab and in the **Steps** section, select the step.
3. In the **Options and prompt values** column, click the edit icon for the step.

4. Under **Report options**, select **Override the default values**, and select **Enable accessibility support**.

   Note that the report options specified for the step appear in the **Options and prompt values** column in the **Job** tab. To edit the report options again, click the edit icon. To revert to the default settings, click the clear icon .

## View Report Output Versions

You can choose which version of output to view.

Reports are run directly against the data source so that they reflect the latest data. However, viewing the most recent data may not always meet your needs. You may want to view older data. For example, you may want to compare monthly sales volume for a product before and after new features are added.

The report output is saved when a report runs in the background. A report cannot be viewed at the time it is run when it

- runs later
- has multiple formats or languages
- has a delivery method of save, print, or email
- is a burst report

Report output versions can have multiple report formats. For information, see "Report Formats" on page 83. By default, the list contains report output versions for the language that is defined in your content locale. If no report versions are found for that language, report formats for all languages are shown. If you specify a language and there is no report output version for that language, then the **Formats** list is empty.

If burst keys are used, they appear next to the report format sorted by burst key and then by language.

You can specify how long you want to keep report output. For information, see "Specify How Long to Keep Report Output Histories" on page 92.

### Procedure

1. In IBM Cognos Connection, click the view report output versions button next to a report that has multiple output versions.
2. On the **Current** tab, choose the output version that you want to view:
   - To show report formats in a specific language or all languages, click **Languages** and select from the list.
   - To show a different output version, select the version from the **Versions** list.
   - To show the current version, from the **Formats** list, click the report format.

   **Tip:** To delete a version that you have write access to, select the version that you want to delete, and click **Delete** .
3. If you want to download a report output version, click the download icon in the **Actions** column.

## Viewing archived report output

If report output versions have been archived to an external repository for long-term storage, you can view the report output versions in the repository provided you have sufficient permissions.

### About this task

When a data source connection to an external repository is specified for a package or folder, report output versions are copied automatically to the repository. Report content may also be archived by the administrator using a content archival task. To view archived content, users must have execute and traverse permissions for the **View external documents** secured feature of the **External Repository** capability.

By default, the archived content is filtered so that only report content from the last month displays. To view older versions of report content, you can apply a custom filter.

Bursted report output that is archived cannot be viewed on the **Archived versions** tab.

**Tip:** To view older versions of bursted reports, increase the number of versions that can be accessed in IBM Cognos Connection using retentions rules.

### Procedure

1. In IBM Cognos Connection, click the view report output versions button next to a report that has multiple output versions.
2. Click the **Archived versions** tab.
3. Click the **Select date range** hyperlink and in the **Select date period** dialog box, select a date or date range of time for the output versions.
4. From the **Versions** list, choose the output version that you want to view:
   - To show report formats in a specific language or all languages, click **Languages** and select from the list.
   - To show a different output version, select the version from the **Versions** list.
   - To show the current version, from the **Formats** list, click the report format.

## Specifying how long to keep report output versions

You can specify the number of report output versions to keep and the number of days or months they should be kept.

### Procedure

1. Click the set properties button next to the entry you want.
2. On the **General** tab, under **Report output versions**, choose the retention method and type the value:
   - To keep report output for a specific number of occurrences, click **Number of occurrences** and type the number. To save an unlimited number of report outputs, set this value to 0.
   - To keep report output for a specific length of time, click **Duration** and click either **Days** or **Months**. Type the appropriate value in the box.

## Specify How Long to Keep Report Output Histories

You can keep report output for a specific number of runs or for a specific number of days or months.

For example, you can keep the report output for the ten latest occurrences or you can keep the report output for the 2 days or 6 months. You can also choose to keep all report output.

### Before you begin

You must have read and write permissions for the entry and read or traverse permissions for the folder that contains the entry.

### Procedure

1. Click the set properties button next to the entry you want.
2. On the **General** tab, under **Run history**, choose the retention method and type the value:
   - To keep report output for a specific number of occurrences, click **Number of occurrences** and type the number. To save an unlimited number of report outputs, set this value to 0.
   - To keep report output for a specific length of time, click **Duration** and click either **Days** or **Months**. Type the appropriate value in the box.
3. Click **OK**.

## Enable an Alert List for a Report

Granting permission for an alert list lets the report user decide whether to be alerted when new versions of the report output become available.

Whenever the report is run and report output is saved, the report user is alerted by email as a Bcc recipient. The email contains a link to the latest report output.

The alert list is independent of any distribution lists associated with the report "Creating Distribution Lists and Contacts" on page 103.

### Before you begin

To grant permission for an alert list, you must have write permission.

The permission to enable an alert list for a report does not extend to a report view associated with the report. You must grant permission for the report view independently.

### Procedure

1. In IBM Cognos Connection, click the set properties button next to the report for which you want to enable an alert list.
2. On the **Report** tab for Report Studio reports, the **Query** tab for Query Studio reports, or the **Analysis** tab for Analysis Studio reports, click **Advanced options**, and then click the **Enable alerts about new versions** check box.
3. Click **OK**.

### Results

Users can now add their names to the alert list for notifications of the report outputs.

## Adding or Removing Yourself from the Alert List for a Report

You can add yourself to an alert list for a report and be notified when changes occur. You can also remove yourself from the alert list for a report.

By adding yourself to the alert list for a report, you receive an email notification when new versions of the report output are saved. In this way, you can monitor changes in the output of reports that are of interest to you. If you no longer want to receive notifications about new versions of a report, you can remove yourself from an alert list.

In the email, you are included as a Bcc recipient. The email contains a link to the latest report output.

Being on the alert list is independent of any distribution lists associated with the report "Creating Distribution Lists and Contacts" on page 103.

You can view and manage the alert list for a report as a watch item.

### Add Yourself to an Alert List in IBM Cognos Connection

You can add yourself to an alert list in IBM Cognos Connection.

You can add yourself only once to the alert list for a report.

#### Before you begin

Before you can add yourself to an alert list for a report, the report owner must enable the alert list. To receive alerts, you must have an email address defined in the **My Preferences**, **Personal** tab or in your LDAP security profile (used only in special circumstances). Also, you must belong to the same namespace as the person who schedules the report.

#### Procedure

1. In the portal, locate the report.
2. In the **Actions** column, click **More**.
3. In the **Perform an action** page, click **Alert me about new versions**.
4. Click **OK**.

#### Results

In the **My Watch Items** area of the portal, note the change in the watch list.

### Remove Yourself from an Alert List in IBM Cognos Connection

You can remove yourself from an alert list in IBM Cognos Connection.

#### Procedure

1. In IBM Cognos Connection, click **My Area Options**, **My Watch Items**.
2. On the **Alerts** tab, from the list of alerts, select the alerts to delete.

3. Click **Remove me from the alert list**.

### Add or Remove Yourself from an Alert List in IBM Cognos Viewer

You can add or remove yourself from an alert list in IBM Cognos Viewer.

#### Procedure

1. Open the saved report output.
2. On the toolbar, under **Watch New Versions**, click **Alert Me About New Versions** or **Do Not Alert Me About New Versions**.

## Remove Users From an Alert List

Report authors can remove any users who are currently on the alert list for a report. When users are removed from an alert list, they are no longer alerted when new versions of the report become available.

#### Procedure

1. In the portal, locate the report.
2. In the **Actions** column, click **More**.
3. In the **Perform an action** page, click **Do not alert any about new versions**.

## Watch Rules in Saved Reports

Report users define watch rules in IBM Cognos Viewer so that they can monitor events of interest to them in saved reports. .

You can view and edit watch rules in a single location from the **My Watch Items** area in IBM Cognos Connection

Watch rules are based on numeric event conditions that are evaluated when a report is saved, not when the report runs interactively. When an event condition is satisfied, an email message or news item alerts the report user. Alternatively, the report user can alert other users by sending notifications to their task inbox.

You can create event conditions using numeric measures only in saved HTML reports. You can define an unlimited number of conditions for a report. The conditional report output uses the same locale information as the report that contains the event condition.

The report owner must enable watch rules for the report “Enable Watch Rules for a Report” before a report user can create watch rules and send alerts.

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

### Enable Watch Rules for a Report

Enabling watch rules lets the report user specify conditions in saved HTML report output, and send alerts based on these conditions.

For information about creating a watch rule, see “Create a Watch Rule for a Specific Condition” on page 95 and “Create a Watch Rule for Different Condition Status Indicators” on page 96.

### Before you begin

You must have write permission for the report to enable watch rules for a report.

### Procedure

1. In IBM Cognos Connection, click **Set properties** next to the report.
2. On the **Report** tab for IBM Cognos Report Studio reports, or the **Analysis** tab for IBM Cognos Analysis Studio reports, under **Advanced options**, select both the **Enable selection-based interactivity in HTML reports** and **Enable enhanced user features in saved output versions** check boxes.

   Selecting these options specifies that additional context information is saved with the report output.
3. Click **OK**.

### Results

Report users can now run the report and save the output in HTML format before creating watch rules.

## Create a Watch Rule for a Specific Condition

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

For example, you could set up a watch rule that sends an alert when sales figures for a product fall below a specific level.

**Note:** You can only create watch rules for reports saved in HTML format.

### Before you begin

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

### Procedure

1. Run the required report and save the output in HTML format.

   For more information, see "Set Report Options for the Current Run" on page 74.
2. In the IBM Cognos Connection portal, open the saved HTML report in IBM Cognos Viewer.
3. In the report, right-click a numeric data item and then click **Alert Using New Watch Rule**.
4. In the **Specify the rule - Alert Using New Watch Rule** page, select **Send an alert when the report contains**.
5. In the conditional expression, from the drop-down list, select the expression to use for the watch rule, for example, `>= (greater than or equal)`, and specify a value in the box.
6. Under **For the selected context**, select the report items to which the rule applies.
7. Click **Next**.

### Results

You must now set up the alert details for the watch rule. For more information, see “Define the Alert Details for the Watch Rule” on page 97.

## Create a Watch Rule for Different Condition Status Indicators

You can set up a watch rule that sends alerts depending on a metric-like change in the performance status of a condition (good, average, or poor).

In this case, you set up thresholds to map a range of numeric values to performance status (good, average, and poor). You define the threshold boundaries, and the association between boundary values and status.

For example, you could set up a watch rule that sends different alerts to a sales team depending on the sales figures for a product. If sales fall below 50 (the minimum threshold), the performance is poor. The alert for poor performance may be to send an urgent notification to the sales manager to review the figures. When sales exceed 100 (the maximum threshold), the performance is good. The alert for good performance may be to distribute the sales figures to the team.

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

You can only create watch rules in saved HTML reports.

### Before you begin

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

### Procedure

1. In the IBM Cognos Connection portal, open the saved HTML report in IBM Cognos Viewer.
2. In the report, right-click a numeric data item, and then click **Alert Using New Watch Rule**.
3. In the **Specify the rule - Alert Using New Watch Rule** page, select **Send an alert based on thresholds**.
4. In the **Performance pattern** box, select the range of values to associate with "good performance" status.
5. In the **Threshold boundaries** box, specify the boundary values for the condition.

   **Tip:** For each boundary value, click the arrow attached to the numeric value box to adjust them as follows:

   - To include the specified boundary value in the higher threshold, click the up arrow.
   - To include the specified boundary value in the lower threshold, click the down arrow.
6. Under **For the selected context**, select the report items to which the rule applies.
7. Click **Next**.

### Results

You must now set up the alert details for the watch rule. For more information, see "Define the Alert Details for the Watch Rule."

## Define the Alert Details for the Watch Rule

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

You can choose one or more of the following options:

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

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

### Procedure

1. In the **Specify the alert type - Alert Using New Watch Rule** page, specify the alerts to send when the rule is satisfied.

   **Tip:** To change the details for an alert type, click **Edit the options**.
2. If you have defined a watch rule for different condition status indicators, select the required check boxes to associate the alert with poor, average, or good performance.

   Performance is defined by the performance pattern.

   Click **Next**.
3. In the **Specify a name and description - Alert Using New Watch Rule** page, specify a name, description, screen tip, and location for the watch rule.

   **Tip:** You can organize watch rules in folders on the **Rules** tab of the **My Watch Items** area of the portal.
4. Click **Finish**.

## View, Edit, or Delete a Watch Rule in IBM Cognos Viewer

You can use IBM Cognos Viewer to edit and delete watch rules you created in saved HTML reports.

For information about creating a watch rule, see "Create a Watch Rule for a Specific Condition" on page 95, and "Create a Watch Rule for Different Condition Status Indicators" on page 96.

You can also delete and edit watch rules from the **My Watch Items** area of the portal. For more information, see "My Watch Items" on page 41.

### Before you begin

You must have write access to edit or delete a watch rule.

### Procedure

1. Open the saved report output in IBM Cognos Viewer.
2. On the toolbar, click **Watch New Versions** and, then click
   - **Modify** to edit the watch rule. When the **Set properties** dialog box appears, proceed to step 3.
   - **Delete** to delete the watch rule, and then click **OK** to complete the deletion.
3. Click the **General** tab to change properties, such as the language, name, and description of the watch rule.
4. Click the **Rules** tab to edit the rules properties, such as the conditional expression for the rule, the items to which the rule applies, and the alert type.

### Results

Changes made to a watch rule in IBM Cognos Viewer are also made in the **My Watch Items** area of the portal.

## Comments in Saved Reports

Report users can add comments to saved reports using IBM Cognos Viewer.

Comments can be added to HTML, PDF and XML reports, but not Microsoft Excel spreadsheet software or CSV reports.

Comments are added to a specific version of a report and are deleted with that report version. The comments are not available in other versions of a report, unless they are manually added by a report user.

Comments are included when a report is viewed online or when a burst report is distributed via the portal, but they are not included in printed or emailed reports.

Before a user can add comments, the report owner must enable comments in saved output versions.

To add comments, a report user must have read permission to the report output. These comments are visible to all other users who have read permission to the report output. However, only the comment owner, or an administrator, can modify or delete comments.

### Enable Comments in Saved Output Versions

Enabling comments lets a report user add comments to saved HTML, PDF or XML reports.

For information about adding comments, see "Add Comments to a Report Version in IBM Cognos Viewer" on page 99.

#### Before you begin

To enable comments for a report, you must have write permission for the report.

#### Procedure

1. In IBM Cognos Connection, click **Set properties** next to the report.

2. On the **Report** tab for Report Studio reports, the **Query** tab for Query Studio reports, or the **Analysis** tab for Analysis Studio reports, under **Advanced options**, select the **Enable comments in saved output versions** check box.
3. Click **OK**.

### Results

You must now run the report and save the report output in HTML, PDF or XML format before users can add comments to it.

## Add Comments to a Report Version in IBM Cognos Viewer

Use comments to add simple, unformatted text notes to saved reports.

You can add multiple comments to a report.

Comments can be added to HTML, PDF and XML reports only. You cannot add comments to other report formats.

### Before you begin

You must have read permission to the report output to add comments to it.

### Procedure

1. Open the saved report output in IBM Cognos Viewer.
2. On the toolbar, click **Add Comments** and then click **Add a Comment**.
3. In the **Add a Comment** window, type the comment name and description.
4. Repeat steps 2 to 3 to add further comments as required.
5. Click **Finish** to save the comment.

### Results

Each comment is added to a drop-down list available from the **Add Comments** button.

## Viewing, Modifying, or Deleting Comments in IBM Cognos Viewer

Comments added by a report user can be viewed by all other users who have read permission to the report output.

Only the comment owner, or an administrator, can modify and delete comments.

**Tip:** You can use the Search feature to find specific comments. For more information, see "Searching for entries using name, description, and name or description" on page 35.

For information about adding comments, see "Add Comments to a Report Version in IBM Cognos Viewer."

### View Comments

You can view report comments in IBM Cognos Viewer.

### Procedure

1. Open the saved report output in IBM Cognos Viewer.

2. On the toolbar, click **Add Comments** and then select the required comment from the list of comments available.

   A summary of the comment appears, which includes the comment name and description, the date it was last modified, and the owner.
3. To view the full details of the selected comment, click **View**.

   The **View Comment** window appears.
4. Click **Finish**.

### Modify Comments

You can modify report comments in IBM Cognos Viewer.

#### Procedure

1. Open the saved report output in IBM Cognos Viewer.
2. On the toolbar, click **Add Comments**, select the required comment from the list of comments available, and then click **Modify** to edit the comment.

   The **Modify Comments** window appears.
3. Edit the comment name or description.
4. Click **Finish**.

### Delete Comments

You can delete report comments in IBM Cognos Viewer.

#### Procedure

1. Open the saved report output in IBM Cognos Viewer.
2. On the toolbar, click **Add Comments**, select the required comment from the list of comments available, and then click **Delete**.
3. Click **OK** to confirm that you want to delete the comment.

## Disable Selection-based Interactivity

You can disable selection-based interactivity for an HTML report that is viewed in IBM Cognos Viewer to shorten the time that it takes the report to run.

After you disable this functionality, you cannot:

- drill up and down in a report
- drill through to other reports
- use IBM Cognos Search
- use conditional report delivery
- use agent notification

If selection-based interactivity is enabled in IBM Cognos Connection, a user can perform drill up and down and drill-through actions in Report Viewer or Query Studio. If selection-based interactivity is disabled in IBM Cognos Connection, the ability to perform drill up and down and drill-through are disabled regardless of how the drill through definitions and settings are authored in Report Studio and IBM Cognos Connection.

Selection-based interactivity is enabled by default.

**Tip:** You can instead enable or disable selection-based interactivity for the current run only.

Click **Run with options** next to the report and then click **Advanced options**. Click **Enable selection-based interactivity in HTML reports**.

### Procedure

1. In IBM Cognos Connection, click the set properties button on the actions toolbar to the right of the report.
2. Click the **Report** tab for a Report Studio report, the **Query** tab for a Query Studio report, or the **Analysis** tab for an Analysis Studio report.

   **Tip:** Disabling selection-based interactivity on an Analysis Studio report has no effect.
3. Click **Advanced options**.
4. Clear the **Enable selection-based interactivity in HTML reports** check box.

### Results

Note that disabling selection-based interactivity on an Analysis Studio report has not effect.

## Distributing Reports

You can distribute reports to other users to share information with them.

You can schedule the distribution of your reports so that recipients receive the reports regularly Chapter 12, “Schedule Management,” on page 165.

Recipients must have read permissions for the report and traverse permissions for the folder that contains the report.

When you attach a report to an email, the report is no longer secured by the IBM Cognos security system.

When sending a report by email, note that if you choose the recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails. However, if you type the email address manually, read access is not required.

To distribute reports to more than one recipient, you can create distribution lists, which contain references to users, groups, and roles. If a recipient is not part of the IBM Cognos security system, you can create a contact for that person and add it to a distribution list.

## Saving a Report

You can share a report with others by saving the report in a location that is accessible to other users, such as in the public folders.

Public folders typically contain reports that are of interest to many users.

You can save a report when you set options for the current run “Set Report Options for the Current Run” on page 74 or you can use advanced report options “Set Advanced Report Options for the Current Run” on page 75 to save a report in Report View “Create a Report View” on page 79.

To share a report that is currently located in your personal folders, copy the report "Copy an Entry" on page 27, move the report "Move an Entry" on page 28, or create a shortcut to the report "Create a Shortcut" on page 16 and save it in the public folders.

For information about saving reports, see Query Studio *User Guide*, the IBM Cognos Report Studio *User Guide*, or the Analysis Studio *User Guide*.

## Sending a Report by Email

You can share a report with others by sending the report by email.

This is especially useful if you want to share the report with a group of people who do not have access to the portal. To send a report by email, you must have Directory Administrator privileges.

You can attach reports to email "Set Advanced Report Options for the Current Run" on page 75. You can also include a URL to the report in an email. Entries that are sent as attachments to emails are no longer secured by the IBM Cognos security system.

To send a report to others by email, both you and the email recipients must have valid email addresses. Also, if you choose the recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails. However, if you type the email address manually, read access is not required.

## Sending a Report to your Mobile Device

You can choose to send a report to your mobile device. You must have IBM Cognos Mobile installed.

## Printing a Report

It may be convenient for you to have a printed copy of a report.

You may need to review a report when your computer is not available, or you may need to take a copy of a report to a meeting.

You can use run options to print a report and choose a printer "Set Advanced Report Options for the Current Run" on page 75.

## Distributing a Report by Bursting

Bursting is the process of running a report once and then sending the results to recipients, each of whom sees only a subset of the data.

Distribute reports by bursting them when you want users to receive or view reports that contain data applicable only to them.

If you distribute burst reports by email, the recipients are specified by the burst options. Note that if you choose the recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails.

If the burst report contains a drill-through link to another report and the burst report is distributed by email, set the email options to include a link to the report. Otherwise, if you include the report in the email, the drill-through links in the burst report will not work.

You can burst reports only if the report author defined burst options for the report.

You can use advanced run options "Set Advanced Report Options for the Current Run" on page 75 to distribute a report by bursting.

You must have read and write permissions for the report to enable bursting.

## Creating Distribution Lists and Contacts

Use distribution lists if you want to send a report to more than one recipient at a time.

Distribution lists contain a collection of users, groups, roles, contacts, or other distribution lists.

If a recipient is not part of the IBM Cognos security system, you can create a contact for this person. The contacts you create can also be assigned as contacts for reports.

Note that if you choose the email recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails.

### Create Distribution Lists

Use distribution lists if you want to send a report to more than one recipient at a time.

#### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click **Launch**, **IBM Cognos Administration**.
2. On the **Configuration** tab, click **Distribution Lists and Contacts**.
3. Click the **Cognos** namespace.
4. On the toolbar, click the new distribution list button .

   **Tip:** To remove a distribution list, select the entry and click the delete button.
5. Type a name and, if you want, a description and screen tip for the distribution list, and click **Next**.
6. If you want to add to the distribution list, click **Add** and choose how to select entries:
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.
   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

     *namespace/group_name;namespace/role_name;namespace/user_name;*

Here is an example:

Cognos/Authors;LDAP/scarter;

7. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   **Tip:** To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

8. Click **Finish**.

### Results

You can now choose this list when you specify recipients for a report.

### Create Contacts

If a recipient is not part of the IBM Cognos security system, you can create a contact for this person.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click **Launch**, **IBM Cognos Administration**.
2. On the **Configuration** tab, click **Distribution Lists and Contacts**.
3. Click the **Cognos** namespace.
4. On the toolbar, click the new contact button .

   **Tip:** To remove a contact, select the entry and click the delete button.

5. Type a name and email address for the contact and, if you want, a description and screen tip, and click **Finish**.

## Drilling to View Related Data

Reports that you run in IBM Cognos Connection and view in IBM Cognos Viewer support various drill operations.

Drilling through lets you can view different layers of related data. You can perform drill operations in lists, crosstabs, and charts.

### Drill Up or Drill Down

You can drill up and drill down within a report that is run from IBM Cognos Connection.

Reports run from IBM Cognos Connection appear in IBM Cognos Viewer.

In lists and crosstabs, hyperlinks identify drillable items. In charts, the pointer changes to a hand when you pause the pointer over a drillable item, and a tooltip indicates what you are drilling on. For example, a column chart shows revenue by product line by year. You can drill on a single axis, such as product line or year. You can also drill on both axes, such as Camping Equipment and 2005. In this case, you are drilling on the intersection of Camping Equipment and 2005.

If groups of data items from different queries are linked, when you drill up or drill down in one query, the data item also drills up or drills down in the linked queries. For more information about how to link groups of data items, see the IBM Cognos Report Studio *User Guide*.

After you drill up or drill down, you can save the report as a report view for later viewing. For more information, see "Create a Report View" on page 79.

The drill-up and drill-down functionality is available only when you use dimensionally structured data and view the report in HTML format. You can drill only on members in a level.

By default, the drill-up and drill-down functionality is enabled.

### Procedure

1. Run the report in IBM Cognos Connection and view it in IBM Cognos Viewer.

   **Tip:** Alternatively, you can open an Analysis Studio report or Query Studio report in their respective studios.
2. Right-click the report item you want to drill on and click **Drill Up** or **Drill Down** .

## Drill Through to Another Target

You can navigate from a report to a target.

Targets can include a Query Studio report, a Report Studio report, an Analysis Studio analysis, a PowerPlay Studio report, a package that contains a PowerCube, or a Microsoft SQL Server Analysis Services (SSAS) action.

You can also navigate from a report or analysis authored in one package to more detailed information in a report which was authored in another package. For example, this is useful when you want to drill from a summarized OLAP source, such as your sales information, into the detailed relational or transactional information, such as your inventory volumes.

Drilling through from one report to another is a method of passing information from the source (your starting report) to the target (your ending report). For example, you may be evaluating a report and discover something you need to investigate in a certain product line. You can drill through to the detailed target report which provides a focused view of that product line. When drilling through to the target, the product line you selected in the source is passed and the target report is run with that filter, making a more focused report.

By default, the ability to drill through from one report to another is enabled. You can disable it by using the **Enable selection-based interactivity** option. For more information, see "Disable Selection-based Interactivity" on page 100.

Before you can navigate to another target, a drill-through definition must be created in either the Report Studio source report or in IBM Cognos Connection.

### Procedure

1. Run the report in IBM Cognos Connection and view it in IBM Cognos Viewer.

**Tip:** Alternatively, you can open an Analysis Studio report or Query Studio report in their respective studios.

2. Right-click the report item from which you want to navigate and click **Go To** , **Related Links**. The **Go To** page appears, showing the available targets.

   **Note:** If there is only one possible target for the column, the reports runs and appears in IBM Cognos Viewer.

3. Click the target you want to navigate to.

### Results

Depending on how the drill-through definition was set up and the report type, the target opens in either IBM Cognos Viewer, Query Studio, PowerPlay Studio, or Analysis Studio.

## Drill Through to Another Target Passing Multiple Values

A report may contain a drill-through definition that can be filtered by multiple values in a single query item.

For example, while analyzing an OLAP source, you may want to focus on Canada and the United Kingdom. When you drill through, the target report is filtered by both countries and regions. After you run the report in IBM Cognos Viewer, you are prompted to choose values when you navigate from the report to the drill-through target. The values you specify are used to filter the results in the target.

For more information about drilling through to a target, see "Drill Through to Another Target" on page 105.

Drilling through using multiple values is available regardless of whether the drill-through definition is authored in the Report Studio source report or in IBM Cognos Connection, Drill-through Definitions. In previous releases, this functionality was available only when the definition was authored in IBM Cognos Connection.

### Procedure

1. Run the report in IBM Cognos Connection and view it in IBM Cognos Viewer.

   **Tip:** Alternatively, you can open an Analysis Studio, Query Studio, or PowerPlay Studio report in their respective studios.

2. Ctrl+click to select more than one value in a column.
   - If hyperlinks appear in the column in which you are attempting to select cells, click in the empty area around the hyperlinks.
   - If there are no visible hyperlinks but you know that a drill-through target exists, select the cells you want to use as the filter, regardless of whether they are in the same column. Note that when you select multiple values from different columns, the resulting filter in the target report performs an *and* rather than an *or* operation with the values passed, for example, Canada and Camping Equipment; United Kingdom and Fax.
3. Right-click in one of the selected cells from which you want to navigate, and from the menu that appears, do one of the following:
   - Under **Go To**, click the drill-through target name, if one exists.

- Under **Go To**, click **Related Links**. On the **Go To** page, click the target report you want to run.

### Results

The target report runs and if it can be filtered by the selection made in the source report, the target is filtered by those values.

## Data Sources With Named Sets May Produce Unpredictable Results

If your dimensional data sources include named sets, which are sets of members or set expressions that are created for reuse, the data results are unpredictable in Query Studio when combined with filtering and level nesting.

Additionally, if your data sources include multilevel named sets, the data results are unpredictable in Analysis Studio when aggregated.

We therefore recommend that you avoid exposing named sets or multilevel named sets to Query Studio and Analysis Studio users.

Working with named sets may also cause unpredictable results in Report Studio. For more information, see the IBM Cognos Report Studio *User Guide*.

## Series 7 Reports in IBM Cognos Connection

If your administrator configures IBM Cognos Business Intelligence to use the IBM Cognos Series 7 namespace, you can see Series 7 entries in IBM Cognos Connection.

When you run a Series 7 report, the report runs in the Series 7 application used to create it.

The contents of the Series 7 NewsIndex appears at the bottom of the page in **Public Folders**. The contents of your Series 7 personal NewsBox appears at the bottom of the page in **My Folders**.

Alternatively, PowerPlay 7.3 or later can be configured to use IBM Cognos Connection rather than Upfront as a portal. However, if you are accessing content from other IBM Cognos applications or versions previous to PowerPlay 7.3, the administrator may still depend on the Upfront portal.

When you access Series 7 entries from IBM Cognos Connection, consider the following things:

- If the Series 7 namespace and the IBM Cognos BI namespace are different, you must log on to both. Otherwise, you cannot see content in both areas.
- If you log off when you are in Upfront, you can no longer access Series 7 entries in IBM Cognos Connection. You should always log off in IBM Cognos Connection.
- If you belong to several Series 7 user classes, you are unable to select a different user class when you access Upfront through IBM Cognos Connection.
- If you use an Upfront theme other than standard70, an error message may appear when you click the **More** link in the **Actions** column. You cannot access Series 7 entries.
- If you want to cut, copy, and paste Series 7 entries, use the More link in the **Actions** column, and then use the Upfront toolbar.

- If you perform a search in IBM Cognos Connection, the Series 7 entries are not included in the search.
- You cannot combine IBM Cognos version 10.1 entries and Series 7 entries in a single folder or NewsBox.

For information about working with Series 7 entries in Upfront, see the IBM Cognos Series 7 *Web Portal User Guide*.

## Series 7 PowerPlay Reports and Cubes

After Series 7 PowerPlay reports and cubes are published to the IBM Cognos portal, you can use PowerPlay authoring tools to create and edit Series 7 PowerPlay reports.

For more information about PowerPlay authoring tools, see the PowerPlay Web *User's Guide*.

You can change the default run options of Series 7 PowerPlay reports and cubes and select multilingual properties.

Series 7 PowerPlay reports and cubes function differently from other reports. The following actions do not apply to Series 7 PowerPlay reports and cubes:

- viewing the run history and report output versions
- specifying how long to keep report outputs and histories
- canceling and suspending reports
- specifying prompt values for report formats other than PDF
- specifying language for the content of reports
- running a report as the owner
- scheduling reports
- distributing reports

## Run or Open a Series 7 PowerPlay Report

You can run Series 7 PowerPlay reports in HTML or PDF format.

When you run Series 7 PowerPlay reports

- if the HTML icon is visible, the report opens in PowerPlay Web Explorer.
- if the PDF icon is visible, the report runs in the PowerPlay Web Viewer.

PowerPlay administrators can restrict who can open cubes. For information about publishing Series 7 PowerPlay reports and cubes in IBM Cognos Business Intelligence, see the *PowerPlay Enterprise Server Guide*.

### Before you begin

If you use secured Series 7 cubes, the namespace against which the cubes are secured must be configured as an authentication source in IBM Cognos BI. This namespace need not be the only authentication namespace or the primary logon for the user. For more information about configuring authentication namespaces see the *IBM Cognos BI Installation and Configuration Guide*.

Before you can run or open Series 7 PowerPlay reports and cubes directly from IBM Cognos BI, you must have both PowerPlay 7.3 and IBM Cognos BI installed and configured. You also must have the following permissions:

- execute and read permissions to run or open a report or cube
- read and traverse permissions to access the folder that contains the report or cube
- read and write permissions to set properties for cubes and reports

### Procedure

In IBM Cognos Connection, click the report that you want.

### Results

Depending on the default action for the report, the report runs in either PDF format (default) or opens with PowerPlay Web Explorer.

If you have the required permissions, you can change the run options for Series 7 PowerPlay reports and cubes. For information about using PowerPlay Web Explorer and PowerPlay Web Viewer, see the *IBM Cognos PowerPlay Web User's Guide*.

**Tip:** To run any Series 7 PowerPlay report in PowerPlay Web Explorer, click the open with PowerPlay Explorer button in the actions toolbar. You can also click **More** next to the report you want and then open the report in Analysis Studio or Report Studio. The migration tools must already be installed. For information about installing these tools, see the *IBM Cognos BI Migration Assistant Installation and Configuration Guide*. When you open the report, it is upgraded to the format of the studio that you opened it in. If you save the report, it is saved in the upgraded format. There may be differences between the original PowerPlay report and the IBM Cognos BI version of the report. If you do not save the report, it remains a Series 7 PowerPlay report. For more information about upgrading Series 7 PowerPlay reports, see the *IBM Cognos BI Migration Assistant User Guide*.

## Change the Defaults for a Series 7 PowerPlay Report

You can change the defaults for Series 7 PowerPlay reports.

You can select one of the following default actions when a report is run:

- run the report in PDF format (default)
- open the report with PowerPlay Web Explorer

For HTML format reports, you can choose to open the report in design mode (without data). Opening a report in design mode is useful to quickly view the structure of the report.

For PDF format reports, you can choose to be prompted for values that filter the range of data included in a report. For example, you can specify a date range that is a subset of the dates available in the report. If the Series 7 PowerPlay report was created with prompt values, you are prompted to enter values when the report runs.

### Procedure

1. In IBM Cognos Connection, click the set properties button on the actions toolbar to the right of the report you want to run.
2. Click the **PowerPlay report** tab.
3. Under **Default action**, select the default action for when the report is run.
4. For HTML reports, if you want to open the report without data, design mode, select the **Open in design mode** check box.

   **Tip:** You can also click the open with PowerPlay Web Explorer in design mode button if it appears in the actions toolbar.
5. For PDF reports, if you want to be prompted for values, select the **Prompt for values** check box.

   **Tip:** The Prompt for values check box appears only if prompt values are created for the report. You can also click More next to the report you want and then click the run the report in PDF format and prompt for values button .

## Open a Series 7 Cube

You can open Series 7 cubes and work with them in PowerPlay Web Explorer.

For more information about using PowerPlay Web Explorer, see PowerPlay Web *User's Guide*.

### Procedure

In IBM Cognos Connection, click the cube that you want.

## Multilingual Properties for Series 7 Reports and Cubes

In IBM Cognos Connection, you can select the multilingual properties of a Series 7 report or cube.

The name, screen tip, and description uses the language that you select.

The content, data, category labels, and other labels do not change. The language for these items is set by the PowerPlay administrator who creates the report or cube.

# Chapter 7. Packages

You can use packages to group the data that is used for reports and to define a subset of data that is relevant to a certain group of users. For example, a package might contain information that is relevant to marketing managers for market research. The package can then be distributed to report authors by publishing it to the portal. When you run a report, the result depends on the data source that is defined in the package.

Administrators can create packages from IBM Cognos Administration. Data modelers can use Framework Manager to create models for similar purposes.

You can also create a package from IBM Cognos Connection and view the data sources that are used by a package. For example, you can organize packages in folders, create shortcuts to packages, hide, and move or copy packages.

## Creating a Package

You can create packages for SAP BW and PowerCube data sources from IBM Cognos Connection.

Packages are listed in Public Folders or My Folders, along with your other entries. You can perform the same kinds of functions on packages as you can on your other entries.

### Create a Package

You can create a package for SAP BW and PowerCube data sources from IBM Cognos Connection.

#### Create a Package from IBM Cognos Connection

The procedure to create a package from IBM Cognos Connection is as follows.

##### Procedure

1. In IBM Cognos Connection, click **Public Folders** or **My Folders** and then click the **New Package** icon in the upper right corner.
2. Select the data source that you want to use in the package and click **OK**.

   The **New Package Wizard** appears. Proceed with the steps to "Create a Package for a PowerCube" or "Create a Package for SAP BW" on page 112.

### Create a Package for a PowerCube

Before you can use a PowerCube data source in any of the IBM Cognos studios, you must create a package.

#### Procedure

1. Complete the steps in "Create a Package."
2. Enter a name for the package, and click **Next**.
3. Select the null-suppression options you want to make available to the IBM Cognos studio user:
   - **Allow Null Suppression** enables suppression.

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- **Allow Multi-Edge Suppression** allows the studio user to suppress values on more than one edge.
- **Allow Access to Suppression Options** allows the studio user to choose which types of values will be suppressed, such as zeros or missing values. By default, all null values are suppressed when suppression is enabled.

4. Click **Finish**.

## Create a Package for SAP BW

Before you can use a SAP BW data source in any of the IBM Cognos studios, you must create a package.

To edit a SAP BW package after it is created, see .

### Create a SAP BW Package

The procedure to create a SAP BW Package is as follows.

#### Procedure

1. Complete the steps in "Create a Package" on page 111.
2. Enter a name for the package, and click **Next**.
3. Select the objects to include in the package.

   There is a limit on the number of objects that you can select. By default, you can select a maximum of 2 cubes and 5 info queries.
4. To import SAP BW queries that contain dual structures and use the structures in IBM Cognos queries to control the amount and order of information that your users see, click **Enable SAP BW Dual Structures support**.

   For more information about dual structures, see the Framework Manager *User Guide*.
5. Click **Next**.
6. Select the languages to include in the package and click **Next**.

   If it is possible that the package might not contain the content locales of users, select the **Design Language** that is used as the default locale.
7. Specify the object display name.
8. To have objects in the model organized the same way that they are organized in Business Explorer Query Designer, click **Enhance the package for SAP BW organization of objects**.
9. Click **Finish**.
10. When **Package successfully created** appears, you have two options:
    - If you want to edit variable properties or reselect the metadata used in the package, click **Edit the SAP BW variables for the package after closing this dialog**. Continue with step 11.
    - Click **Close** to finish.
11. If there are variables for the package, the **Edit SAP BW Variables** page appears.

    Click the value you want to edit, then select or type the new variable.
12. Click **Save**.

### Edit a SAP BW Package

The procedure to edit a SAP BW Package is as follows.

### Procedure

1. Click **More** beside the package, then click **Edit Package**.
2. Select on of the following options:
   - To modify metadata selections, click **Modify metadata selections**. Return to step 5 in "Create a SAP BW Package" on page 112.
   - To edit the package variables, click **Edit variables**. Click the value you want to edit, then select or type the new variable. Click **OK**.
   - To modify the package settings, click **Modify package settings**, and select **Use Dynamic Query Mode**.

## View Data Sources Used by a Package

You can view the data sources that are used by a package.

You can view data sources for packages that are in the **Public** folder only, not in **My Folders**.

If you want to see if the package is using dynamic query mode for a data source, check the **Properties** page for the package.

### Before you begin

You must have set policy permission on the package and traverse and read permission on the model.

If you have read access for the data source, the localized name of the data source is shown with its associated icon. If you do not have read access for the data source, **Unavailable** is displayed instead of the name.

If you have the Data Source Connection capability and the data source referenced in the package does not exist, **Unavailable** is displayed with the default icon and the data source name in square brackets. If you do not have the Data Source Connection capability, **Unavailable** is displayed instead of the name.

### Procedure

1. Start IBM Cognos Connection.
2. Find the package in the **Public** folder and click **More**.
3. In the **Actions** column, click **View the package data sources**.

   A list of the data sources for the package is displayed under **View the data sources consumed by this package**.

# Chapter 8. Drill-through Access

Drill-through applications are a network of linked reports that users can navigate, retaining their context and focus, to explore and analyze information.

Drill-through access helps you to build business intelligence applications that are bigger than a single report.

For example, you have an Analysis Studio report that shows revenue and you want to be able to drill through to a Report Studio report that shows details of planned and actual revenue. For more information, see "Example - Drill Through Between OLAP Reports in the Same Package" on page 128.

Another example is an Analysis Studio report that lists the top 10 promotions by retailer and you want to be able to drill through to a Report Studio report that shows promotion plan revenue. For more information, see "Example - Drill Through from an OLAP Report to a DMR Report" on page 130.

Drill-through access works by passing information from the source to the target object, usually a report. You define what is passed from the source report by having the system match information from the selection context of the source report to the content of the target (dynamic drill through) or by defining parameters in the target (parameterized drill through). You define drill-through access for the source, either at the package level, in IBM Cognos Connection (Launch, Drill-through Definitions) or at the report level (Report Studio). Within a package, you control the scope of the data for which drill-through access is available in the drill through definition. Within a report, you define the drill-through access on a report item.

## What You Should Know

For a drill-through link to work, it is necessary to know:

- what the source report is or is going to be
- what the target report is or is going to be
- whether the users of the drill through link in the source report have the appropriate permissions to view or run the target report
- how the data in the two reports is related

  Depending on the underlying data, you may create a drill through definition and have IBM Cognos Business Intelligence match the data (dynamic drill through) or map the source metadata to parameters defined in the target report or package (parameterized drill through)
- whether to run the target report or to open it

  The target of drill-through access is usually a saved report definition. The report can be created in Report Studio, PowerPlay Studio, Query Studio, or Analysis Studio. The target of drill-through access can also be a package that contains a PowerCube, in which case a default view of the PowerCube is created.
- if the target is being run, in what format to run it and what filters to run it with

  If you don't want to run the target report on demand, you may link instead to a bookmark in the saved output.

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### Sources and Targets

In IBM Cognos BI, there are many different combinations of source and target. For example, you can drill through

- between reports created in different packages against different data source types, such as from an analysis against a cube to a detailed report against a relational data source. For more information on creating drill through access in packages, see "Set Up Drill-through Access in Packages" on page 123.
- from one existing report to another report using Report Studio. For more information on creating drill through access in a report, see
- between IBM Cognos Viewer reports authored in Report Studio, Query Studio, PowerPlay Studio, and Analysis Studio
- from Series 7 PowerPlay Web cubes to IBM Cognos BI reports. For more information on setting up drill through access from PowerPlay Web see, "Set Up Drill-through Access from PowerPlay Web" on page 136
- from Metric Studio to other IBM Cognos BI reports by passing parameters using URLs.

  For more information, see the Metric Studio *User Guide*.

## Understanding Drill-through Concepts

Before you set up drill-through access, you must understand the key concepts about drilling through. Knowing these concepts will help you to avoid errors so that report consumers drill through as efficiently as possible.

### Drill-through Paths

You can create a drill-through path in a source report in Report Studio, or using Drill-through Definitions in IBM Cognos Connection. A drill-through path is the definition of the path that is taken when moving from one report to another, including how the data values are passed between the reports.

Using **Drill-through Definitions**, you can create a drill-through path from any report in the source package to any target report in any other package in IBM Cognos Connection. This type of drill-through definition is stored in the source package. Users of any report in the package can use the drill-through definition to drill between any combination of Analysis Studio, Query Studio, PowerPlay Studio, or IBM Cognos Viewer reports in any package.

For any target report that contains parameters, you should map the target parameters to the correct metadata in the drill-through path. This ensures that the values from the source report are passed to the correct parameter values, and that the target report is filtered correctly. If you do not map parameters, then the users may be prompted for values when the target report is run.

A report-based drill-through path refers to a path created and stored in a Report Studio source report. This type of drill-through path is also called authored drill through. The path is associated with a specific data column, chart, or cross tab in the source report, and is available only when users select that area of the report. If an authored drill-through definition is available, a hyperlink appears in the source report when it is run.

Report-based drill-through is limited to Report Studio source reports and any target reports. Use this type of drill-through access when you want to pass data

item values or parameter results from within a source report to the target report, pass the results of a report expression to a target report, or a use URL link as a part of the drill-through definition.

## Selection Contexts

The selection context represents the structure of the values selected by the user in the source.

In Analysis Studio, this includes the context area. When a package drill-through definition is used, the selection context is used to give values for mapped parameters (parameterized drill-through) or also to map the appropriate data items and values.

Drill-through links can also be defined to open the target object at a bookmark. The content of this bookmark may also specified by the selection context.

Drill-through access is possible between most combinations of the IBM Cognos Business Intelligence studios. Each studio has been optimized for the goals and skills of the audience that uses it, and in some cases for the type of data source it is designed for. Therefore, you may need to consider how the various studios manage the selection context when you drill through between objects created in different studios, and how the data sources are conformed. During testing or debugging, you can see how source values are being mapped in different contexts using the drill-through assistant.

## Drilling Through to Different Report Formats

The settings in the drill-through definition determine the format in which users see the report results.

For example, the users may see the reports in IBM Cognos Viewer as an HTML Web page, or the reports may open in Query Studio, PowerPlay Studio, or Analysis Studio. If your users have PowerPlay Studio, then they may also see the default view of a PowerCube.

Reports can be opened as HTML pages, or as PDF, XML, CSV, or Microsoft Excel spreadsheet software formats. When you define a drill-through path, you can choose the output format. This can be useful if the expected use of the target report is something other than online viewing. If the report will be printed, output it as PDF; if it will be exported to Excel for further processing, output it as Excel or CSV, and so on.

If you define a drill-through path to a report that is created in Analysis Studio, PowerPlay Studio, or Query Studio, consumers can open the report in its studio instead of in IBM Cognos Viewer. This can be useful if you expect a consumer to use the drill-through target report as the start of an analysis or query session to find more information.

For example, if an application contains a dashboard style report of high-level data, you can define a drill-through link to Analysis Studio to investigate items of interest. The Analysis Studio view can then be drilled through to a PDF report for printing.

**Note:** Report Studio does not display data results.

## Drilling Through Between Packages

You can set up drill-through access between packages.

The two packages can be based on different types of data source, but there are some limits. The following table shows the data source mappings that support drill-through access.

| Source data source | Target data source |
|---|---|
| OLAP | OLAP<br><br>**Note:** OLAP to OLAP drill through is supported only if the data source type is the same, for example, SSAS to SSAS. |
| OLAP | Dimensionally modeled relational |
| OLAP | Relational data<br><br>**Note:** For more information, see "Business Keys" on page 121. |
| Dimensionally modeled relational | Dimensionally modeled relational |
| Dimensionally modeled relational | Relational |
| Relational | Relational |

## Bookmark References

When you drill through, the values that you pass are usually, but not always, used to filter the report.

IBM Cognos Business Intelligence supports bookmarks within saved PDF and HTML reports so that a user can scroll a report to view the relevant part based on a URL parameter.

For example, you have a large inventory report scheduled to run daily or weekly during off hours because of resource considerations. Your users may want to view this report as a target because it contains detailed information, but you want them to view the saved output rather than run this large report. Using this Action option and bookmark settings, users can drill through from another source location based on products to open the saved report to the page that shows the product they want to focus on.

When a bookmark in the source report is used in a drill-through definition, it provides the value for the URL parameter. When report consumers drill through using this definition, they see the relevant section of the target report.

Bookmark references are limited to previously run reports that are output as PDF or HTML and contain bookmark objects.

## Members and Values

Dimensionally modeled data, whether stored in cubes or stored as dimensionally-modeled relational (DMR) data, organizes data into dimensions. These dimensions contain hierarchies. The hierarchies contain levels. And the levels contain members.

These dimensions contain hierarchies. The hierarchies contain levels. And the levels contain members.

An example of a dimension is Locations. A Locations dimension may contain two hierarchies: Locations by Organization Structure and Locations by Geography. Either of these hierarchies may contain levels like Country or Region and City.

Members are the instances in a level. For example, New York and London are members in the City level. A member may have multiple properties, such as Population, Latitude, and Longitude. Internally, a member is identified by a Member Unique Name (MUN). The method by which a MUN is derived depends on the cube vendor.

Relational data models are made up of data subjects, such as Employees, which are made up of data items, such as Name or Extension. These data items have values, such as Peter Smith.

In IBM Cognos Business Intelligence, the methods of drilling through available are

- Dimensional (member) to Dimensional (member)
- Dimensional (member) to Relational (data item value)
- Relational (data item value) to Relational (data item value)

If the target parameter is a member, the source must be a member. The source and target should usually be from a conformed dimension. However, if the data will support it, you may also choose to define a mapping using different properties of the source metadata item.

If the target parameter is a value, the source can be either a value or a member. If the source is a dimensional member, you must ensure that the level or dimension is mapped to the target data item correctly in the drill-through definition. The business key from which the member is sourced should usually match the relational target value, which is most often the business key. However, if the data will support it, you may also choose to define a mapping from the caption of the source metadata item.

## Member Unique Names

The member unique name (MUN) is a unique identifier for a member in IBM Cognos reports. It is stored in the report specification when the member is referenced in the report directly.

The MUN is used in drill-through between OLAP data sources. The member keys in the MUN for the different OLAP data sources must match.

The MUN is used to find the member in the data source, which is similar to how business keys are used to find records in a table. For example, when you create OLAP dimension Products, you use the Product Line database column as s label for the members in your Product Line level. However, you use the Product Line Code business key from the database table to ensure that all the Product lines are unique in that level. The source value that you used to create the members is used in combination with the data source name, hierarchy, and level information in the member unique name.

If the MUN changes, members that are directly referenced in expressions, filters, or reports are no longer found. Changes to the MUN may be related to other changes. For example, changes to the hierarchy and level structures may change the level unique name, and changes to the business key values may change the member key path. Other factors that can affect the MUN are application changes during the design stage or over time, IBM Cognos PowerCube category codes that are

unpredictably unique, the production environment that has more members than the test environment, or removing the member from the data source.

To avoid potential problems, we recommend the following best practices when you build OLAP data sources:

- Use unique codes and keys within a dimension for the member keys.
- Define your OLAP and relational packages using unique conformed values for the source values (business keys) within similar dimensions or data values where drill-through between applications may be required.
- Ensure that the business keys and dimension metadata structure are the same in the production and test environments.
- Do not change the business keys in Framework Manager in the production environment.
- Resolve the non-unique keys in a dimension in the data source before you build the cube.

  Ensure that there are no duplicate source values in all levels of a dimension before you build a PowerCube. We do not recommend using the tilde character (~) in the category codes.

  For more information, see the section about uniqueness in the IBM Cognos Series 7 *Step-by-Step Transformer*.

For information about PowerCubes migrated from IBM Cognos Series 7, see the IBM Cognos PowerPlay *Migration and Administration Guide* or the Migration Assistant *User Guide*.

## Conformed Dimensions

If you work with more than one dimensional data source, you may notice that some dimensions are structured the same, and some are not.

The reason that dimensions can be structured differently is that the data sources may serve different purposes.

For example, a Customer dimension appears in a Revenue data store, but not in an Inventory data store. However, the Products dimension and the Time dimension appear in both data stores.

Dimensions that appear in multiple data stores are conformed if their structure is identical for all of the following:

- hierarchy names
- level names
- level order
- internal keys

Drilling through is possible between different dimensional data stores only if the dimensions are conformed, and if the dimension data store is of the same vendor type, such as IBM Cognos PowerCube as the source and the target. For example, in two data stores for Revenue and Inventory that contain Products and Time dimensions, it is possible to define the Products and Time dimensions differently for each data store. However, for drill-through between the Products and Time dimensions to work, their structures must be identical in each data store.

If you are not sure whether your dimensions are conformed, then you should check with the data modeler to ensure that the drilling through will produce meaningful results.

IBM Cognos Business Intelligence does not support conformed dimensions generated by Framework Manager for SAP BW data sources.

### Dimensionally-modeled Relational Data Sources

Ensure that each level contains a business key that has values that match your PowerCube or other DMR models. Also, you must also ensure that the **Root Business Key** property is set and uses the business key of the first level in the hierarchy. This helps to ensure that you have a conformed member unique name when attempting to drill through using members from this dimension.

## Business Keys

When drill-through access is defined from a member to a relational value, the business key of the member is passed by default.

This means that your relational target parameter must be set up using the data item with a matching value, which is most often the business key data item. You can also choose to pass the caption of the source metadata item.

For example, employees are usually uniquely identified by an employee number, not by their name, because their name is not necessarily unique. When you drill through from a dimensional member to a relational data item, the value provided is the business key. Therefore, the parameter in the target report must be defined to accept a business key value. The exact logic used to define the business key value supplied depends on the cube vendor. For IBM Cognos PowerCubes, the business key value is the **Source** property defined for the level in IBM Cognos Transformer. IBM Cognos Series 7 Transformer PowerCubes pass the source value if the drill-through flag was enabled before the cube was built. Otherwise, the category code is used.

In Report Studio, you can determine what the member business key is using an expression such as `roleValue('_businessKey',[Camping Equipment])`. This expression is case sensitive.

SSAS 2005 multipart business keys are not supported in drill-through operations.

**Tip:** When other users run your drill-through report, you may not want them to be prompted for a business key. In Report Studio, you can build a prompt page with a text that is familiar to the users, but filters on the business key. Your Framework Manager modeler can also set the **Display Item Reference** option for the **Prompt Info** property to use the business key when the data item is used in a prompt.

## Scope

Scope is specific to drill-through definitions created using Drill-through Definitions in IBM Cognos Connection (package drill-through definitions). The scope you set defines when the target report is shown to the users, based on the items they have in the source report.

Usually, you define the scope of a drill-through path to match a parameter that it passes. For example, if a target report contains a list of employees, typically you

only want to display the report as an available drill-through choice when a user is viewing employee names in a source report. If employee names are not in the source report and the scope was set on the employee name in the drill-through definition, the employee report does not appear on the list of available drill-through target reports in the **Go To** page. You can set the scope to a measure or to an item in the report.

In report-based drill-through access, where the drill-through path is associated with a specific report column, the column serves as the scope.

## Mapped Parameters

Drill-through targets may contain existing parameters or you can add parameters to the target for greater control over the drill-through link.

You usually map all parameters in a drill-through target to items from the source.

When you map source items that are OLAP or DMR members to target parameters, you can select from a set of related member properties to satisfy the requirements of the target parameter. For a dimensional target, a dimensional source item uses the member unique name by default. For a relational target, a dimensional source item uses the business key by default.

For example, you could change the source member property that is used for a mapping to the member caption instead of the business key to match the parameter in a relational target. For a dimensional target, you could define a parameter that accepts a particular property (such as business key or parent unique name), then pass the appropriate source property to satisfy that target.

Note that if you define drill through between non-conformed dimensions, you should test carefully to ensure that the results behave as expected.

If you do not specify parameter mappings, then by default, you will be prompted for any parameters required in the target when you use the drill-through link. To customize this behavior, use the display prompt pages setting.

When the action is set to **Run using dynamic filtering**, then additional filtering is applied if names from the context in the source report match names of items in the target. Use this action as well when there are no parameters defined in the target.

If parameters are not mapped correctly, then you may receive an empty report, the wrong results, or an error message.

The source and target cannot contain identical parameter names when they are from different packages, even if the data structure is conformed. If the source and target are from the same package, there is no restriction.

If you have the necessary permissions, you can use the drill-through assistant to look at what source parameters are passed, and what target parameters are mapped for a given drill-through link.

You can change the dynamic drill-through filter behaviour if you want drill-through to generate a filter using the Member Business Key instead of the default Member Caption. For more information, see Changing Drill-Through Filter Behavior in the *IBM Cognos Administration and Security Guide*.

## Drilling Through on Dates Between PowerCubes and Relational Packages

The usual method of drilling through from OLAP to relational packages requires that the target report parameter is set using the business key in the relational data, which does not work well for dates.

OLAP data sources typically view dates as members, such as Quarter 1 2006, while relational data sources view dates as ranges, such as 1/Jan/2006 to 31/March/2006.

A special feature exists for drilling through between PowerCubes and relational packages. Ensure that the target report parameter is set up using `in_range`. Note that the parameter must be of type date-time, and not integer.

An example follows:

```
[gosales_goretailers].[Orders].[Order date] in_range
?Date?
```

Also ensure that the drill-through definition maps the parameter at the dimension level and that the PowerCube date level is not set to suppress blank categories. Enabling the option to suppress blank categories in the Transformer model before you build the cube may cause the drill-through on dates to be unsuccessful. This happens because there are missing values in the range.

# Set Up Drill-through Access in Packages

A drill-through definition specifies a target for drill-through access, the conditions under which the target is available (such as the scope), and how to run or open, and filter the target.

In IBM Cognos Connection, a drill-through definition is associated with a source package. The drill-through path defined in the drill-through definition is available to any report based on the source package it is associated with. The target can be based on any target package in IBM Cognos Connection and can be stored anywhere. For example, all reports authored in the GO Data Warehouse (analysis) sample package or in a folder linked to this package can access any drill-through definition created in this package.

**Note:** For reports created in Report Studio, you can define drill-through access in specific reports by setting up the drill-through definition in the report instead of in the package, or restrict drill-through access by changing report settings so that the report is unavailable as a drill-through target. For more information, see the IBM Cognos Report Studio *User Guide*. Reports created in IBM Cognos Business Insight Advanced are not supported as drill-through targets.

You can define drill-through definitions between reports created in the different IBM Cognos Business Intelligence studios, and reports based on different packages and data sources.

The target report must exist before you start creating the drill-through definition in IBM Cognos Connection. Drill-through targets can be reports, analyses, report views, PowerCube packages and queries.

Drill-through definitions support both dimensional and relational packages, and are available to Analysis Studio, Query Studio, PowerPlay Studio, and IBM Cognos Viewer.

## Procedure

1. Check the drill-through target:
   - Confirm that the drill-through users have access to the target.
   - Hide the target from direct access if you want.
   - If necessary, check what parameters exist in the target.

     When a drill-through definition links objects in different packages, you must consider the data types used in both the source and the target object. Review the structure and values of data that you intend to pass in the drill-through, and ensure that the created parameters are appropriate for your scenario, if you have defined parameters, or that dynamic drill through will work successfully.
2. In IBM Cognos Connection, in the upper-right corner, click **Launch**, **Drill-through Definitions**.
3. Navigate to the top level of the package for which you want to create the drill-through definition.
4. Click the new drill-through definition button on the toolbar.

   **Tip:** If you do not see the drill-through definition button, then confirm that you are at the top level of the package, and not in a folder in the package. Drill-through definitions must be stored at the package level.
5. Type a name for the drill-through definition.
6. If you want, type a description and screen tip, and then click **Next**.
7. Follow the instructions on the screen:
   - If you wish, restrict the scope to a query item or a measure in the source.

     If the target contains parameters, you should set the scope to the parameters that are mapped to the target report
   - Select the target from any package available in IBM Cognos Connection.

     If PowerPlay targets are available, then you must choose whether to set the target as a report or a PowerCube.
   - Click **Next**.
8. In the **Action** section, specify how to open the target object when the drill-through link is run and if you chose to run the report, in the **Format** section, specify the format to run the report in.

   **Note:** Users may be able to change the **Action** settings when they use the drill-through link. If you are using bookmarks in the target, then you must select the action **View most recent report**.
9. In the **Parameter values** table, specify how to map the source metadata to any parameters that exist in the target report or object.

   For example, if you drill through between OLAP data sources, then members are mapped to each other. If you drill through from an OLAP to a relational data source, then the source value (member) is mapped to the query item name (value).

   Usually, every parameter that exists in the target should be mapped to the source metadata. If not, then the report user may be prompted for any missing values when the drill-through link is used.

10. Click **Map to metadata**, or click the edit button .
    - In the screen that appears, select the metadata from the source to map to the target parameter.
    - If the source package is dimensional, you can select what property of the source metadata item to use in the mapping. By default, the business key is used for a relational target, and the member unique name is used for a dimensional target.
    - Repeat for each parameter in the list.
11. In the **Display prompt pages** section, specify when the prompt pages will appear.
    - In the screen that appears, select the metadata from the source to map to the target parameter.
    - If the source package is dimensional, you can select what property of the source metadata item to use in the mapping. By default, the business key is used for a relational target, and the member unique name is used for a dimensional target.
    - Repeat for each parameter in the list.

    You can only set this action when there are parameters in the target report and the target report will be run. If you change the action to **View most recent report**, for example, for bookmark references, the **Display prompt pages** property is disabled because you will use a previously-run report. If you choose to open the report directly in Analysis Studio, then the the **Display prompt pages** property is also disabled.

    You specify prompt settings in IBM Cognos Connection (**Report Properties**, **Prompt for Values**).
12. Click **Finish**.
13. Run a report from the source package, and test the drill-through link.

    **Note:** The drill-through definition is associated and stored with the source. Errors related to the target are only generated when you run the drill-through links, not when you save the drill-through definition.

## Steps to Edit an Existing Drill-through Definition

You can edit existing drill-through definitions in IBM Cognos Connection.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click **Launch**,**Drill-through Definitions**.
2. Click a package name to view its drill-through definitions.
3. Click the set properties button on the actions toolbar to the right of the drill-through definition that you want to modify.

   **Tip:** If you do not see the drill-through definitions, check that you are not in a folder in the package. Drill-through definitions are all sotred at the root level of the package. If you do not see a specific drill-through definition, confirm that you have the correct permissions.
4. Click the **Target** tab.
5. Make the necessary modifications, and click **OK**.
6. Run a report from the source package, and test the drill-through link.

**Note:** The **drill-through** definition is associated and stored with the source. Errors related to the target are only generated when you run the drill-through links, not when you save the drill-through definition.

## Setting Up Parameters for a Drill-Through Report

For greater control over drill-through access, you can define parameters in the target report.

For more information about defining parameters, see the IBM Cognos Report Studio *User Guide* or the Query Studio *User Guide*.

### Set up parameters for a drill-through report in Report Studio

For greater control over drill-through access, you can define parameters in the target report in Report Studio.

#### Procedure

1. Open the target report in Report Studio.
2. Ensure that the report is available for drill-through access:
   - From the **Data** menu, select **Drill Behavior**.
   - In the **Basic** tab, select **Accept dynamic filters when this report is a drill-through target** and then click OK.
3. Create a parameter that will serve as the drill-through column, or that will be used to filter the report. (**Data** menu, **Filters**).

   For example, to drill through or filter on Product line, create a parameter that looks like this:

   ```
   [Product line]=?prodline_p?
   ```

   **Tip:** Use the operators `in` or `in_range` if you want the target report to accept multiple values, or a range of values.
4. In the **Usage** box, specify what to do when a value for the target parameter is not passed as part of a drill-through:
   - To specify that users must click a value in the source report, click **Required**.

     If a value for the target parameter is not passed, users are prompted to choose a value.
   - To specify that users do not need to click a value in the source report, click **Optional**.

     Users are not prompted to choose a value and so the value is unfiltered.
   - To specify not to use the parameter, click **Disabled**.

     The parameter is not used in the report, and therefore not available for drill-through definitions. For more information about defining report parameters, see the Report Studio *User Guide*.

     **Tip:** If the parameter is needed in the report for other reasons, then you can also specify not to use it in the drill-through definition (**Parameters** table, **Method**, **Do not use parameter**).

#### Results

The drill-through definition controls when prompt pages or parameters are displayed.

## Set up parameters for a drill-through report in Query Studio

For greater control over drill-through access, you can define parameters in the target report in Query Studio.

### Procedure

1. Open the target report in Query Studio.
2. Confirm that the report is available for drill-through access:
   - From the menu, select **Run Report**, **Advanced Options**.
   - Select **Enable drill through from a package in the report output** and then click OK.
3. Create a filter that will serve as the drill-through parameter, or that will be used to filter the report.
   - Select the column that you want to filter on, and click the filter button.
   - Change the settings as needed, and click OK.

## Set Up Parameters for a Drill-through Target in Analysis Studio

You can create a drill-through target analysis and add target parameters in the analysis by setting a dimension as the Go To parameter.

When you create a drill-through definition for the analysis, this parameter appears in the target parameter list.

To support drilling down within the dimension and then drilling through, map the dimension in the source metadata to the target dimension. The member or members which are currently in your view are passed to the target analysis as filter values. This applies to any query, report, or analysis used in IBM Cognos Business Intelligence drill-through actions. To support drilling through directly from a particular level, map that level in the source metadata to the target dimension.

You can set multiple parameters in an analysis target. However, you cannot pass members within a selection set in Analysis Studio.

### Procedure

1. In Analysis Studio, create a cross-tab analysis using the package that was set up for drill-through analysis.
2. If you want, add as a row or column the data item that you want to be the prompt.
3. Move or add the dimension or level that you want to be a target parameter to the **Context** area.

   **Note:** You cannot pass members within a selection set in Analysis Studio.
4. View the list for the item in the **Context** area and click **Use as "Go To" Parameter**.
5. Save this analysis as your target report in IBM Cognos Connection.

   You can now create the drill-through definition under a source package.

### Results

When you create the drill-through definition and use the cross-tab analysis as a target, the **Go To** parameter item in the analysis appears as a drill-through parameter. You can map to this parameter the same way that you drill through to Report Studio or Query Studio reports.

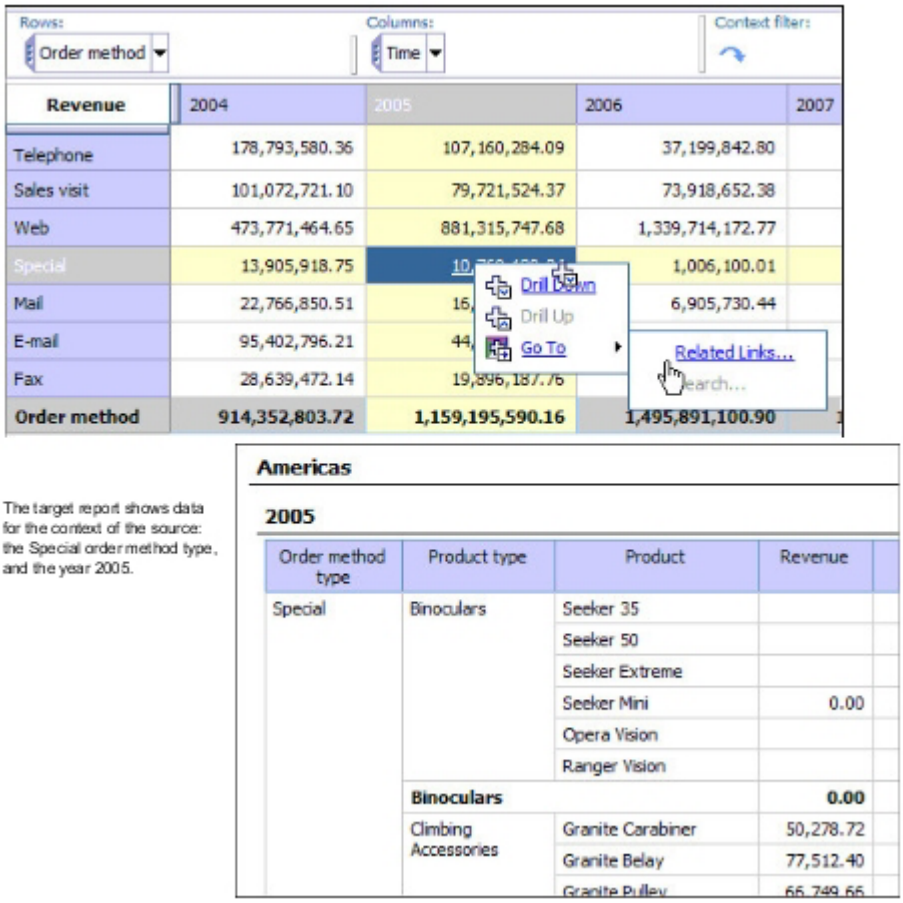
## Example - Drill Through Between OLAP Reports in the Same Package

You want to drill through from an IBM Cognos Analysis Studio report that shows revenue breakdown according to order method to a report created in Report Studio, which shows details of planned and actual revenue.

Both of these reports exist as samples in the **Sales and Marketing (cube)** package. The reports are both based on the same package, so the data is conformed. For more information, see "Conformed Dimensions" on page 120. You decide to use a parameterized drill-through definition for greater control, because prompt parameters exist in the target already.

You also decide to restrict the scope of access to the drill-through target, so it that it is only available to a report in the source package that uses the measure Revenue. This means that any reports created in the package will see this drill-through definition if they contain the measure Revenue. If the source report does not contain order year or order method, then users will be prompted for values for those parameters when the drill-through target is run.

You must have the IBM Cognos Business Intelligence samples from the deployment zip file IBM_Cognos_DrillThroughSamples installed to follow this exercise. If you want to check the target report, you must have access to Report Studio.




The target report shows data for the context of the source: the Special order method type, and the year 2005.

## Check the Target and Source Report

You can check the target and source report to ensure that drill-through will work properly.

### Procedure

1. Open the target report, **Actual vs. Planned Revenue**, in Report Studio.
   - Go to **IBM Cognos Connection**.
   - In **Public Folders**, open the package **Sales and Marketing (cube)**, and then open the folder **Report Studio Report Samples**.
   - Select the report **Actual vs. Planned Revenue**, and click the **Open with Report Studio** icon.
2. In the **Actual vs Planned Revenue** report in Report Studio, confirm that you have parameters for order method and time.
   - Open the query explorer tab and select **Query 1**.
   - In the **Detail Filters** box, confirm that a filter parameter exists for each of **Order Method** and **Year**, and note the parameter names.
3. From the **Data Items** box, note the name of the measure that you plan to use for the scope (**Revenue**)
4. Close the **Actual vs Planned Revenue** report.
5. Open the source report, **Custom Rank Sample**, in Analysis Studio.
   - Go to **IBM Cognos Connection**.
   - In the **Public Folders**, open the package **Sales and Marketing (cube)**, and then open the folder **Analysis Studio Report Samples**.
   - Select the report **Custom Rank Sample**, and click the **Open with Analysis Studio** icon.
6. In the **Custom Rank Sample** report in Analysis Studio, check the name of the measure that you want to use to restrict scope (**Revenue**).
7. Check the rows and columns in the report and confirm that the data structure will match the parameters in the **Actual vs Planned Revenue** report.

   **Tip:** Pause the mouse over a label in the cross-tab to see the path.
8. Leave the **Custom Rank Sample** report open for testing.

## Create and Test the Drill-through Definition

You can create and test the drill-through definition ensure that they work properly.

In addition to the procedure below, you can also try the following:

- In the drill-through definition, change the prompt settings for the target report.
- In the **Sales and Marketing (cube)** package, create a report that does not use the **Revenue** measure, and confirm that the **Actual vs Planned Revenue** report is no longer available as a drill-through target.
- A sample drill-through definition also exists for the same target report, **Actual vs. Planned Revenue**, from the PowerPlay Studio report **Revenue by Order Method**. If you use PowerPlay Studio, check the source and target reports and try to recreate the drill through definition.
- If you have permission to debug drill through definitions, then you can view the parameters passed from the source (**View passed source values)** and available in the target (from the drop down beside the target report name, select **View Target Mapping**).

### Procedure

1. In IBM Cognos Connection, navigate to the **Sales and Marketing (cube)** package.
2. From the upper right-hand corner of the screen, click **Launch**, **Drill-through Definitions**.
3. Click **New Drill-through Definition** in the upper right hand corner of the screen.

   **Tip:** If you do not see the **New Drill-through Definition** button, check that you are at the root of the folder, and not still in the **Analysis Studio Reports** folder.
4. In the **Drill-through Definition** wizard, type the name Drill Through From Custom Rank to Revenue Details and a description, and click **Next**.
5. Click **Set the scope**, and in the screen that appears, set the scope to the **Revenue** measure, and then click OK.
6. Click **Set the target**, and in the screen that appears, set the target report to **Actual vs. Planned Revenue**, in the **Report Studio Report Samples** folder of the **Sales and Marketing (cube)** package.
7. In the **Prompt Values** table, map the parameters **pMethod** and **pYear** in the target to the metadata in the source:
   - confirm that values in the **Type** column are Connection

     Use the value Connection when you link dimensional data sources.
   - for the **pMethod** parameter, click the edit button and select [sales_and_marketing].[Order method].[Order method].[Order method type] from the metadata tree.
   - for the **pYear** parameter, click the edit button and select [sales_and_marketing].[Time].[Time].[Year] from the metadata tree.
8. Set **Display Prompt Pages** to **Only when required parameter values are missing**.
9. Follow the instructions on the screen to save the drill-through definition.
10. Go to the **Custom Rank Sample** report, right-click outside the report data, and select **Go To**, **Related Links**.
11. Go to the **Custom Rank Sample** report, right-click on a cell in the cross-tab, and select **Go To**.

    A list of possible targets for the package and the data that is in scope appears, including the **Actual vs. Planned Revenue** report.
12. Click the **Actual vs. Planned Revenue**, and the report runs using the context you selected.

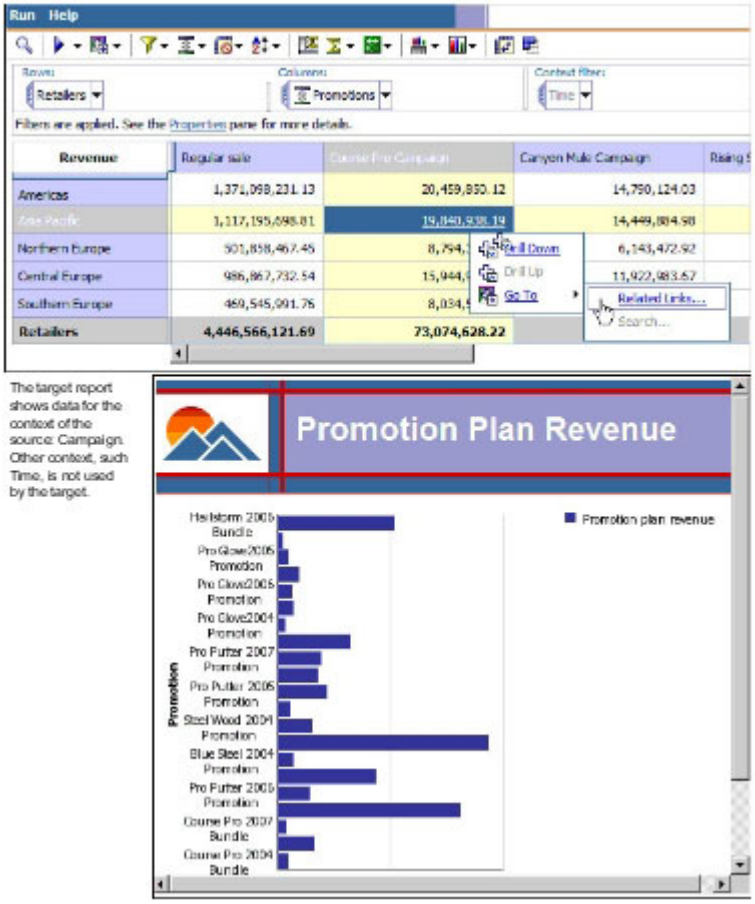
    The drill-through definition that you have created should be identical to the sample definition **MeasureDrill**.

## Example - Drill Through from an OLAP Report to a DMR Report

You want to drill through from an IBM Cognos Analysis Studio report named Top 10 Promotions by Retailers, based on the package Sales and Marketing (cube) to a Report Studio report named Promotion Plan Revenue, based on the package Sales and Marketing (conformed).

You set the drill-through definition up in the package, so that the Promotion Plan Revenue report is available to any report based on the source package, and you use dynamic drill through, instead of defining parameters.

You must have the IBM Cognos Business Intelligence samples from the deployment zip file IBM_Cognos_DrillThroughSamples installed to follow this exercise. By default, the samples are installed in the **Public Folders** in IBM Cognos Connection.




## Check the Target and Source Reports

You can check the target and source reports to ensure that drill-through will work properly.

### Before you begin

You must have the IBM Cognos Business Intelligence samples from the deployment zip file IBM_Cognos_DrillThroughSamples installed to follow this exercise. By default, the samples are installed in the **Public Folders** in IBM Cognos Connection.

### Procedure

1. Run the target report:
   - In IBM Cognos Connection, go to the **Sales and Marketing (conformed)** package, and open the folder **Report Studio Report Samples**.
   - Run **Promotion Plan Revenue** in IBM Cognos Viewer.
2. Note what information is available in the target, and how you will filter it. In this example, you filter on the campaign name.
3. Close the target report **Promotion Plan Revenue**.

4. Open the source report:
   - In IBM Cognos Connection, go to the Sales and Marketing (cube) package and open the **Analysis Studio Report Samples** folder.
   - Select **Top 10 Promotions by Retailer**, and open it in Analysis Studio.
   - Note the names of the dimension and level that you want use to drill through. In this example, you will drill through on **Campaign**.
5. Keep the **Top 10 Promotions by Retailer** report open for testing.

## Create and Test the Drill-through Definition

You can create and test the drill-through definition ensure that they work properly.

### Before you begin

You must have the IBM Cognos Business Intelligence samples from the deployment zip file IBM_Cognos_DrillThroughSamples installed to follow this exercise. By default, the samples are installed in the **Public Folders** in IBM Cognos Connection.

### Procedure

1. In IBM Cognos Connection, navigate to the **Sales and Marketing (cube)** package.
2. From the upper right-hand corner of the screen, click **Launch**, **Drill-through Definitions**.
3. Click **New Drill-through Definition** in the upper right hand corner of the screen.

   **Tip:** If you do not see the **New Drill-through Definition** button, check that you are at the root of the folder, and not still in the **Analysis Studio Report Samples** folder.
4. In the **Drill-through Definition** wizard, type the name Drill Through to Promotion Plan Revenue and a description if you want, and click **Next**.

   **Tip:** This is the name that users see in the **Go To** page, for example when they have to select from more than one drill-through target. As with any other object in IBM Cognos Connection, you can create translations of this name.
5. Click **Set the scope**, and set the scope to **Campaign**, in the **Promotions** dimension.

   This drill-through definition will only be available when **Campaign** is part of the selection context.
6. Click **Select the target**, and set the target report to **Promotion Plan Revenue**, in the **Report Studio Report Samples** folder of the **Sales and Marketing (conformed)** package, click OK, and then click Next.

   **Note:** If PowerPlay Studio is available in your installation, then you must also specify that the target is a report and not a PowerCube package.
7. Under **Action**, select **Run the report using dynamic filtering**.
8. Under **Parameter mapping**, in the **Source metadata item** column for the parameter **pcampaign**, click **map to metadata**.
9. In the screen that appears, click **Promotions** and select **Campaign**.
10. Click **Finish** to save the drill-through definition.

    You can edit the properties of the drill-through definition at any time.
11. From IBM Cognos Connection, run the Analysis Studio report **Top 10 Promotions by Retailers** and test the drill-through definition.

### Results

The target report appears, filtered by the context you selected.

The drill-through definition that you created should be identical to the drill-through definition **DrillToDMR**.

The sample drill-through definition **PPStoHidden** also goes from an OLAP to a DMR package, from the PowerPlay Studio report **Top 20 Product Brands**.

## Example - Drill Through to a Hidden Report from a Report Studio Report

You want to set up a drill-through link from an employee satisfaction report created in IBM Cognos Report Studio to a hidden list report about compensation, also created in Report Studio.

The source report (**Employee Satisfaction 2006**) is based on the package GO Data Warehouse (analysis) which is modeled on a DMR data source. The target report (**Compensation (hidden)**) is based on the package GO Data Warehouse (query). You set up this drill-through connection from within Report Studio (report-based, or authored drill through) because you do not want to make a report about compensation available for drill through from any source report in the package. The target report is already hidden in the portal, so that it is unlikely to be run by anyone who does not use the drill through link.

You must have the IBM Cognos Business Intelligence samples from the deployment zip file Cognos_DrillThroughSamples installed to follow this exercise, and you must have access to Report Studio.

The **Compensation** report is a hidden report. You may be able to set whether hidden reports are visible (**My Preferences**, **General** tab) and whether you can hide reports. This capability is set by your administrator.

### Check the Target Report

Check the target report to make sure the drill-through will work.

#### Procedure

1. Open the target report:
   - In IBM Cognos Connection, go to **Public Folders**, **GO Data Warehouse (query)**, **Report Studio Report Samples**.
   - Locate the report **Compensation (hidden)** and open it in Report Studio.

     **Tip:** If you do not see the report, go to IBM Cognos Connection and confirm that you can view hidden reports (**My Preferences**, **General** tab).
2. In Report Studio, from the **Data** menu, click **Filters** and check what filter parameters are available.

   You want to filter from the source report on department, not time, so you will only use the **pPosition** parameter in the drill-through definition.
3. In the report body, select the list column body **Position-department (level 3)** and review the data item properties.

   Because the drill-through definition goes from DMR to relational, the data item values will need to match.

4. Close the **Compensation (hidden)** report.

## Create and Test the Drill-Through Definition

Create and test the drill-through definition to make sure it works.

### Procedure

1. Open the source report:
   - In IBM Cognos Connection, go to **Public Folders**, **GO Data Warehouse (analysis)**, **Report Studio Report Samples**.
   - Locate the **Employee Satisfaction 2006** report and open it in Report Studio.
2. Save the **Employee Satisfaction 2006** report with a new name, such as **Employee Satisfaction 2006 New**.

   This is to keep the original report and drill-through definition intact for comparison.
3. In the table **Employee rankings and terminations by department**, select the column **Position-department (level 3)**.
4. In the properties pane, review the data item properties, to confirm that the data item names match values in the target report.
5. In the properties pane, under **Data**, double-click **Drill-through definitions**.
6. Select the definition **DrilltoHiddenRep** and delete it.

   **Note:** In the following steps, you recreate the drill-through definition. For comparison, use the original sample report.
7. In the **Drill-through Definitions** box, click the new drill-through definition button.
8. Click the rename button, and type a name for the drill-through definition.

   **Tip:** This is the name that consumers see when they select from a list of possible drill-through definitions in the final report.
9. In the **Target Report** tab, select the target report:
   - Under **Report**, click the ellipsis button (...).
   - Navigate to **GO Data Warehouse (query)**, **Report Studio Report Samples**, and select the **Compensation (hidden)** report.

     **Tip:** If you do not see the report, go to IBM Cognos Connection and confirm that you can see hidden reports (**My Preferences**, **General** tab).
10. Under **Action**, select **Run the report**.
11. Under **Parameters**, click the edit button.

    A table of parameters available in the target report appears, showing the parameter **pPosition**.
12. Map the parameter from the **Compensation (Hidden)** report to the metadata in the **Employee Satisfaction 2006** report:
    - In the **Method** column, select **Pass data item value**, because the target report is based on a relational data source.
    - In the **Value** column, select **Position-department (level 3)**.

      **Tip:** In this report, you pass values from the column where the drill-through is defined. In other cases, you might pass a related parameter. For example, you could drill through on employee name, but pass the employee number.
13. Save the report.
14. Run the report, and click a department to test the drill-through definition.

### Results

When you test the drill-through link, the **Compensation (hidden)** report appears, filtered by the department you selected. The report appears as a drill-through target whether or not it is hidden in IBM Cognos Connection.

If your administrator has given you the **Drill Through Assistant** capability, then you can see additional information you right-click on the link and select **Go To** see a list of drill-through targets. From the **Go To** page, you can see what source values are passed, and what target parameters are mapped.

## Specify the Drill-through Text

You can specify the drill-through text that appears when users can drill through to more than one target.

For example, if users from different regions view the report, you can show text in a different language for each region.

### Procedure

1. Right-click the drill-through object and click **Drill-Through Definitions**.
2. If more than one drill-through definition exists for the object, in the **Drill-Through Definitions** box, click a drill-through definition.
3. Click the **Label** tab.
4. To link the label to a condition, in the **Condition** box, do the following:
   - Click **Variable** and click an existing variable or create a new one.
   - Click **Value** and click one of the possible values for the variable.
5. In the **Source type** box, click the source type to use.
6. If the source type is **Text**, click the ellipsis (...) button beside the **Text** box and type text.
7. If the source type is **Data Item Value** or **Data Item Label**, click **Data Item** and click a data item.
8. If the source type is **Report Expression**, click the ellipsis (...) button beside the **Report Expression** box and define the expression.
9. If the label is linked to a condition, repeat steps 5 to 8 for the remaining possible values.

### Results

When users run the source report and click a drill-through link, the **Go to** page appears. The drill-through text you specified appears for each target. If you did not specify the drill-through text for a target, the drill-through name is used.

## Set Up Drill-through Access from IBM Cognos Visualizer

Setting up drill-through access from IBM Cognos Visualizer to IBM Cognos Business Intelligence involves setting up the target report.

### Procedure

1. Specify the IBM Cognos BI target and select the filters to add to the target report.

You must configure drill through to IBM Cognos BI for individual IBM Cognos Visualizer reports. For more information, see the IBM Cognos Visualizer *User Guide*.

2. Create and test the target report.

   For more information, see "Create and Test the Target for a Series 7 Report."

## Set Up Drill-through Access from PowerPlay Web

Setting up drill-through access from PowerPlay Web to IBM Cognos Business Intelligence involves setting up target reports.

### Procedure

1. For PowerCubes, specify drill-through targets for IBM Cognos BI reports in the Transformer model. For other cubes, specify drill-through targets for IBM Cognos BI reports in PowerPlay Connect.

   For more information, see the Transformer documentation or the PowerPlay OLAP Server Connection Guide

2. For other cubes, specify drill-through targets for IBM Cognos BI reports in PowerPlay Connect.
3. Configure drill-through access in PowerPlay Server Administration.

   In addition to enabling drill-through access to IBM Cognos BI, you must specify the location of the IBM Cognos BI server and the IBM Cognos BI folder that contains the target reports. For more information, see the PowerPlay *Enterprise Server Guide*.

4. Select the filters to add to the target report.

   In PowerPlay Enterprise Server Administration, enable and use IBM Cognos BI Assistance to identify the filter expressions required in the target report. For more information, see the PowerPlay *Enterprise Server Guide*.

5. Create and test the target report.

   For more information, see "Create and Test the Target for a Series 7 Report."

## Create and Test the Target for a Series 7 Report

You can create and test a Series 7 Report target to ensure the drill-through works properly.

When you create the target report, ensure that the names of the parameters you add are identical to the parameter names listed in the **Drill Through Assistant** page in IBM Cognos Series 7. However, the metadata item that you use in the target report for that parameter name does not have to be the identical label. The data values between the target parameter and the source value shown in the drill assistant must match. You may also need to change the type of operator in the target parameter from what is recommended in the **Drill Through Assistant**. For example, if the assistant recommends an = operator but you want to pass a date range, you should change the parameter operator in the target to in_range.

### Before you begin

The target report must be based on a published package that contains the metadata items that you want to filter on, or contains items that are mapped to those metadata items.

### Procedure

1. Start Report Studio and create a new report.
2. Add the data items and other objects you want.
3. From the **Data** menu, click **Filters**.
4. In the **Detail Filters** tab, click the add button.
5. In the **Expression Definition** box, create the parameterized filter you want by typing the filter expression.
6. Click **OK**.
7. In the **Usage** box, click **Optional**.

   If you do not make the filter optional, a prompt page appears when you drill through to the report.
8. Repeat steps 4 to 7 for other parameterized filters you want to add.
9. Save the report.

   The report name must match what you specified as a target in the PowerCube, other cube, or IBM Cognos Visualizer report.
10. Test the drill through in the PowerPlay report or IBM Cognos Visualizer report.

## Example - Drill Through Between OLAP and Relational Packages

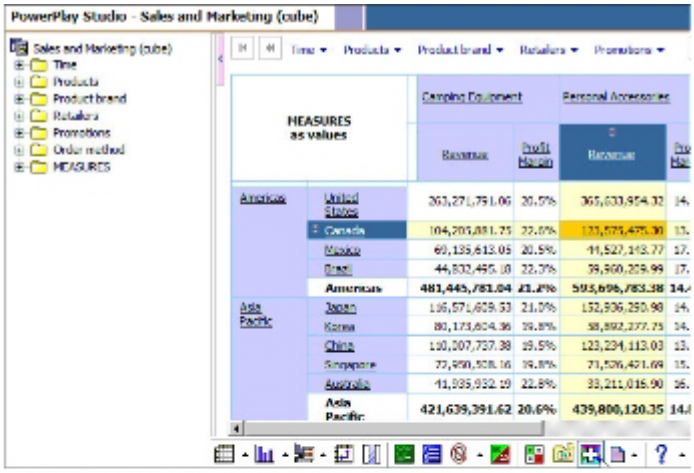
You want to drill through from an IBM Cognos PowerPlay Studio report named Profit Margin and Revenue by Country or Region to a Report Studio report named Total Revenue by Country or Region.

You set the drill-through definition up in the package, so that the revenue breakdown is available to any report in the same package.

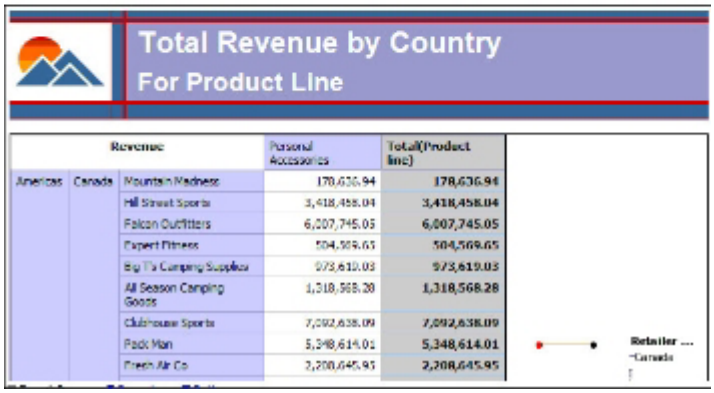
The profit margin report is based on the package Sales and Marketing (cube) and the target report is based on the relational package GO Data Warehouse (query). Therefore you need to check that the data is conformed. The target report does not contain any prompt parameters, so you will define a drill-through definition using dynamic drill through. This means that when the drill-through link is made, IBM Cognos Business Intelligence matches names of items in the context of the source to available items in the target. For more information and examples, see the IBM Cognos Business Intelligence *Administration and Security Guide*.

You must have the IBM Cognos BI samples from the deployment zip file IBM_Cognos_DrillThroughSamples installed to follow this exercise. To check the target report, you should have access to Report Studio.

**Note:** You can set up drill-through definitions without checking the target reports. However, if you set up drill-through access between packages or between objects created in different authoring tools, you should be aware of how the metadata will be matched.




The target report shows data for the context of the source: Product Line and Region and Country.




## Procedure

1. Open the target report, **Total Revenue by Country or Region**:
   - Go to **IBM Cognos Connection**.
   - From **Public Folders**, navigate to the package **GO Data Warehouse (query)**, and then open the folder **Report Studio Report Samples**.
   - Select the report **Total Revenue by Country or Region**, and open it in Report Studio.
2. Confirm the names of the data items that will be used for filtering context from the source:
   - In the Page Explorer, select the report item.
   - In the **Properties** pane, check the **Data Item** property **Name**.
   - Note the items named **Region**, **Retailer country or region**, and **Product line**.
3. Close the target report.
4. Open the source report, **Profit Margin and Revenue by Country or Region**:
   - Go to **IBM Cognos Connection**.
   - From **Public Folders**, open the package **Sales and Marketing (cube)**, and then open the folder **PowerPlay Studio Report Samples**.
   - Select the **Profit Margin and Revenue by Country or Region** report, and open it in PowerPlay Studio.
5. Review the data in the report. (For example, right-click a retailer name and select **Explain** to look at the structure of the data.)

6. Keep the **Profit Margin and Revenue by Country or Region** report open for testing.
7. In IBM Cognos Connection, navigate to the **Sales and Marketing (cube)** package.
8. From the upper right hand corner of the screen, click **Launch**, **Drill-through Definitions**.
9. Click **New Drill-through Definition** in the upper right hand corner of the screen.

   **Tip:** If you do not see the **New Drill-through Definition** button, check that you are at the root of the folder, and not still in the **PowerPlay Studio Report Samples** folder.
10. In the **Drill-through Definition** wizard, type a name, such as Drill Through to Total Revenue by Country or Region, and a description, and click **Next**.

    **Tip:** This is the name that users see in the **Go To** page, for example when they have to select from more than one drill-through target. As with any other object in IBM Cognos Connection, you can create translations of this name.
11. Click **Set the target**, **Select a report...** and in the screen that appears, set the target report to **Total Revenue by Country or Region**, in the **Report Studio Report Samples** folder of the **GO Data Warehouse (query)** package, and then click OK.
12. Click **Set the scope**, and in the screen that appears, set the scope to **[sales_and_marketing].[Retailers].[Retailers].[Retailer country or region]**, and then click OK.
13. Click **Next**.

    In the **Action** field, select **Run with dynamic filter**.
14. Leave all other settings at the default values and click **Finish**.
15. Go to the **Profit Margin and Revenue by Country or Region** report, and click the drill-through icon at the bottom of the screen.
    - If the drill-through definition you created is the only drill-through target available, the target reports runs.
    - If more than one drill-through target is available, a list of possible targets for the package and the data that is in scope appears. Click the drill-through definition that you created, and the target runs using the context you selected.

### Results

Report users in PowerPlay Studio can drill through from the **Profit Margin and Revenue by Country or Region** report to the target report that you have defined (**Total Revenue by Country or Region for Product Line**). Also, the target report is available as a drill-through target for any existing or new report based on the **Sales and Marketing (cube)** package, whenever **Retailer Country or Region** is part of the scope.

The drill-through definition that you create should be identical to the sample drill-through definition **Dynamicdrill** in the **Sales and Marketing (cube)** package.

## Create and Test the Drill-through Definition

Use the following steps to create and test the drill-through definition between an OLAP and relational package.

## Procedure

1. In IBM Cognos Connection, navigate to the **Sales and Marketing (cube)** package.
2. From the upper right hand corner of the screen, click **Launch**, **Drill-through Definitions**.
3. Click **New Drill-through Definition** in the upper right hand corner of the screen.

   **Tip:** If you do not see the **New Drill-through Definition** button, check that you are at the root of the folder, and not still in the **PowerPlay Studio Report Samples** folder.
4. In the **Drill-through Definition** wizard, type a name, such as Drill Through to Total Revenue by Country or Region, and a description, and click **Next**.

   **Tip:** This is the name that users see in the **Go To** page, for example when they have to select from more than one drill-through target. As with any other object in IBM Cognos Connection, you can create translations of this name.
5. Click **Set the target**, **Select a report...** and in the screen that appears, set the target report to **Total Revenue by Country or Region**, in the **Report Studio Report Samples** folder of the **GO Data Warehouse (query)** package, and then click OK.
6. Click **Set the scope**, and in the screen that appears, set the scope to **[sales_and_marketing].[Retailers].[Retailers].[Retailer country or region]**, and then click OK.
7. Click **Next**.

   In the **Action** field, select **Run with dynamic filter**.
8. Leave all other settings at the default values and click **Finish**.
9. Go to the **Profit Margin and Revenue by Country or Region** report, and click the drill-through icon at the bottom of the screen.
   - If the drill-through definition you created is the only drill-through target available, the target reports runs.
   - If more than one drill-through target is available, a list of possible targets for the package and the data that is in scope appears. Click the drill-through definition that you created, and the target runs using the context you selected.

## Results

Report users in PowerPlay Studio can drill through from the **Profit Margin and Revenue by Country or Region** report to the target report that you have defined (**Total Revenue by Country or Region for Product Line**). Also, the target report is available as a drill-through target for any existing or new report based on the **Sales and Marketing (cube)** package, whenever **Retailer Country or Region** is part of the scope.

The drill-through definition that you create should be identical to the sample drill-through definition **Dynamicdrill** in the **Sales and Marketing (cube)** package.

# Chapter 9. Agents

You can create agents in Event Studio to monitor your organization's data for occurrences of business events. After an agent is published to the portal, use IBM Cognos Connection to manage it.

For example, tasks can include sending an email, adding information to the portal, and running reports. For more information, see the Event Studio *User Guide*.

You can view the run history of an agent "View the Run History for Entries" on page 181 and rerun a failed agent with the initial parameters "Manage Scheduled Activities" on page 179. You can schedule agents to run at a specified time or based on a trigger, such as a database refresh or an email. You can also view the run history of scheduled agents and change the schedule credentials. For more information, see Chapter 12, "Schedule Management," on page 165.

## Run an Agent

You can run the agent manually at any time if you want to check for occurrences of specified events and perform specified tasks if those events occur.

Usually, agents run automatically according to the schedule specified by the agent author. But you may want to run an agent manually in certain circumstances. For example, an agent is created to send an e-mail to sales staff when they reach 75 percent of their sales quota for the month. The agent prompts for the sales region. A sales manager specifies Spain, and e-mails are sent only to sales staff in Spain.

### Before you begin

You must have execute permission to run an agent. You must have traverse permissions for the folder that contains the agent.

### Procedure

1. In IBM Cognos Connection, click the run with options button on the actions toolbar next to the agent you want to run.
2. Under **Time**, click **Now** to run the agent now or click **Later** to specify a later date and time.
3. If you want the agent to prompt for values to filter the results it retrieves, under **Prompt Values**, select the **Prompt for values** check box.
4. Click **Run**.

   The confirmation page appears.

   You are prompted for values if the agent specification or model includes prompts or if you have access to multiple data source connections or signons.
5. To view the run history of the agent, select **View the details of this agent after closing this dialog**.
6. Click **OK**.

   The options override the default agent options for the current run only.

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## Change Default Agent Properties

You can change the defaults that are set for agents in Event Studio, such as whether to use prompt values and run as the owner.

If the agent contains one or more tasks with a destination of **My Folders**, and someone other than the owner runs the agent, the task fails unless run as the owner is selected.

You can run an agent "Run an Agent" on page 141, create agent views "Create an Agent View," and create and edit agents in Event Studio "Open or Create an Agent from IBM Cognos Connection" on page 144.

### Before you begin

You must have execute permissions for the agent. You must have traverse permissions for the folder that contains the agent.

### Procedure

1. In IBM Cognos Connection, click the set properties button on the actions toolbar next to the agent you want to run.
2. Click the **Agent** tab.

   The tasks in the agent are shown.
3. Under **Default action**, specify the default action for the agent.
4. If you want the agent to prompt for values to filter the results that it retrieves, under **Prompt Values**, select the **Prompt for values** check box. The **Prompt for values** check box appears only if prompt values are created for the agent in Event Studio.
5. If you want the agent to run using the owner credentials, click the check box next to the owner listed under **Run as the owner**. Click **Capabilities only** to run the report using only the owner capabilities and not the owner credentials. For more information, see "Running reports with report owner capabilities" on page 77.
6. To allow users to add themselves to the alert list for the agent, click the **Allow users to add themselves to the alert list** check box.
7. Click **OK**.

   The next time the agent runs, it uses these properties instead of the original defaults.

## Create an Agent View

Agent views share event definition and tasks with the agent but can have different properties, such as prompt values and run as the owner.

Creating an agent view does not change the original agent. Except for changes to notification lists, any changes to the original agent are automatically reflected in the agent view. You can determine the source agent for an agent view by viewing its properties. The agent view properties also provide a link to the properties of the source agent.

If the source agent is deleted or moved to another location, the agent view icon changes to indicate a broken link, and the properties link to the source agent is removed.

## Before you begin

If you want to change the properties of an agent and do not need to retain an agent with the original properties, change the default agent properties. If you want to use a generic agent as the basis for a new agent, make a copy of the agent. If you want an agent to appear in more than one location, create a shortcut.

To create an agent view, you must have execute or read permissions for the original agent.

## Procedure

1. In IBM Cognos Connection, locate the agent you want to use to create the agent view.
2. Under **Actions**, click the agent view icon next to the agent.
3. In the **Name** box, type the name of the entry.
4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view. The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.
5. If you do not want to use the target folder shown under **Location**, choose another location, click **Select another folder**, select the target folder, and click **OK**.
6. Click **Finish**.

## Results

In the portal, agent view entries are identified by the agent view icon .

The agent view has the same run options and properties as the original entry.

**Related concepts**

"Entry Properties" on page 19
You can control the way an entry appears and behaves by modifying its properties. The properties for entries vary depending upon the type of entry selected and your privileges. For example, reports have properties to control run options while folders do not. If a property is not applicable to the type of entry you are customizing, it will not appear in the **Set properties** page.

**Related tasks**

"Change Default Agent Properties" on page 142
You can change the defaults that are set for agents in Event Studio, such as whether to use prompt values and run as the owner.

"Copy an Entry" on page 27
When you create a copy of an entry, you create a replica of that entry in another location in the portal. For example, create a copy if you want to use a generic report as the underlying structure for additional reports. The copy of the entry has a new ID. If there is another entry of the same name in the target location, you are prompted to replace the existing entry with the copied entry. If you choose to replace the existing entry, the ID of the existing entry is used.

"Create a Shortcut" on page 16
A shortcut is a pointer to another entry such as a report, report view, folder, job, agent, page, or URL.

"Personalize the Portal" on page 38
You can personalize the way data appears in IBM Cognos Connection by changing your preferences. For example, you can set the product language and the preferred output format of reports.

## Open or Create an Agent from IBM Cognos Connection

You can open or create agents from IBM Cognos Connection and work with them in Event Studio.

### Before you begin

For information about using Event Studio, see the Event Studio *User Guide*.

### Procedure

You can create a new agent or open an existing agent.

- To open an existing agent in Event Studio, in **Public Folders** or **My Folders**, click the agent.
- To create a new agent in Event Studio, in IBM Cognos Connection, in the upper-right corner, click **Launch**, **Event Studio**.

## Enable an Alert List for an Agent

By granting users permission to add an alert list to an agent, users can monitor business events that are important to them.

Users can add themselves to the alert list "Adding Yourself to or Remove Yourself from an Alert List for an Agent" on page 145 and be alerted by e-mail as a Bcc recipient when the agent runs and the associated tasks are performed.

The permission to add an alert list to an agent does not extend to an agent view associated with the agent. You must grant permission for the agent view independently.

### Before you begin

To grant permission for an alert list, you must have execute permission for the agent and traverse permission for the folder that contains the agent.

### Procedure

1. In IBM Cognos Connection, click the set properties button next to the agent for which you want to enable an alert list.
2. Click the **Agent** tab, and select the **Allow users to add themselves to the alert list** check box.

### Results

E-mails are sent whenever the agent is run interactively or in the background according to a schedule.

## Adding Yourself to or Remove Yourself from an Alert List for an Agent

Because an agent monitors important business events, you may want to add yourself to the alert list for the agent.

When you subscribe to an alert list, you receive an e-mail notification when the agent is run. You can also view and manage the alert list for the agent as a watch item.

Adding yourself to the alert list of an agent does not automatically add you to the alert list for any agent views associated with the agent. If you want to receive alerts for an agent view, you must add yourself to the alert list for the agent view.

The agent author must include an e-mail task with the agent and enable an alert list for the agent "Enable an Alert List for an Agent" on page 144.

### Add Yourself to or Removing Yourself from One Alert List

You can add yourself to or remove yourself from one alert list.

#### Before you begin

To add yourself to the alert list of an agent, you must have read and traverse permissions for the agent. You must also have an email address defined in your LDAP security profile or in the **My Preferences**, **Personal** tab. Also, you must belong to the same namespace as the person who schedules the agent.

#### Procedure

1. In IBM Cognos Connection, locate the agent.
2. In the **Actions** column, click **More**.
3. Click **Add me to the alert list** . or **Remove me from the alert list** .
4. Click **OK**.

### Results

Note the change for the alert list in the watch item list. To view your watch items, from the **My Area Options** menu, click **My Watch Items**.

## Remove Yourself from Multiple Alert Lists

You can remove yourself from multiple alert lists at once.

### Procedure

1. In IBM Cognos Connection, click the my area options icon and then click **My Watch Items**.
2. On the **Alerts** tab, select the alerts to delete from the alert list.
3. Click the remove me from the alert list button.

# Remove All Users from the Alert List for an Agent

You can remove all users from the alert list for an agent.

Any user that is currently on the alert list is removed.

### Before you begin

You must have set policy permission for the agent.

For more information about alert lists, see "Adding Yourself to or Remove Yourself from an Alert List for an Agent" on page 145.

### Procedure

1. In IBM Cognos Connection, locate the agent.
2. In the **Actions** column, click **More**.
3. Click **Remove all from the alert list**.

# Receive News Item Headlines

The author of an agent can specify that news item headlines be published to a folder in IBM Cognos Connection when an event occurs.

### Before you begin

For more information about news items, see the Event Studio *User Guide*.

### Procedure

1. To be able to read headlines as an RSS-style list, you must set up a page in IBM Cognos Connection that includes an IBM Cognos Navigator portlet that displays the folder where the headlines are published.
2. Edit the properties of the portlet to view the entries as a news list. For instructions, see Chapter 5, "Pages and Dashboards," on page 53.

# View the Most Recent Event List

The most recent event list compares current data with data from the last time the agent ran and groups events by event status.

For example, an agent is created to tell you when the quantity sold of any product by any sales person in your database changes. The first time the agent runs, the most recent event list identifies all sales as new events.

| Product number | Sales person | Quantity sold |
|---|---|---|
| NEW EVENTS | | |
| 3345 | Ashley McCormick | 25 |
| 3345 | Bayard Lopes | 15 |
| 2256 | Alessandra Torta | 100 |

The second time the agent runs, it finds the following product sales.

| Product number | Sales person | Quantity sold |
|---|---|---|
| 3345 | Ashley McCormick | 35 |
| 3345 | Bayard Lopes | 15 |
| 2256 | Ashley McCormick | 15 |
| 2256 | Alessandra Torta | 150 |

If you now view the most recent events list, you see the following list:

| Product number | Sales person | Quantity sold |
|---|---|---|
| NEW EVENTS | | |
| 2256 | Ashley McCormick | 15 |
| ONGOING (UNCHANGED) | | |
| 3345 | Bayard Lopes | 15 |
| ONGOING (CHANGED) | | |
| 3345 | Ashley McCormick | 35 |
| 2256 | Alessandra Torta | 150 |

## Procedure

1. In IBM Cognos Connection, locate the agent you want.
2. Under **Actions**, click the set properties icon.
3. Click the **Agent** tab.
4. Under **Default action**, click **View most recent event list**.

5. Click **OK**.

# Chapter 10. Managing Human Tasks

In IBM Cognos Business Intelligence, there are three types of human tasks you can see in the task inbox: approval requests, ad-hoc tasks, and notification requests.

Tasks can be created from

- Event Studio (notification requests and approval requests)

  For more information, see the Event Studio *User Guide*.
- the **My Inbox** area of IBM Cognos Connection (notification requests and ad-hoc tasks). For more information, see "Create an Ad-hoc Task" on page 151
- a watch rule set up for a report (notification requests only). For more information, see "Watch Rules in Saved Reports" on page 94

## Open the Task Inbox

You can open your task inbox in different ways.

You have the following options to open the task inbox.

- the IBM Cognos Business Intelligence Welcome Page by clicking **My Inbox**
- IBM Cognos Connection or IBM Cognos Administration by clicking **My Area Options**, and then clicking **My Inbox**

## Viewing your Task Inbox

Your task inbox contains approval requests, ad-hoc tasks, and notification requests for which you are a specified recipient.

The task inbox is shown in the top pane. By default, for each task, you can see the task type, priority, subject, owner, status, and date on which the task was received. In addition, if you pause the mouse over a task, a pop-up containing further task details appears.

You can view the details of a task by selecting it. The task details are shown in the reading pane. If the task contains an attachment, such as a report, you can double-click to view it.

### Tips

- To view the due date for tasks instead of the date received, from the **Display Date Received** drop-down list, select **Next Deadline Date**.
- To view your archived tasks, click the **Archive** tab.

## Filter Tasks in your Inbox

By default, your task inbox contains all tasks that are relevant to you. You can set up a filter so that you see only a subset of tasks.

You can set up filters for

- task type (task or notification)
- priority (low, medium, or high)
- status (not started, started, completed, canceled)

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- date

### Procedure

1. View your task inbox.
2. For each filter you want to set, select the required filter option from the filter name drop-down list.

   For example, to view only notification request tasks, select **Notifications** from the **All Types** filter.

   The filter name is updated to show the current filter.

## Approval Requests and Ad-hoc Tasks

You can create approval requestion using Event Studio.

For more information, see the Event Studio *User Guide*.

You can create ad-hoc tasks from your task inbox. For more information, see "Create an Ad-hoc Task" on page 151.

An approval request or ad-hoc task can have various recipients:

- a task owner - one specific user
- potential owners - multiple users, groups, roles, or distribution lists
- stakeholders - one or more interested parties, who are not potential owners

If a task only has one potential owner, that user automatically becomes the task owner. If a task has multiple owners, the user who claims the task becomes the task owner.

It is possible to create a task with one or more stakeholders, but no owner or potential owners. In this case, stakeholders can assign potential owners after it has been created.

### Task Status

The status of an approval request or ad-hoc task can be one of the following:

- Not Started - the task is waiting to be started.
- Started - the task has an owner and is in progress.
- Completed - the owner has complete the task.
- Canceled - the task has been canceled by a recipient.

## View Comments

You can view comments added by other recipients, as well as audit history comments, recorded by the system.

You can also add your own comments to a task. For more information, see "Add Comments to a Task" on page 155.

### Procedure

1. View your task inbox.
2. Select the task for which you want to view comments, and then click the **Discussion** tab in the reading pane.

   By default, only user comments are shown.

3. Select the type of comments you want to view from the comments drop-down list.

   You can view all user and audit comments, or you can filter the display by comment type.

## Subscribe to E-mail Notifications

The default notification options are set up when the task is created. You can change your subscriptions for any task with a status of Not Started or Started.

You can choose to receive, or stop receiving, notifications when

- a task is not started by the start date
- a task is not completed by the due date
- the status of a task changes (started, completed or canceled)
- the owner of a task changes
- a user comment is added to a task

**Notes**

- Notifications are sent to the task owner and copied to all stakeholders.
- The recipient who changes the status or owner of a task, or adds a user comment, does not receive the associated notification.

### Procedure

1. View your task inbox.
2. Select the task for which you want to change your notification subscriptions, and then click the **Notification Options** tab in the reading pane.
3. Select the appropriate check boxes for the notifications you want to receive, and clear the boxes for those you do not require.
4. Click **Save**.

## Create an Ad-hoc Task

Create an ad-hoc task to send a task to the task inbox of the recipients you specify.

You can add deadlines to an ad-hoc task when you create it. Alternatively, potential owners or stakeholders can add deadlines at a later date, by updating the task from their task inbox.

You can set up notification options for the task owner to receive e-mails when

- an ad-hoc task is not completed by the due date
- an ad-hoc task is not started by the start date

**Note:** Stakeholders are also copied on these e-mails.

In addition, you can set up notification options for the task owner and all stakeholders to receive e-mails when

- the status of an ad-hoc task changes (started, completed or canceled)
- the owner of an ad-hoc task changes
- a comment is added to an ad-hoc task

**Note:** Potential owners and stakeholders can unsubscribe from receiving specific notifications by updating the task from their task inbox.

## Procedure

1. View your task inbox.
2. From the task drop-down list, select **New Task** .
3. In the reading pane, click **Add/Remove recipients**.

   The **Select recipients** page appears.
4. Select the required users, groups, roles, and distribution lists to add as potential owners and stakeholders.
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, roles or distribution lists.

     **Tip:** To make the user entries visible, click **Show users** in the list.
   - To search for entries, click **Search** and, in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

     *namespace/group_name;namespace/role_name;namespace/user_name;*

     Here is an example:

     Cognos/Authors;LDAP/scarter;
5. Click the **Potential Owner** or **Stakeholder** arrow button to update the **Selected entries** list, and click **OK**.

   **Tip:** To remove entries from the **Selected entries** list, select them and click **Remove**. To select all the entries in a list, click the check box in the upper-left corner of the list.
6. Click **OK**.
7. In the **Subject** box, type the subject of the task.
8. If required, add a completion deadline for the task in the **Due Date** box.
9. If required, add a start by deadline for the task in the **Start By** box.
10. Select the priority from the **Priority** list.
11. In the **Message** box, type text directly.
12. To add links, click **Add links**, select the entries you want, click the arrow button to update the **Selected entries** list, and click **OK**.

    **Tip:** To remove links, select them and click **Remove links**.
13. If you want to set up notification options, click **Advanced**, otherwise move on to step 16.
14. Select the task creation and deadline notification options as required:
    - **Send notification if not started by the start date**
    - **Send notification if not completed by due date**
15. Select the approval request change notification options as required:
    - **Started**
    - **Comment**
    - **Owner changed**
    - **Completed**
    - **Canceled**
16. Click **Save**.

## Actions That You can Perform on Approval Requests and Ad-hoc Tasks

The actions you can perform on an approval request or ad-hoc task differ depending on your recipient type.

The following table summarizes the actions that can be performed by each type of recipient.

| Action | Potential owner | Owner | Stakeholder |
|---|---|---|---|
| Claim ownership of a task | ✔ | | |
| Change the recipients for a task | ✔ | ✔ | ✔ |
| Revoke ownership of a task | | ✔ | |
| Set deadlines for a task | ✔ | ✔ | ✔ |
| Change the priority of a task | ✔ | ✔ | ✔ |
| Add comments to a task | ✔ | ✔ | ✔ |
| Start or stop a task | | ✔ | |
| Complete a task | | ✔ | |
| Cancel a task | | ✔ | ✔ |

## Claim a Task

If you are a potential owner of a task that is Unclaimed, you can claim the task. The task is then owned by you.

If you are the only potential owner of a task, the task is automatically owned by you. In this case, it is not necessary to claim the task.

### Procedure

1. View your task inbox.
2. Select the task you want to claim, and then click **Make me the owner** in the reading pane.

## Change the Recipients for a Task

Any task recipient can change the current owner of a task.

In addition, they can add or remove potential owners and stakeholders for a task. The status of the task must be Not Started or Started.

**Note:** If you are the owner of a task, you can revoke ownership of the task "Revoke Ownership of a Task" on page 155.

## Change the Current Owner

You can change the current owner.

### Procedure

1. View your task inbox.
2. Select the task for which you want to change the current owner, and then click **Change Owner** in the reading pane.

   The **Select the user** page appears.
3. Select the user.
   - To choose from listed entries, click the appropriate namespace, and then select the required user.
   - To search for an entry, click **Search** and, in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
4. Click **OK**.
5. Click **Save**.

## Change the Potential Owners and Stakeholders

You can change the potential owners and stakeholders.

### Procedure

1. View your task inbox.
2. Select the task for which you want to change potential owners and stakeholders, and then click **Add/Remove recipients** in the reading pane.

   The **Select recipients** page appears.
3. Select the required users, groups, roles, and distribution lists.
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, roles or distribution lists.

     **Tip:** To make the user entries visible, click **Show users** in the list.
   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

     *namespace/group_name;namespace/role_name;namespace/user_name;*

     Here is an example:

     Cognos/Authors;LDAP/scarter;
4. Click the **Potential Owner** or **Stakeholder** arrow button to update the **Selected entries** list, and click **OK**.

   **Tip:** To remove entries from the **Selected entries** list, select them and click **Remove**. To select all the entries in a list, click the check box in the upper-left corner of the list.
5. Click **OK**.
6. Click **Save**.

## Revoke Ownership of a Task

If you are the owner of a task, you can remove yourself as the task owner.

This changes the owner to Unclaimed and the status of the task to Not Started.

### Procedure

1. View your task inbox.
2. Select the task you want to revoke, and then click **Remove me as owner** in the reading pane.

## Set Deadlines for a Task

Any task recipient can add a start date or due date for an approval request or ad-hoc task with a status of Not Started or Started. They can also amend existing deadlines.

Where notifications are set up, if a task is not started or completed by the required time, e-mail notifications are sent all subscribing potential owners and stakeholders. For more information on notifications, see "Subscribe to E-mail Notifications" on page 151.

### Procedure

1. View your task inbox.
2. Select the task for which you want to update the deadlines.
3. If required, add a completion deadline for the task in the **Due Date** box.
4. If required, add a start by deadline for the task in the **Start By** box.
5. Click **Save**.

## Change the Priority of a Task

The priority of a task is set when the task is created. Any task recipient can change the priority of a task with a status of Not Started or Started.

### Procedure

1. View your task inbox.
2. Select the task for which you want to change the priority, and then select the priority from the **Priority** list in the reading pane.
3. Click **Save**.

## Add Comments to a Task

Any task recipient can add comments to a task.

For information on viewing comments added to a task, see "View Comments" on page 150.

### Procedure

1. View your task inbox.
2. Select the task for which you want to add a comment, and then click the **Discussion** tab in the reading pane.
3. Click **Add Comment** , type your comments in the window that appears, and then click **OK**.
4. Click **Save**.

## Start or Stop a Task

If you are the owner of a task that has not been started, you can start the task.

This changes the status to Started so that other task recipients can view the progress of your task.

A potential owner can also start an unclaimed task. The user then becomes the owner of that task.

If you own a task that has already been started, you can stop the task. This changes the status to Not Started.

### Procedure

1. View your task inbox.
2. Select the task you want to start, and then select **Start task** from the **Status** drop-down list in the reading pane.

   **Tip:** To stop a task that has been started, select **Not Started** from the **Status** drop-down list.
3. Click **Save**.

## Completing a Task

If you are the owner of a task with a status of Not Started or Started, you can complete the task by performing the required action.

The action required differs depending on the task type. For ad-hoc tasks, you must mark the task as complete.

For approval request tasks, the action depends on how the task creator set up the task. You must perform one of the following actions:

- approve or reject the request

  For this type of approval request, you must approve or reject the request from your task inbox to complete the task.

  Depending on how the task was set up, completion of the task may result in another action being performed. For example, if you approve a request to distribute a report, when the task is complete, the report may be automatically distributed. If the request is rejected, no further actions will occur.
- Specify the remaining tasks to approve and run

  This type of approval request contains one or more tasks that are scheduled to run after the task is complete. You must select which tasks you approve to run.

### Complete an Ad-Hoc Task

The procedure to complete an ad-hoc task is as follows.

#### Procedure

1. View your task inbox.
2. Select the task you want to complete and then click **Mark as complete**.

   The status of the task changes to Completed.

### Approve or Reject a Request

The procedure to approve or reject a request is as follows.

### Procedure

1. View your task inbox.
2. Select the task you want to complete and view the details in the reading pane.
3. If required, add a comment to explain your decision in the **Comment** box.
4. Click **Approve** or **Reject** to complete the task.

   **Note: Approve** and **Reject** are the default button names. The user who created the task may have used custom button names, which differ from the default.

   The status of the task changes to Completed.

### Specify the Remaining Tasks to Approve and Execute

You can specify the remaining tasks to approve and execute.

### Procedure

1. View your task inbox.
2. Select the task you want to complete and view the details in the reading pane.
3. Select the remaining tasks to approve, and then click **Submit**.

   **Note: Submit** is the default button name. The user who created the task may have used a custom button name, which differs from the default.

   The status of the task changes to Completed.

## Cancel a Task

A task owner or stakeholder can cancel an approval request or ad-hoc task with a status of Not Started or Started.

### Procedure

1. View your task inbox.
2. Select the task you want to cancel, and then click **Mark as canceled** in the reading pane.

   The status of the task changes to Canceled.

# Notification Requests

You can create notification requests that stipulate that acknowledgments are required and you can specify deadlines for acknowledgements.

A notification request can have various recipients:

- users, groups, roles, and distribution lists to whom the request is sent
- stakeholders to whom the request is copied

Each recipient is assigned as the owner in their task inbox.

The status of a notification request can be

- Unread - the request has not been opened by a recipient
- Read - the request has been opened by a recipient
- Acknowledged - the request has been confirmed by a recipient to whom it was sent

Notifications can also be created in Event Studio. For more information, see the Event Studio *User Guide*.

### Acknowledgements

When a notification request is created, it is possible to stipulate that an acknowledgement is required by each recipient to whom it is sent.

**Note:** Stakeholders are not required to acknowledge notification requests.

### Deadlines

When a notification request is created, it is possible to include an acknowledgement deadline. If any recipient does not acknowledge a notification request within the specified number of days, e-mail notifications are sent to all recipients who have not yet acknowledged the request, and copied to all stakeholders.

When all the required recipients have acknowledged the request, the deadline is canceled.

## Create a Notification Request

Add a notification request to an agent to send a secure notification about an event to the inbox of recipients you specify.

You can request an acknowledgement, and add an acknowledgement deadline.

### Procedure

1. View your task inbox.
2. Select **New Notification** from the task drop-down list.
3. Click **Add/Remove recipients** in the reading pane.

   The **Select recipients** page appears.
4. Select the required users, groups, roles, and distribution lists to add as recipients.
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, roles or distribution lists.

     **Tip:** To make the user entries visible, click **Show users** in the list.
   - To search for entries, click **Search** and, in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

     *namespace/group_name;namespace/role_name;namespace/user_name;*

     Here is an example:

     Cognos/Authors;LDAP/scarter;
5. Click the **To** or **Cc** arrow button to update the **Selected entries** list, and click **OK**.

   **Tip:** To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list.
6. Click **OK**.
7. In the **Subject** box, type the subject of the notification request.
8. In the **Message** box, type text directly.

9. To add links, click **Add links**, select the entries you want, click the arrow button to update the **Selected entries** list, and click **OK**.

   **Tip:** To remove links, select them and click **Remove links**.
10. If you want to set up notification options, click **Advanced**, otherwise move on to step 13.
11. To request an acknowledgement from each recipient to whom the notification is sent, select the **Request Acknowledgement** box.
12. To send an e-mail notification to recipients who do not acknowledge the request by a specified date, and copy each stakeholder, select the **Send notification if not acknowledged by the date** box, and then select the required date.
13. Click **Save**.

## Read and Acknowledge a Notification Request

New notification requests in your task inbox have the status Unread.

You can read the notification request, and if you are a recipient to whom the request was sent, you can acknowledge it, if this is required.

### Procedure

1. View your task inbox.
2. Select the unread notification request you want to read, and view the details in the reading pane.

   The status of the notification request changes to Read.
3. If your username appears in the **To** list, and an acknowledgement is required, click **Acknowledge**.

   The status of the notification request changes to Acknowledged.

   **Note:** If your username appears in the **To** list, you are a recipient of the notification request. If it appears in the **CC** list, you are a stakeholder copied on the request. If there is a deadline set up for the notification request, it is shown in the **Deadline** box.

# Archive Tasks

Archiving is a method of removing unwanted tasks from your inbox.

When you archive a task, it remains active in IBM Cognos Business Intelligence, and other task recipients can continue to work with it. Any notifications associated with an archived task also remain active.

Tasks that are deleted from your archive also remain active, but you can no longer view them.

### Procedure

1. View your task inbox.
2. Select the tasks you want to archive, and then click **Archive** from the **Move to** drop down list.

## View the Task Archive

You can view a list of tasks that you have archived.

## Procedure

View your task inbox, and then click the **Archive** tab.

## What to do next

You can view the details of a task, by selecting it. The task details are shown in the reading pane. If the task contains an attachment, such as a report, you can double-click to view it.

**Tips:**

- To view the due date for tasks instead of the date received, select **Display Due Date** from the **Display Date Received** drop-down list.
- To return to your task inbox, click the **Inbox** tab.
- To delete unwanted tasks, select them, and then click **Delete** .

# Chapter 11. Administering Microsoft Office Documents

Microsoft Office users can import data from IBM Cognos Business Intelligence reports into workbooks, presentations, and documents using IBM Cognos for Microsoft Office and then publish the workbooks, presentations, and documents to the IBM Cognos portal. For more information, see the IBM Cognos for Microsoft Office User Guide and the IBM Cognos Analysis for Microsoft Excel User Guide. IBM Cognos Connection users can then download the workbooks, presentations, and documents for viewing or editing in the Microsoft Office application that was used to create it.

**Note:** The only way to publish Microsoft Office workbooks and presentations in IBM Cognos BI is to use IBM Cognos for Microsoft Office or IBM Cognos Analysis.

Before users can import IBM Cognos BI data into Microsoft Office documents or publish those documents in the IBM Cognos portal, you must deploy the IBM Cognos for Microsoft Office and IBM Cognos Analysis client to the users' workstations.

## Deploying IBM Cognos for Microsoft Office Client

IBM Cognos for Microsoft Office is available for installation with IBM Cognos BI components. After IBM Cognos BI is installed and configured, you can install IBM Cognos for Microsoft Office on client workstations.

IBM Cognos for Microsoft Office Client is available as a 32-bit installation only. It must be installed on a 32-bit Windows computer.

### Deploying IBM Cognos for Microsoft Office to Client Computers

IBM Cognos for Microsoft Office uses Microsoft .NET Framework to allow users to interact with server-based components. Microsoft .NET Framework and the required updates are downloaded and installed by the setup file when you install IBM Cognos for Microsoft Office. The setup file must be run on all user computers.

For a list of supported versions of Microsoft .NET Framework, see the IBM Cognos Customer Center (http://www.ibm.com/software/data/cognos/customercenter/).

Use the following checklist to guide you through the deployment process:

- Install .NET Framework and IBM Cognos for Microsoft Office.

  For more information about installing IBM Cognos for Microsoft Office, see the IBM Cognos for Microsoft Office *Installation Guide*.
- Set the macro security level for Microsoft office XP, if required.
- Install the CA certificate for secure sockets layer support, if required.

### Set Macro Security Level for Microsoft Office XP

For Microsoft Office XP applications to run IBM Cognos for Microsoft Office, you must set your macro security level to an appropriate level. You must set this for Microsoft Office Excel, Microsoft Office Word, and Microsoft Office PowerPoint.

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### Procedure

1. Open your Microsoft Office XP application.
2. From the **Tools** menu, click **Macros**, and then click **Security**.
3. Choose whether to change the security level or the trusted publishers.
   - On the **Security Level** tab, click **Medium** or **Low**, and then click **OK**
   - On the **Trusted Publishers** tab, select **Trust all installed add-ins or templates**, and then click **OK**.

## Install the CA Certificate for the HTTPS Interface to Series 7 PowerPlay

If your environment includes IBM Cognos Series 7 PowerPlay Enterprise Server and you are using the HTTPS (https://) interface to access Series 7 PowerPlay, you must install a certificate issued by a certificate authority (CA). The CA certificate is required for secure sockets layer (SSL) support.

### Procedure

1. Retrieve the CA certificate from your administrator.

   The file has a .cer extension.
2. Double-click the .cer file, click **Install Certificate**, and then click **Next**.
3. Click **Place all certificates in the following store**.
4. Click **Browse**, click **Trusted Root Certification Authorities**, and then click **Next**.
5. Click **Finish**.

# Download a Microsoft Office Document

You can download a Microsoft Office document from IBM Cognos Connection if it was published in IBM Cognos Business Intelligence using IBM Cognos for Microsoft Office or IBM Cognos.

For more information, see the IBM Cognos for Microsoft Office User Guide and the IBM Cognos Analysis for Microsoft Excel User Guide.

### Before you begin

You must have read and traverse permissions to access Microsoft Office documents in IBM Cognos Connection.

### About this task

You can download documents created in Microsoft Office Excel spreadsheet software, Microsoft Office PowerPoint and Microsoft Office Word. The default action for any Microsoft Office document is to download it.

### Procedure

1. In IBM Cognos Connection, locate the document that you want to open.
2. Click **more** on the actions toolbar to the right of the document that you want to download.

   The IBM Cognos Connection actions page opens.
3. Download the Microsoft Office document:

- For a Microsoft Office workbook, click the **View most recent document in Excel** object.
- For a Microsoft Office presentation, click the **View most recent document in PowerPoint** object.
- For a Microsoft Office word document, click the **View most recent document in Word** object.
- For a Microsoft Office document of unknown type, click the **View most recent document** object.

The **File Download** dialog box appears.

4. Click **Open** or **Save** and follow the prompts that appear.

   When you open the document, it opens in the application that was used to create it.

## Results

You can now perform the same actions that you would perform for any Microsoft Office document of the selected type.

# Chapter 12. Schedule Management

You can schedule IBM Cognos entries to run at a time that is convenient for you. For example, you may want to run reports or agents during off hours when demands on the system are low. Or you may want to run them at a regular weekly or monthly interval.

To use this functionality, you must have the required permissions for the **Scheduling** secured function in **IBM Cognos Administration**.

You can schedule entries to run at specified intervals. You can schedule entries individually or use jobs to schedule multiple entries at once. Jobs have their own schedules independent from report schedules.

You can schedule entries to run on the last day of each month. You can also schedule entries to be triggered by occurrences, such as database refreshes or emails.

You can run reports to produce outputs based on the options that you define, such as format, language, and accessibility.

Only one schedule can be associated with each entry. If you require multiple schedules for a report or agent entry, you can create report views "Create a Report View" on page 79 or agent views "Create an Agent View" on page 142 and then create a schedule for each view.

After you create a schedule, the entry or job runs at the time and date specified. You can then view the scheduled entries and manage them. For more information, see Chapter 13, "Activities Management," on page 173.

## Credentials for Scheduled Entries

When you open a scheduled entry, the credentials show the current schedule owner. If you are not already the schedule owner, you can name yourself the owner "Example - Change the Credentials for a Schedule" on page 168.

Credentials for a schedule do not change automatically when you modify a schedule. You must explicitly change the credentials.

For information on data source credentials, see "Trusted Credentials" on page 50.

## Prompts in Scheduled Entries

If an entry that contains prompts is scheduled, you must save the prompt values or specify default values "Specify the Default Prompt Values for a Report" on page 86 to ensure that values exist when the report runs according to the schedule.

In a job, you can specify prompt values for job steps. When an entry runs as part of a job, the prompt values saved in the job definition are used instead of the values saved with the entry. If no values are specified in the job definition, IBM Cognos software uses the values saved in the entry.

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### Priority for Scheduled Entries

When you schedule an entry, you may be able to select a run priority from 1 to 5. For example, an entry with priority 1 runs before an entry with priority 5. If there is more than one entry with a specific priority, the one that arrived in the queue first runs first. The default is 3. If you do not have permissions for entry priorities, the priority appears but you can not change it.

When you schedule a job, you can set priority for the whole job only, not for individual entries within a job. However, you can change the priority of individual entries when they are pending in the queue.

The priority of entries in the queue does not affect an entry that is already running. The running entry completes and then the queue priority is checked for the next entry to run.

For more information, see "Manage Entry Run Priority" on page 180.

### Run Histories for Scheduled Entries

IBM Cognos software keeps history information each time a scheduled entry runs. You can use the run history for an entry to see the times at which it ran and whether the it ran successfully. For more information, see "View the Run History for Entries" on page 181.

## Schedule an Entry

You schedule an entry to run it at a later time or at a recurring date and time. For example, you can schedule a report or an agent.

If you no longer need a schedule, you can delete it. You can also disable it without losing any of the scheduling details. You can then enable the schedule at a later time. For more information, see Chapter 13, "Activities Management," on page 173.

You can schedule an entry to run on the last day of each month "Example - Schedule an Entry on the Last Day of the Month" on page 167 or as part of a job "Use Jobs to Schedule Multiple Entries" on page 168. You can schedule reports based on trigger occurrences "Trigger-based Entry Scheduling" on page 170.

To use this functionality, you must have the required permissions for the **Scheduling** secured function in **IBM Cognos Administration**.

To schedule an entry, you need the permissions that are required to run the entry. For example, to schedule a report or report view, you must have read, write, execute, and traverse permissions for it. To schedule a child report view, you must have execute permissions on the parent report. You also require the following access permissions for any data sources used by the report:

- dataSource - Execute and Traverse
- dataSourceConnection - Execute and Traverse

  With only Execute access, you are prompted to log on to the database.
- dataSourceSignon - Execute

If you want, you can change the current schedule owner by changing the credentials for a scheduled entry. For more information, see "Example - Change the Credentials for a Schedule" on page 168.

### Procedure

1. In IBM Cognos Connection, click the schedule button for the entry you want to schedule .
2. Set the priority for the scheduled entry.

   Select a lower number for higher priority. The default is 3.
3. Under **Frequency**, select how often you want the schedule to run.

   The **Frequency** section is dynamic and changes with your selection. Wait until the page is updated before selecting the frequency.

   If you specify intraday scheduling in the **Frequency** section, you can also select a daily frequency for your scheduled entries. Proceed to step 4.

   If you did not specify intraday scheduling, proceed to step 5.
4. Under **Daily frequency**, select how often you want the schedule to run each day. You can choose to schedule an entry either by the minute or by the hour.

   When you specify a daily frequency, you also have the option to select a time period when you want the entry to run during the day, for example, between 9:00 am and 5:00 pm. This way, you can restrict the running of entries to periods during the day when updates are required.
5. Under **Start**, select the date when you want the schedule to start.
6. Under **End**, select when you want the schedule to end.

   **Tip**: If you want to create the schedule but not apply it right away, select the **Disable the schedule** check box. To later enable the schedule, clear the check box.
7. If additional options are available on the **Schedule** page, specify what you want.

   For example, for reports, you can select formats, languages, delivery method (including how to save report output files), and prompt values.
8. Click **OK**.

### Results

A schedule is created and the report runs at the next scheduled time.

## Example - Schedule an Entry on the Last Day of the Month

You want to schedule a financial report to run automatically on the last day of each month for the next year.

### Procedure

1. In IBM Cognos Connection, click the schedule button for the entry you want to schedule .
2. Under **Frequency**, select **By Month**, and then select **Day**.
3. Enter **Day** 31 **of every** 1 **month(s)**.

   Entering 31 as the day ensures that the entry runs on the last day of the month, regardless of how many days are in the month.
4. Under **Start**, select the last day of the current month as the day you want the monthly schedule to start.
5. Under **End**, click **End by** and select the last day of the same month next year as the day you want the monthly schedule to end.
6. Click **OK**.

## Example - Change the Credentials for a Schedule

You want to change the credentials for a schedule to identify you as the current schedule owner.

### Procedure

1. Log on to IBM Cognos Connection using your user ID and password.
2. In the Cognos Connection portal, click the schedule button for the entry for which you want to change the credentials.

   Under **Credentials**, the name of the current schedule owner appears.
3. Click the **Use my credentials** link to make you the schedule owner. Save your changes.

   The next time that you open the schedule, your credentials identify you as the schedule owner of the schedule, for example, Sam Carter (scarter).

   **Note:** If you are logged on as an anonymous user, information about the current schedule owner is not available.

## Use Jobs to Schedule Multiple Entries

You can set the same schedule for multiple entries by creating a job. A job identifies a collection of reports, report views, and other jobs that are scheduled together and share the same schedule settings. When a scheduled job runs, all the entries in the job run.

If a job item is unavailable, you can select a different link by clicking **Link to an entry**.

Jobs contain steps, which are references to individual reports, jobs, and report views. You can specify whether to run the steps all at once or in sequence.

- When steps are run all at once, all the steps are submitted at the same time. The job is successful when all the steps run successfully. If a step fails, the other steps in the job are unaffected and still run, but the job has a **Failed** status.
- When the steps are run in sequence, you can specify the order in which the steps run. A step is submitted only after the preceding step runs successfully.You can choose to have the job stop or have the other steps continue if a step fails.

You can schedule a job to run at a specific time, on a recurring basis, or based on a trigger, such as a database refresh or an email “Trigger-based Entry Scheduling” on page 170.

The individual reports, jobs, and report views in steps can also have individual schedules. Run options for individual step entries override run options set for the job. You can set run options for the job that serve as the default for step entries that do not have their own run options.

You can run reports to produce outputs based on the options that you define, such as format, language, and accessibility.

Permissions required to include an entry as part of a job vary depending on the type of entry. The permissions are the same as for scheduling an entry “Schedule an Entry” on page 166.

## Procedure

1. In IBM Cognos Connection, click the new job button .
2. Type a name and, if you want, a description and screen tip for the job, select the location in which to save the job, and then click **Next**.

   The **Select the steps** page appears.
3. Click **Add**.
4. Select the check boxes for the entries you want to add and click the right arrow button . When the entries you want appear in the **Selected entries** box, click **OK**.

   You can also click **Search**, and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. When you find the entry you want, click the right arrow button to list the entry in the **Selected entries** box and click **OK**.

   To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.
5. If you want to change run options for an individual entry when it runs as part of the job, click the set icon , click **Produce report outputs**, select the **Override the default values box**, make the changes, and click **OK**.

   To send the report to mobile recipients, select **Send the report to mobile recipients** and click **Select the recipients**.

   **Tip:** To return to defaults for individual entries, click the delete button.
6. If you want to refresh the cache for a report when the job runs, click the edit icon next to the report, and then from the **Run the report to** menu, click **Refresh the report cache**. Click **Override the default values**. To accept the displayed language, click **OK**. To change the language, click **Select the languages**, select the languages you want, and then click **OK**. Click **OK** to accept the displayed languages.

   **Tip:** To clear the cache, click the delete button.
7. If you want to create or refresh the cache, click the set icon, click **Refresh the report cache**, select the **Override the default values box**, add languages, if you want, and click **OK**.

   **Tip:** To clear the cache, click **More** next to the report whose cache you want to clear, click **Clear the cache**, and click **OK** twice.
8. Under **Submission of steps**, select whether to submit the steps **All at once** or **In sequence**.

   If you select **In sequence**, the steps are executed in the order they appear in the **Steps** list. If you want the job to continue to run even if one of the steps fails, select the **Continue on error** check box.

   **Tip:** To change the order, click **Modify the sequence**, make the changes, and click **OK**.
9. If you want to specify default run options at the job level, under **Defaults for all steps**, click **Set**.

   Note that the run options that are available for a job with multiple entries may not apply to every entry. If the option does not apply to an entry, it is ignored.

10. If you want to override defaults, select the category and select the **Override the default values** check box and select the default options you want for the job and click **OK**.
11. To save the complete history details for the job steps when the run activity completes successfully, click **All** from the Run history details level list. Click **Limited** to save limited run history details for the job. If the job run fails, the complete history details are saved.

    The default is **All**.
12. Select the action you want:
    - To run now or later, click **Run now or at a later time** and click **Finish**. Specify the time and date for the run. Click **Find only** or **Find and fix**, then click **Run**. Review the run time and click **OK**.
    - To schedule at a recurring time, click **Schedule to run at a recurring time** and click **Finish**. Then, select frequency and start and end dates. Click **Find only** or **Find and fix**, then click **OK**.

      **Tip:** To temporarily disable the schedule, select the **Disable the schedule** check box. To view the schedule status, see Chapter 13, "Activities Management," on page 173.
    - To save without scheduling or running, click **Save only** and click **Finish**.

### Results

A job is created and will run at the next scheduled time.

## Cached Prompt Data

For reports that prompt for values each time that the report is run, you may want to use cached prompt data. Reports run faster because data is retrieved from the cache rather than from the database.

The cache is used only when a requested language is the same as one in the cache. For example, the cache contains data for English, English (United States), and German (Germany). When prompted, you request English (United States) for the report. There is an exact match and the cached data is used. The cached data is also used when there is a partial match. If you request English (Canada), the cached data for English is used. If you request German (Austria), there is no match and the cached data is not used.

You can use caches for reports or report views. For report views, the report view cache is used first. If no report view cache is found, the cache for the associated report is used.

You must use a job to create or refresh a cache. You can refresh the cache automatically by scheduling the job to run periodically. If you want to use live data the next time that you run the report, you can clear the cache.

# Trigger-based Entry Scheduling

You can schedule entries based on an occurrence, such as a database refresh or an email. The occurrence acts as a trigger, causing the entry to run. For example, you may want to run a report every time a database is refreshed.

Trigger-based scheduling may be used to run entries automatically based on an occurrence. It may also be used to limit when users can run entries. For example,

in a warehouse environment where the database is refreshed only once a week, there is no need to run reports more frequently.

Trigger-based scheduling applies only to the entry, not to any entry view associated with it. For example, if trigger-based scheduling applies to a report, it does not apply to report views associated with the report. However, you can schedule a report view using a trigger.

## Setting Up Trigger-based Scheduling

To schedule an entry based on an occurrence and confirm trigger-based scheduling, you must have read, write, execute, and traverse permissions.

You also require the following access permissions for all data sources used by the entry.

| Data source | Permissions |
|---|---|
| dataSource | Execute and Traverse |
| dataSourceConnection | Execute and Traverse<br><br>With only Execute access, you are prompted to log on to the database. |
| dataSourceSignon | Execute |

Before setting up trigger-based scheduling, ensure that your credentials exist and are up to date.

**Tip:** Click the my area options button , **My Preferences**, and, on the **Personal** tab, click **Renew the credentials**.

Follow this process to set up trigger-based scheduling:

- Schedule an entry based on the occurrence "Schedule an Entry Based on an Occurrence."
- Have your administrator set up the trigger occurrence on a server.

Trigger occurrences can also be set up by a Software Development Kit developer using the IBM Cognos Software Development Kit. For more information, see the *Software Development Kit Developer Guide*.

## Schedule an Entry Based on an Occurrence

As part of setting up trigger-based scheduling, you must schedule an entry based on an occurrence.

Trigger-based schedule is activated if the user firing the trigger has:

- read and traverse permissions for the schedule entry
- traverse permissions for all ancestors of the schedule entry
- access to IBM Cognos Administration

## Procedure

1. In IBM Cognos Connection, click the schedule button next to the entry you want to schedule.
2. Under Frequency, click the **By Trigger** tab.
3. In **Trigger name**, type the name of the trigger occurrence.

   **Note:** The trigger name that you enter may be provided to you by your administrator or developer. If not, you must inform your administrator or developer of the trigger name that you use.
4. The default start date is "now", and the default end date is "forever", which means the trigger schedule runs when the trigger is fired (either from trigger.bat or from an Software Development Kit application). If you enter a valid start and end date, the trigger schedule can only be fired between those dates.
5. Click **OK**.

# Chapter 13. Activities Management

You can manage IBM Cognos activities from **My Activities and Schedules** in IBM Cognos Connection.

You can view a list of your activities that are current, past, upcoming on a specific day, or scheduled. You can filter the list so that only the entries that you want appear. A bar chart shows you an overview of daily activities, by hour. You can use the chart to help choose the optimum date for rescheduling activities.

You can set run priority for entries. You can also view the run history for entries, specify how long to keep run histories, and rerun failed entries.

If you switch views, you must refresh to see current data. For example, if you switch from **Past Activities** to **Upcoming Activities**, you must refresh to see current data in the panes.

To access **My Activities and Schedules** in IBM Cognos Connection, you must have the required permissions for the **Run activities and schedules** capability.

## Manage Current Activities

Current activities are entries that are currently being processed in IBM Cognos software.

Each entry is listed by name and shows the request time, the status, and the priority for background activities. The bar chart shows the total number of entries, broken down by the number of pending, executing, waiting, and suspended entries. When the activity is processing, the process number is displayed.

You can sort the **Request time**, **Status**, and **Priority** columns. You can choose to view a list of background activities or interactive activities.

For entries that are being processed in the background, you can click **Show Details** to see more information. For each entry, this displays **Last Execution Response Time** and **Path**, for example, Public Folders > Samples > Cubes > Great Outdoor Sales (cube).

You can suspend background entries and release them later when you want them to run. You can permanently cancel runs for entries that have one of the following statuses:

- pending in the queue
- executing
- suspended
- waiting for a process external to IBM Cognos software to complete

You can filter the entries to display only those you want. You can choose to display only those entries with a specific status or priority, or entries of a specific type or scope.

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If you cancel an entry that contains other entries, such as a job or an agent, steps or tasks that have not yet been completed are canceled. However, steps or tasks that have already completed remain completed.

You can change the priority of entries “Manage Entry Run Priority” on page 180 and view the run history “View the Run History for Entries” on page 181.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area button , click **My Activities and Schedules**, and in the left pane, click **Current Activities**.
2. In the **Filter** section, click the filtering items that you want to use.

   **Tip:** If you want to use advanced filtering options, click Advanced options. To reset all selections to the default settings, click Reset to default.
3. Click **Apply**.

   The list shows the entries that you selected.
4. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

   **Tip:** To select all entries, click the check box in the upper left-hand corner, next to Name.

| Goal | Icon |
|---|---|
| Show Details (top right-hand corner) | |
| Hide Details (top right-hand corner) | |
| Cancel the run (**Actions** menu beside entry) | |
| Suspend the run (**Actions** menu beside entry) | |
| Run suspended entries (**Actions** menu beside entry) | |
| Set Priority (**Actions** menu beside entry) | |

## Manage Past Activities

Past activities are entries that have finished processing in IBM Cognos software.

Each entry is listed by name and shows the request time and the status. You can sort the **Request time** and **Status** columns. The bar chart shows the total number of entries, broken down by status. If an entry has failed, a button appears showing the severity of the error.

You can filter the entries to display only those you want. You can choose to view a list of activities that occurred over a specified length of time, such as the last four hours or the last day, or you can specify a date or time range. You can filter by status, type, and scope.

You can view the run history "View the Run History for Entries" on page 181.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area button , click **My Activities and Schedules**, and in the left pane, click **Past Activities**.
2. In the **Filter** section, click the filtering items that you want to use.

   **Tip:** If you want to use advanced filtering options, click Advanced options. To reset all selections to the default settings, click Reset to default.
3. If an error occurred when the entry ran, pause over the error button next to the status to see the severity of the error.
4. Click **Apply**.

   The list shows the entries that you selected.
5. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, click one of the following buttons on the toolbar.

| Goal | Icon |
|---|---|
| Show Details (top right-hand corner) | |
| Hide Details (top right-hand corner) | |

## Manage Upcoming Activities for a Specific Day

You can choose to view a list of all upcoming activities that are scheduled for a specific day.

Each entry is listed by name and shows the request time and the priority. A bar chart show the total number of scheduled and canceled entries for each hour of the day. The chart legend shows the total number of scheduled and canceled entries for the day.

You can sort the **Request time**, **Status**, and **Priority** columns. You can choose to view a list of background activities or interactive activities.

You can click **Show Details** to see more information. For each entry, this displays **Last Execution Response Time** and **Path**, for example, Public Folders > Samples > Cubes > Great Outdoor Sales (cube).

You can filter the entries to display only those you want. You can choose the date and time for which you want to view upcoming activities. You can filter by status, priority, type, and scope.

You can also change the priority of an entry in the queue "Manage Entry Run Priority" on page 180.

## Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area button , click **My Activities and Schedules**, and in the left pane, click **Upcoming Activities**.
2. In the **Filter** section, click the filtering items that you want to use.

   **Tip:** If you want to use advanced filtering options, click Advanced options. To reset all selections to the default settings, click Reset to default.
3. Click **Apply**.

   After applying the filter,
   - The list shows the entries that you selected.
   - The filter status line shows the criteria used to generate the list.
   - The bar chart shows the scheduled and canceled entries by hour for the specified day.

   The list of entries, filter status line, and chart are updated whenever you redefine the filter and click Apply. The list of entries and filter status line do not change when you browse the chart to a different date.
4. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

   **Tip:** To select all entries, click the check box in the upper left-hand corner, next to **Name**.

| Goal | Icon |
|---|---|
| Show Details (top right-hand corner) | |
| Hide Details (top right-hand corner) | |
| Cancel the run (**Actions** menu beside entry) | |
| Suspend entries (**Actions** menu beside entry) | |

| Goal | Icon |
| --- | --- |
| Run suspended entries (**Actions** menu beside entry) | |
| Re-schedule a run that was canceled (**Actions** menu beside entry) | |
| Set Priority (**Actions** menu beside entry) | |

## Manage Suspended Activities

You can suspend entries to respond to system requirements and resume them later.

After suspending entries, you can view a list of entries that are suspended indefinitely.

You can resume suspended entries even after the original execution time has lapsed. For example, if you schedule a report for 9:00 am, then suspend it, you can restart the report at 9:30 am.

The upcoming activities bar chart helps you determine when to reschedule entries. By browsing the upcoming dates in the chart, you can see the number of entries for a specific day. When you pause the pointer over a specific hour in the day, you can find the number of entries for that hour. Use this to find a date when demand is low and reschedule the entry to that date. The chart columns show the total number of scheduled and canceled entries for each hour of the day. The chart legend shows the total number of scheduled, canceled, and suspended entries for the day.

### Suspend entries

You can suspend activities.

For example, if your system tends to be overloaded at certain times, you can reduce the workload and avoid bottlenecks during these peak times by suspending entries indefinitely or rescheduling them for a later time.

#### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area button , click **My Activities and Schedules**, and in the left pane, click **Upcoming Activities**.
2. In the **Filter** section, for **Day** select a date, and for **Status** click **Scheduled**.
3. Click **Apply**.

   The list shows the scheduled entries for the selected date. Because entries are backlogged on that date, you want to suspend certain entries indefinitely and reschedule others. You want to browse the upcoming dates in the chart and choose another date for the suspended entries.

4. In the chart, click the next and previous icons to browse the upcoming dates. The chart shows both scheduled and canceled entries for each day by hour.

   **Important:** The list of entries that appear below the chart does not change to match the date you select in the chart. The list of entries matches your specified filter criteria and does not change until you specify and apply a new filter.
5. In the list of scheduled entries, select the check box next to the entries that you want to suspend and click the suspend button on the toolbar. In the **Suspend Activity** dialog box,
   - to suspend entries indefinitely, click **Indefinitely**.
   - to reschedule entries to another date, click **Until**, and select a date and time.

   Note that both the chart and the list of entries refresh, and the suspended entries no longer appear in the list of entries.

   **Tip:** To suspend an individual entry, click the arrow to the right of the entry and click **Suspend**.

## View a list of suspended entries for a specific day

You can view a list of suspended entries for a specific day.

### Procedure

1. In the **Filter** section for upcoming activities, under **Day** select a date, and under **Status** click **Suspended**.
2. Click **Apply**.

   The list shows the suspended entries for that day.

   You can run, cancel, or reschedule suspended entries. To perform an action on an individual entry, click the arrow to the right of the entry and select the action that you want. To perform an action on several entries, select the check box for the entries you want, and then click the appropriate button on the toolbar.

   **Note:** To select all entries, click the check box in the upper left-hand corner, next to **Name**.

| Goal | Icon |
|---|---|
| Show Details (top right-hand corner) | |
| Hide Details (top right-hand corner) | |
| Cancel the run (**Actions** menu beside entry) | |
| Suspend entries (**Actions** menu beside entry) | |
| Run suspended entries (**Actions** menu beside entry) | |

| Goal | Icon |
| --- | --- |
| Re-schedule a run that was canceled (**Actions** menu beside entry) | |
| Set Priority (**Actions** menu beside entry) | |

## Manage Scheduled Activities

You can view a list of scheduled entries.

Each entry is listed by name, status, and priority. A bar chart shows you an overview of activities broken down by enabled and disabled schedules.

You can filter the entries to display only those you want. You can choose to display only the entries with a specific status or priority, or entries of a specific type or scope.

You can set properties, run the schedule once, disable and enable scheduled entries, modify the schedule, remove the schedule, set the priority "Manage Entry Run Priority" on page 180, and view the run history "View the Run History for Entries" on page 181. Depending on the entry, you may also be able to perform other functions, such as view outputs or event lists.

For more information on schedules, see Chapter 12, "Schedule Management," on page 165.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area button , click **My Activities and Schedules**, and in the left pane, click **Schedules**.
2. In the **Filter** section, click the filtering items that you want to use.

   **Tip:** If you want to use advanced filtering options, click Advanced options. To reset all selections to the default settings, click Reset to default.
3. Click **Apply**.

   The list shows the entries that you selected.
4. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

   **Tip:** To select all entries, click the check box in the upper left-hand corner, next to **Name**.

| Goal | Icon |
| --- | --- |
| Show Details (top right-hand corner) | |

| Goal | Icon |
| --- | --- |
| Hide Details (top right-hand corner) | |
| Enable the schedule (**Actions** menu beside entry) | |
| Disable the schedule (**Actions** menu beside entry) | |
| Set Priority (**Actions** menu beside entry) | |

## Manage Entry Run Priority

You can assign a priority of 1 to 5 to scheduled entries.

For example, an entry with priority 1 runs before an entry with priority 5. If there is more than one entry with the same priority, the one that arrived in the queue first runs first. The default priority is 3.

Interactive entries always run immediately and priority cannot be changed once they are running.

You set the priority for an entry when you schedule it Chapter 12, “Schedule Management,” on page 165. When an entry is in the current, upcoming, or scheduled queue, you can change the priority.

You may want to set a low priority for entries that take a long time to run so that other entries in the queue are not delayed.

When you schedule a job “Use Jobs to Schedule Multiple Entries” on page 168, you set the priority for the whole job, not for individual entries within the job. You may want to set a low priority for a job with many entries so that other entries in the queue are not delayed.

You schedule priority for the parent job. When the job runs, all the child entries inherit the priority of the parent. When the job is in the queue and is not yet running, you can update the priority. You cannot do this for the individual entries in the job. Changing the priority of the job changes the priority of all its child entries. You can view the run history of a job “View the Run History for Entries” on page 181 while it is executing and see which of its entries have completed, are executing, or are pending.

The priority of entries in the queue does not affect an entry that is already running. That entry completes and then the queue priority is checked for the next entry to run.

### Before you begin

You must have the **Run activities and schedules** capability to manage entry run priority.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area button , click **My Activities and Schedules**, and in the left pane, click **Current Activities**, **Upcoming Activities**, or **Schedules**.
2. To change the priority for one entry, click the arrow to the right of the entry and select **Set Priority**. To change the priority of more than one entry, select the check box for the entries you want and then click the set priority button on the toolbar.

   **Tip:** To select all entries, click the check box in the upper left-hand corner, next to Name.
3. From the menu, click the priority that you want, and then click **OK**. If you selected one entry, the current priority of the entry appears in the **Set the priority** box. If you selected multiple entries, the **Set the priority** box contains **(Multiple)**.

### Results

The new priority appears in the **Priority** column next to the entries that you selected.

## View the Run History for Entries

You can view the run history of entries that are scheduled to run in the background, without anyone waiting to view them.

This includes scheduled entries that are run once and saved, and interactive entries that are saved or mailed. Interactive entries do not have run histories.

IBM Cognos software keeps history information each time an entry runs in the background. The run history for an entry includes information such as the request time, start time, completion time, and whether the report ran successfully.

You can look at a more detailed run history for the entry, which includes general, error, and warning messages related to the entry and any actions you can take. If there is any email associated with the entry, the status of the email delivery is included.

Some types of entries display additional information in the detailed run history page:

- For reports, a report output version "View Report Output Versions" on page 90 is kept each time a report is run according to a schedule. You can view the report output version from the detailed run history.
- For jobs and agents, you can view a list of steps and see a detailed run history for each one. You can also see the parts of the job or agent that have not yet completed. If the entry is part of a parent entry, you can view the parent entry that initiated the run.
- For human tasks contained within an agent, you can view a list of steps and see a detailed run history for each one.

- For index update tasks, you can view the IBM Cognos Connection folder or package that is indexed. You can view the scope of the index, either all entries or only entries that have changed. You can also view the type of data collected for indexed entries.

You can rerun failed entries "Rerun a Failed Entry Task" on page 183 from the detailed run history page. You can view a list of related runs that are part of the rerun series and see a detailed run history for each one. You can specify how many run history occurrences to keep or for how long to keep them "Specify How Long to Keep Run Histories."

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area button , click **My Activities and Schedules**, and in the left pane, click **Schedules** or **Past Activities**.
2. Next to the entry, click the arrow and then click **View run history** .
3. If you want, select the **Status** of entries that you want to view.

   A list of selected entries appears.
4. If you want to view the run history details, in the **Actions** column, click the view run history details button next to the entry you want. Then, if you want, from the **Severity** list, select the severity of the entries.

   Under job steps, the complete run history details is shown. If the job run history details level was set to **Limited**, no history details for the jobs steps are recorded.
5. If there is a report output version, in the **Actions** column, click the view outputs button for the entry you want. Then, from the **Versions** list, click the version you want. To delete a version, click **Manage versions** click the check box for the version, and then click **Delete**.

## Specify How Long to Keep Run Histories

You can keep run histories for a specific number of runs or for a specific number of days or months.

For example, you can keep the run histories for the ten latest runs (occurrences) or for the past two days or six months. You can also choose to keep all run histories.

### Before you begin

You must have read and write permissions for the entry and read or traverse permissions for the folder that contains the entry.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area button , click **My Activities and Schedules**, and in the left pane, click **Current Activities**, **Upcoming Activities**, or **Schedules**.

2. Click the set properties button next to the entry you want.
   The entry properties page appears.
3. On the **General** tab, under **Run history** on the bottom-left side of your screen, choose the retention method and type the value:
   - To keep run histories for a specific number of occurrences, click **Number of occurrences** and type the number. To save an unlimited number of run histories, set this value to 0.
   - To keep run histories for a specific length of time, click **Duration** and click either **Days** or **Months**. Type the appropriate value in the box.
4. Click **OK**.

## Rerun a Failed Entry Task

You can resubmit a failed entry.

When an entry, such as a report, agent task, or job, runs according to a schedule or runs in the background and the fails, you can resubmit the failed entry with the same options that were specified in the original run.

For a job that contains steps that ran successfully and steps that did not run successfully, you are not required to rerun the entire job but only the individual job steps. If the job steps are run sequentially, you can rerun the job starting with the failed job step. If you wish, you can select which steps to rerun and skip the failed steps. However, the selected job steps run sequentially and if a step fails, then the steps that occur after the failed step are not run.

When you rerun a job step individually, a new run history that includes only the single job step is created for the parent job. For more information about run histories, see "View the Run History for Entries" on page 181.

When rerunning an agent entry, associated tasks, such as an email that sends report output to a list of email recipients, are also rerun if they failed initially. If there are two associated tasks running in parallel and one task fails and one succeeds, rerunning the agent only reruns the failed task. However, if tasks are selected to run on failure, they are run again when the rerun fails.

Although the run history shows entries that ran successfully, you cannot rerun an entry that succeeded. The run options are not stored for these entries.

A rerun can fail when a task associated with a failed entry is deleted or updated.

### Before you begin

You must have execute permissions to rerun a failed task.

### Procedure

1. In IBM Cognos Connection, in the upper-right corner, click the my area button , click **My Activities and Schedules**, and in the left pane, click **Past Activities**.

2. Next to the entry, click the arrow and then click **View run history details** .

   The **View run history details** page shows run details, such as start time and completion time, run status, and error messages for a failed run. Other information that appears in the page depends on whether the entry is for a single task, a job with multiple steps, or an agent with tasks. For example, if it is a single task, the report options and the report outputs appear. If it is a job with multiple steps, a **Job** section appears with the run details of the job steps.
3. Under **Status**, next to **Failed**, click **Rerun**.
   - If the rerun task is a single task, you receive a message asking you to confirm the rerun.
   - If the rerun task is a job with multiple job steps or an agent with tasks, the **Rerun** page appears. Select the check box next to the entries you want to rerun.

   **Tip:** You can also rerun failed entries by clicking Rerun in the Outstanding to complete section. To rerun a single job step, in the Job section, in the Actions column, click the view run history details button for the failed step.

# Chapter 14. IBM Cognos Business Insight

IBM Cognos Business Insight is a new report consumption environment that provides an integrated Business Intelligence experience for business users. This Web-based tool allows you to use IBM Cognos content and external data sources to build sophisticated, interactive workspaces. For more information about IBM Cognos Business Insight, see the IBM Cognos Business Insight *User Guide*.

Alternatively, you can create dashboards using pages and portlets in IBM Cognos Connection. For more information, see Chapter 5, "Pages and Dashboards," on page 53.

## Launching IBM Cognos Business Insight

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

You can launch Business Insight using the following methods:

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

## Browser chrome

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

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# Glossary

This glossary includes terms and definitions for IBM Cognos Business Intelligence.

The following cross-references are used in this glossary:

- See refers you from a term to a preferred synonym, or from an acronym or abbreviation to the defined full form.
- See also refers you to a related or contrasting term.

To view glossaries for other IBM products, go to www.ibm.com/software/globalization/terminology.

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## A

**access permission**
A privilege that permits the access or use of an object.

**accountability scorecard**
A scorecard that Metric Studio automatically builds for each user which contains the metrics and projects they own.

**agent** A process that performs an action on behalf of a user or other program without user intervention or on a regular schedule, and reports the results back to the user or program.

**alias** An alternative name used instead of a primary name.

**anonymous access**
A type of access that allows users and servers to access a server without first authenticating with it.

**application tier component**
For installation, the set of processors that access the query databases to gather information and then render the results as PDF and HTML reports and metrics. Application tier components also pass requests to Content Manager and render the results that Content Manager retrieves from the content store.

**attribute**
In BI Modeling, a characteristic of an entity which is descriptive rather than a unique identifier or an aggregative measure.

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

**authentication provider**
The communication mechanism to an external authentication source. Functionalities, such as user authentication, group membership, and namespace searches, are made available through authentication providers.

## B

**burst** To create several report results by running a single report once. For example, the user can create a report that shows sales for each employee, and run it once, sending different results to regional managers by bursting on region.

**burst key**
The dimension or level of a query in the report specification that is used to create, or burst, a set of report results.

## C

**CA** See certificate authority.

**calculated member**
A member of a dimension whose measure values are not stored but are calculated at run time using an expression.

**canvas**
An area within a dashboard or workspace that users interact with to create, view, and manipulate content and data.

**capability**
A group of functions and features that

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can be hidden or revealed to simplify the user interface. Capabilities can be enabled or disabled by changing preference settings, or they can be controlled through an administration interface.

**cardinality**

1. For relational data sources, a numerical indication of the relationship between two query subjects, query items, or other model objects.

2. For OLAP data sources, the number of members in a hierarchy. The cardinality property for a hierarchy is used to assign solve orders to expressions.

**cascading prompt**
A prompt that uses values from a previous prompt to filter the values in the current prompt or pick list.

**certificate**
In computer security, a digital document that binds a public key to the identity of the certificate owner, thereby enabling the certificate owner to be authenticated. A certificate is issued by a certificate authority and is digitally signed by that authority. See also certificate authority.

**certificate authority (CA)**
A component that issues certificates to each computer on which components are installed.

**CGI** See Common Gateway Interface.

**cipher suite**
The combination of authentication, key exchange algorithm, and the Secure Sockets Layer (SSL) cipher specification used for the secure exchange of data.

**class style**
A combination of formatting characteristics, such as font, font size, and border, that the user names and stores as a set.

**CM** See Content Manager.

**Common Gateway Interface (CGI)**
An Internet standard for defining scripts that pass information from a web server to an application program, through an HTTP request, and vice versa.

**condition**
An expression that can be evaluated as true, false, or unknown. It can be expressed in natural language text, in mathematically formal notation, or in a machine-readable language.

**constraint**

1. A security specification that denies one or more users the ability to access a model component or to perform a modeling or authoring task.

2. A restriction on the possible values that users can enter in a field.

**contact**
A named e-mail address to which reports and agent e-mails can be sent. Contacts are never authenticated.

**content locale**
A code that is used to set the language or dialect used for browsers and report text, and the regional preferences, such as formats for time, date, money, money expressions, and time of day.

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

**content store**
The database that contains the data needed to operate, such as report specifications, published models, and security rights.

**credential**
A set of information that grants a user or process certain access rights.

**cube** A multidimensional representation of data needed for online analytical processing, multidimensional reporting, or multidimensional planning applications.

**custom set**
In Analysis Studio, a named object which can include filter rules, calculations, and sort rules. Custom sets can define a set of members that is different from any set originally defined in the cube model. See also predefined set, set.

## D

**dashboard**
A web page that can contain one or more widgets that graphically represent business data.

**data source**
The source of data itself, such as a database or XML file, and the connection information necessary for accessing the data.

**data source connection**
The named information that defines the type of data source, its physical location, and any sign-on requirements. A data source can have more than one connection.

**data tree**
Within a studio, a structure that contains objects such as query subjects, query items, dimensions, levels, and members. A data tree is used as a palette of the available data that can be inserted into calculations, filters, display areas, and other authoring gestures.

**deployment**
The process of moving an application (such as a report or model) to a different instance. For example, reports are often created in a test environment and then deployed to production. When an application is deployed, it is exported, transferred, and imported.

**deployment archive**
A file used for deployment. A deployment archive contains the data from the content store that is being moved.

**deployment specification**
A definition of what packages to move (deploy) between source and target environments, the deployment preferences, and the archive name. Deployment specifications are used for import and export.

**derived index**
A calculated metric that provides a status and a score based on other metrics.

**details-based set**
A set based on an item and its immediate details. See also set.

**dimension**
In Cognos BI and TM1®, a broad grouping of descriptive data about a major aspect of a business, such as products, dates, or locations. Each dimension includes different levels of members in one or more hierarchies and an optional set of calculated members or special categories.

**dimensional data source**
A data source containing data modeled using OLAP concepts, including dimensions, hierarchies, and measures.

**drill down**
In a multidimensional representation of data, to access information by starting with a general category and moving downwards through the hierarchy of information, for example from Years to Quarters to Months.

## E

**event** A change to a state, such as the completion or failure of an operation, business process, or human task, that can trigger a subsequent action, such as persisting the event data to a data repository or invoking another business process.

**event key**
A combination of data items that uniquely defines an event instance. Identifying an event instance enables the agent to determine if it is new, ongoing or stopped.

**event list**
The set of detected event instances evaluated by the task execution rules to determine which agent tasks should be performed.

## F

**fact** See measure.

## G

**gateway**
An extension of a web server program that transfers information from the web server to another server. Gateways are often CGI programs, but may follow other standards such as ISAPI and Apache modules.

**glyph** The actual shape (bit pattern, outline) of a character image. For example, italic A and roman A are two different glyphs representing the same underlying

character. Strictly speaking, any two images which differ in shape constitute different glyphs. In this usage, glyph is a synonym for character image, or simply image (The Unicode Standard – Version 1.0).

**group** A collection of users who can share access authorities for protected resources.

**grouping**
In reporting, the process of organizing common values of query items together and only displaying the value once.

## H

**hierarchy**
The organization of a set of entities into a tree structure, with each entity (except the root) having one or more parent entities and an arbitrary number of child entities.

## I

**information card**
A display of high-level information about dashboard, workspace, or report content, such as owner, contact information, date modified, and an optional thumbnail view of the dashboard, workspace, or report.

**information pane**
In Analysis Studio, a pane that helps the user to confirm their selection in the data tree by displaying related information, such as the level and attributes.

**initiative**
A task developed to achieve objectives or close the gap between performance and targets. Initiatives are associated with individual objectives and often known as projects, actions, or activities.

**item** See member.

## J

**job** A group of runnable objects, such as reports, agents, and other jobs that the user runs and schedules as a batch.

**job step**
The smallest part of a job that can be run separately. A job step can be a report or it can be another job.

## L

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

**level** A set of entities or members that form one section of a hierarchy in a dimension and represent the same type of object. For example, a geographical dimension might contain levels for region, state, and city.

**locale** A setting that identifies language or geography and determines formatting conventions such as collation, case conversion, character classification, the language of messages, date and time representation, and numeric representation.

## M

**MDX** See Multidimensional Expression Language.

**measure**
A performance indicator that is quantifiable and used to determine how well a business is operating. For example, measures can be Revenue, Revenue/Employee, and Profit Margin percent.

**member**
A unique item within a hierarchy. For example, Camping Equipment and 4 Man tent are members of the Products hierarchy.

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

**metric extract**
A set of mappings between an existing Cognos data source and a Metric Studio object or value. For example, a cube measure named Revenue is mapped to a Metric Studio metric named Revenue Actual Value.

**metric package**
In Cognos Connection, a representation of a Metric Studio application. A metric package contains connection information, reports, and metric management tasks for that application. See also package.

**metric store**
A database that contains content for

metric packages. A metric store also contains Metric Studio settings, such as user preferences.

**metric type**
A category of metrics that defines the business rules such as performance pattern, units, and meaning of a group of metrics. For example, Revenue can be a metric type, and European Revenue and North American Revenue would be metrics of this type.

**model** A physical or business representation of the structure of the data from one or more data sources. A model describes data objects, structure, and grouping, as well as relationships and security. In Cognos BI, a model is created and maintained in Framework Manager. The model or a subset of the model must be published to the Cognos server as a package for users to create and run reports.

**multidimensional data source**
See dimensional data source.

**Multidimensional Expression Language (MDX)**
The multidimensional equivalent of Structured Query Language (SQL).

## N

**named set**
See predefined set.

**namespace**
A part of the model in which the names may be defined and used. Within a namespace, each name has a unique meaning.

**news item**
A single entry in a Really Simple Syndication (RSS) compatible format. It can include a headline, text, and a link to more information. A news item task in an agent can be used to create news items for display in a Cognos Connection portlet.

## O

**object** In Report Studio, an empty information container that can be dragged to a report from the Toolbox tab and then filled with data. Reports are made up of objects, which include crosstabs, text items, calculations, graphics, and tables.

**object extract**
An extract that defines the metadata for a Metric Studio object, such as a user defined column, a scorecard, or a data source.

## P

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

**page set**
In Report Studio, a set of one or more designed pages which repeat in the report output for each instance of a chosen query item. See also set.

**passport**
Session-based information, stored and encrypted in Content Manager memory, regarding authenticated users. A passport is created the first time a user accesses Cognos 8, and it is retained until a session ends, either when the user logs off or after a specified period of inactivity.

**portlet**
A reusable component that is part of a web application that provides specific information or services to be presented in the context of a portal.

**predefined set**
A set of members defined inside an OLAP data source as a list or by an expression. Predefined sets can be used in analysis and report authoring. See also custom set, set.

**product locale**
The code or setting that specifies which language, regional settings, or both to use for parts of the product interface, such as menu commands.

**project**

1. In Metric Studio, a task or set of tasks undertaken by a team and monitored on a scorecard. A project tracks dates, resources, and status.

2. In Metric Designer, a group of extracts. Each extract contains the metadata that is used to populate the Metric Studio data store or to create applications.

**prompt**
A report element that asks for parameter values before the report is run.

**properties pane**
Within a studio, a pane that provides an overview of the properties for selected data. The properties pane can also be used to make several changes and apply them at the same time, instead of repeating several different commands.

**publish**
In Cognos BI, to expose all or part of a Framework Manager model or Transformer PowerCube, through a package, to the Cognos server, so that the data can be used to create reports and other content.

## Q

**query** The simple report specifications created and edited by Query Studio.

**query item**
A representation of a column of data in a data source. Query items may appear in a model or in a report and contain a reference to a database column, a reference to another query item, or a calculation.

**query subject**
A named collection of query items that are closely functionally related. Query subjects are defined using Framework Manager to represent relational data and form the set of available data for authoring reports in Query Studio and Report Studio. A query subject is similar to a relational view in that it can be treated as a table but does not necessarily reflect the data storage.

## R

**Really Simple Syndication (RSS)**
An XML file format for syndicated Web content that is based on the Really Simple Syndication specification (RSS 2.0). The RSS XML file formats are used by Internet users to subscribe to websites that have provided RSS feeds. See also Rich Site Summary.

**repeater**
In Report Studio, a cell container that repeats values within itself with no predefined internal structure.

**repeater table**
In Report Studio, a table-like container that repeats cells across and down the page or row in the associated query.

**report** A set of data deliberately laid out to communicate business information.

**report output**
The output produced as a result of executing a report specification against a data set.

**report specification**
An executable definition of a report, including query and layout rules, which can be combined with data to produce a report output.

**report view**
A reference to another report that has its own properties, such as prompt values, schedules, and results. Report views can be used to share a report specification instead of making copies of it.

**response file**
An ASCII file that can be customized with the setup and configuration data that automates an installation. The setup and configuration data would have to be entered during an interactive install, but with a response file, the installation can proceed without any intervention.

**Rich Site Summary (RSS)**
An XML-based format for syndicated web content that is based on the RSS 0.91 specification. The RSS XML file formats are used by Internet users to subscribe to websites that have provided RSS feeds. See also Really Simple Syndication.

**RSS**

1. See Really Simple Syndication.
2. See Rich Site Summary.

## S

**score** A number or ranking that expresses applicability in relation to a standard.

**scorecard**
A collection of metrics representing the performance of one unit or aspect of an organization.

**scorecard structure**
The hierarchy of scorecards that reflects how an enterprise organizes its metrics.

**security provider**
See authentication provider.

**selection-based set**
A collection of individual items that the user has explicitly selected. The items or members may be selected from one or more levels of the same hierarchy. See also set.

**session**
The time during which an authenticated user is logged on.

**set** A collection of related items or members. Members in a set may be specifically chosen, or selected by one or more filter rules. See also custom set, details-based set, page set, predefined set, selection-based set, stacked set.

**stacked set**
Two or more sets arranged one above another in rows or side-by-side in columns. See also set.

**strategy**
The overall plan of action (such as for a brand unit, business unit, channel, or company) to achieve a stated goal. Strategies normally cover a period of more than one year.

**strategy map**
In Metric Studio, a visual representation of the strategy and the objectives of that strategy for an organization. For example, a strategy map may show employees how their jobs are aligned to the overall objectives of the organization.

**summary**
In reporting and analysis, an aggregate value that is calculated for all the values of a particular level or dimension. Examples of summaries include total, minimum, maximum, average, and count.

## T

**task** An action performed by an agent if the event status meets the task execution rules. For example, an agent can send an e-mail, publish a news item, or run a report.

**task execution rule**
A user-specified option within an agent that determines which statuses and values cause a task to be run. It determines which tasks to execute for each event instance.

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

**thumbnail**
An icon-sized rendering of a larger graphic image that permits a user to preview the image without opening a view or graphical editor.

**tuple** An ordered collection of two or more members from different dimensions. For example, the tuple (2007, Camping Equipment, Japan) returns the value for the intersection of the three members: 2007, Camping Equipment, and Japan. Tuples can be used to filter and sort data, and to create calculations.

## U

**union set**
See stacked set.

**user** Any individual, organization, process, device, program, protocol, or system that uses the services of a computing system.

**user-defined column**
In metric management, a column used to represent a value other than the actual or target. It may be an industry benchmark or any other useful additional numerical information for a period, including a calculation based on the other values of the metric. User-defined columns may be different for each metric type.

## W

**watch list**
A list of metrics that each user has chosen to monitor closely. If notification is enabled in Metric Studio, the user will receive e-mail notification of changes to these metrics. Users can also choose to display their watch list as a portlet within Cognos Connection.

**watch rule**
A user-defined condition that determines

whether a report is delivered to the user. When the rule is run, the output is evaluated and, if it satisfies the condition or rule, the report is delivered by e-mail or news item. Watch rules limit report delivery to those reports containing data of significance to the user.

**Web Services for Remote Portlets**
A standard for creating presentation-oriented web services so that they can be easily integrated within other applications, such as web portals.

**widget**
A portable, reusable application or piece of dynamic content that can be placed into a Web page, receive input, and communicate with an application or with another widget.

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

**workspace**
See dashboard.

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