IBM Cognos Workspace
Version 10.2.1

User Guide

Note

Before using this information and the product it supports, read the information in "Notices" on page 125.

Product Information

This document applies to IBM Cognos Business Intelligence Version 10.2.1 and may also apply to subsequent releases.

Contents

Introduction

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

Different access to Cognos Workspace features

The appearance of the user interface, the features that are available to you, and the functions that you are able to perform in IBM Cognos Workspace, depend on a capability that is set for you.

For example, a user with the capability to assemble a workspace can create workspaces and add widgets, whereas the user with the capability to consume a workspace does not see these features. This functionality is controlled by the following capabilities:
- Consume
- Interact
- Assemble

These capabilities are set by an IBM Cognos administrator.

For more information, see “Features available to different capabilities” on page 18.

Finding information

To find IBM Cognos product documentation on the web, including all translated documentation, access one of the IBM Cognos Information Centers (http://pic.dhe.ibm.com/infocenter/cogic/v1r0m0/index.jsp). Release Notes are published directly to Information Centers, and include links to the latest technotes and APARs.

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

Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. Cognos Workspace has accessibility features. For information on these features, see “Accessibility features,” on page 115.

IBM Cognos HTML documentation has accessibility features. PDF documents are supplemental and, as such, include no added accessibility features.

How-to videos

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

Forward-looking statements

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

Samples disclaimer

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Chapter 1. What's new in Cognos Workspace

Knowing what features are new, changed, deprecated, or removed helps you plan your upgrade and deployment strategies and the training requirements for your users.

For information about all of the new features in this release, see the *IBM Cognos Business Intelligence New Features Guide*.

For information about new features in past releases, see the appropriate IBM Cognos Information Center (http://pic.dhe.ibm.com/infocenter/cogic/v1r0m0/index.jsp).

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

For an up-to-date list of environments that are supported by IBM Cognos products, including information about operating systems, patches, browsers, web servers, directory servers, database servers, and application servers, see the Supported Software Environments page (http://www.ibm.com/support/docview.wss?uid=swg27037784).

New features in Cognos Workspace version 10.2.1

This release contains new features.

Filtering on multiple related data items in select value filter and slider filter widgets

In select value filter and slider filter widgets, you can filter on multiple related data items from different reports. For example, you have a report on your workspace that has a Years data item and another report that has a Years_1 data item, but both refer to the same data. You can filter on both data items together.

Related tasks:

"Adding a slider filter widget" on page 41
Use this widget to dynamically filter data in report widgets. Filtering removes unwanted data from a report. For example, using the slider filter, you can retrieve data for revenue that is between 10,000 and 20,000.

"Adding a select value filter widget" on page 39
You can use the select value filter widget to dynamically filter report data. Use this widget to filter data items, such as product or country and region name or single or multiple text values.

Automatically refresh filter values in slider and select value controls

In previous versions, values in slider filter and select value filter widgets were not refreshed when data was refreshed in their corresponding source report widgets.

Now you can automatically refresh values in slider filter and select value filter widgets whenever data is refreshed in their corresponding source report widgets. This is especially convenient for source report widgets that are updated frequently.

Related tasks:

"Adding a slider filter widget" on page 41
Use this widget to dynamically filter data in report widgets. Filtering removes unwanted data from a report. For example, using the slider filter, you can retrieve data for revenue that is between 10,000 and 20,000.

"Adding a select value filter widget" on page 39
You can use the select value filter widget to dynamically filter report data. Use this widget to filter data items, such as product or country and region name or single or multiple text values.

Improved drill behavior

Dashboards retain their formatting and nesting characteristics when you drill up or down in workspaces.

Related concepts:

"Drilling to view related data" on page 87
IBM Cognos Workspace supports various drill operations so that you can view related report data. You can perform drill operations in lists, crosstabs, and charts.

Enhancements to automatic chart recommendation

Automatic chart recommendation helps users choose the best way to view their data. Now it's easier than ever to understand which chart is recommended, how to select it, and the reasons it is recommended. Chart options are clearly explained, as well as the scenarios in which the options should be used.

Related tasks:

"Using the recommended display type" on page 63
You can automatically choose the best display type for your data.

New features in Cognos Workspace version 10.2.0

This release contains new features.

Cognos Business Insight and Cognos Business Insight Advanced are renamed

Two product components are renamed in this release to avoid confusion with the names of other components. IBM Cognos Business Insight is now IBM Cognos Workspace. IBM Cognos Business Insight Advanced is now IBM Cognos Workspace Advanced.

Tabbed workspaces

With tabbed workspaces, you can organize content on multiple tabs in a single workspace. Typically, each tab contains information about a particular area.

For example, you create a workspace with separate tabs for Marketing, Sales, and Revenue.

Related concepts:

"Tabbed workspaces" on page 44
Create a tabbed workspace to organize your content on multiple tabs inside a single workspace.

Global area in tabbed workspaces

A tabbed workspace includes an area that is common to all tabs in the workspace. Here you can keep any object in view as you click though the tabs in the workspace.

For example, you created a workspace with separate tabs for Marketing, Sales, and Revenue. You add a Region filter to the global area so that you can filter on regions as you click through the tabs.

Related concepts:

"Using the global area" on page 45
Use the global area to add objects that you want to make common to all the tabs in your workspace. The objects that you can add are slider filters, select value filters, action buttons, and report parts such as prompts. To add a prompt, expand the report that contains the prompt and drag the prompt to the global area.

Automatic chart recommendation

In the widget toolbar, you can click Change Display Type to automatically get the best display type for the data. IBM Cognos Workspace analyses the data and produces the most suitable display type.

The **Change Display Type** drop-down list in the widget toolbar lists up to five of the most highly recommended display types. The **Change Display** window lists the recommended display types in order and explains why each one is recommended.

To see the original interface, which lists all available display types whether they are recommended or not, click the **All** tab in the **Change Display** window.

Related tasks:

"Using the recommended display type" on page 63
You can automatically choose the best display type for your data.

Chart interaction

You can select a chart or one or more parts of a chart and apply actions. For example, you can filter the chart contents.

Related tasks:

"Interacting with a chart" on page 68
You can select a chart or one or more parts of a chart and apply actions. For example, you can drill up or down on a chart or filter the chart contents.

"Sorting and filtering chart content" on page 68
You can sort and filter chart content in reports. The information bar displays the filter and sort information in the chart.

Freeze column and row headings

You can freeze column and row headings in lists and crosstabs. Freezing the headings keeps them in view as you scroll through the data.

Related tasks:

"Freezing column and row headings" on page 69
When a report contains large lists or crosstabs, you can lock the column and row headings and scroll through the data while the headings remain visible. On a list report, you can freeze the column headings only. You cannot freeze headings that contain prompt controls.

Viewing column and row heading details

In a crosstab, you can expand a column or row heading to view the details that make up the data.

For example, you expand a region heading to display the cities in that region.

Related tasks:

"Viewing column and row heading details" on page 70
In a crosstab, you can expand a column or row heading to view the details that make up the data. For example, you might expand a region heading to display the cities for that region.

Printing a workspace

The print preview feature in a web browser enables you to adjust settings such as scaling and orientation to make your workspace fit on a printed page.

Related tasks:

"Printing a workspace" on page 83
Use the print preview feature in your web browser to adjust the print options and print a workspace.

Graduated capabilities

Access to functions and features in Cognos Workspace can now be controlled by the IBM Cognos administrator.

This functionality is controlled by the following capabilities:

- Consume
- Interact
- Assemble

Related concepts:

"Features available to different capabilities" on page 18
The appearance of the user interface, the features that are available to you, and the functions that you are able to perform in IBM Cognos Workspace, are dependent on a capability that is set for you.

Action button widget

Use this widget to create action buttons that help you go from tab to tab on a workspace. You can also use an image for the button.

Related tasks:

“Adding an action button widget” on page 36
Use this widget to create action buttons that help you go from tab to tab on a workspace. You can also use an image for the button.

Return button on the application bar

Use the return button on the application bar to go back to the previous application, such as IBM Cognos Connection.

Related tasks:

“Launching Cognos Workspace” on page 9
To get started using the product, there are several ways you can open IBM Cognos Workspace.

Google Chrome support

The Google Chrome web browser is now supported for IBM Cognos Workspace.

For a full list of supported software environments, see IBM Cognos Customer Center (http://www.ibm.com/software/data/cognos/customercenter/).

Apple Safari support

The Apple Safari web browser is now supported for IBM Cognos Workspace.

For a full list of supported software environments, see IBM Cognos Customer Center (http://www.ibm.com/software/data/cognos/customercenter).

New features in Cognos Business Insight version 10.1.1

This release contains new features.

Resize charts

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

Swap rows and columns

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

For more information on swapping rows and columns, see “Swap rows and columns” on page 69.

Position Content pane to the left of the workspace

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

By default, the **Content** pane appears on the right side of the workspace. For steps on how to move the **Content** pane to the left side, see “Positioning the Content pane” on page 13.

As a result of this change to the user interface, the Content button that was used to expand and collapse the **Content** pane is removed from the application bar. There are still several ways to expand the **Content** pane. For more information, see "Content pane" on page 12. Also, the search field is moved from the application toolbar to the top of the **Content** pane. The search field stays with the **Content** pane regardless of whether you position the **Content** pane to the right or the left.

Add Active Report content

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

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

User interface improvements

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

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

Dashboards are now workspaces

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

Improved thumbnails

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

This release also includes performance enhancements for thumbnails.

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

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

Meaningful names for Analysis Studio report parts

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

Microsoft Internet Explorer support

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

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

Mozilla Firefox support

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

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

Freedom Scientific JAWS support

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

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

Larger worksheet sizes for Microsoft Excel 2007 report outputs

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

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

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

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

Related concepts:

"Exporting workspace widgets to different formats" on page 84
You can export individual report widgets that contain report content to the following formats: PDF, Microsoft Excel, CSV, and XML.

Chapter 2. Understanding Cognos Workspace

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

Launching Cognos Workspace

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

By default, Cognos Workspace opens in the same browser window as IBM Cognos Connection. An administrator can change this behavior to open Cognos Workspace in a separate window. For more information, see the *IBM Cognos Business Intelligence Administration and Security Guide*.

Tip: After you launch Cognos Workspace, use the return button in the application bar to return to the previous application.

You can launch Cognos Workspace 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 Cognos Workspace 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

Minimal support for Microsoft Internet Explorer 6

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

Logging on

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

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

Before you begin

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

Procedure

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

Results

Your session starts.

Logging off

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

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

Procedure

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

The user interface

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

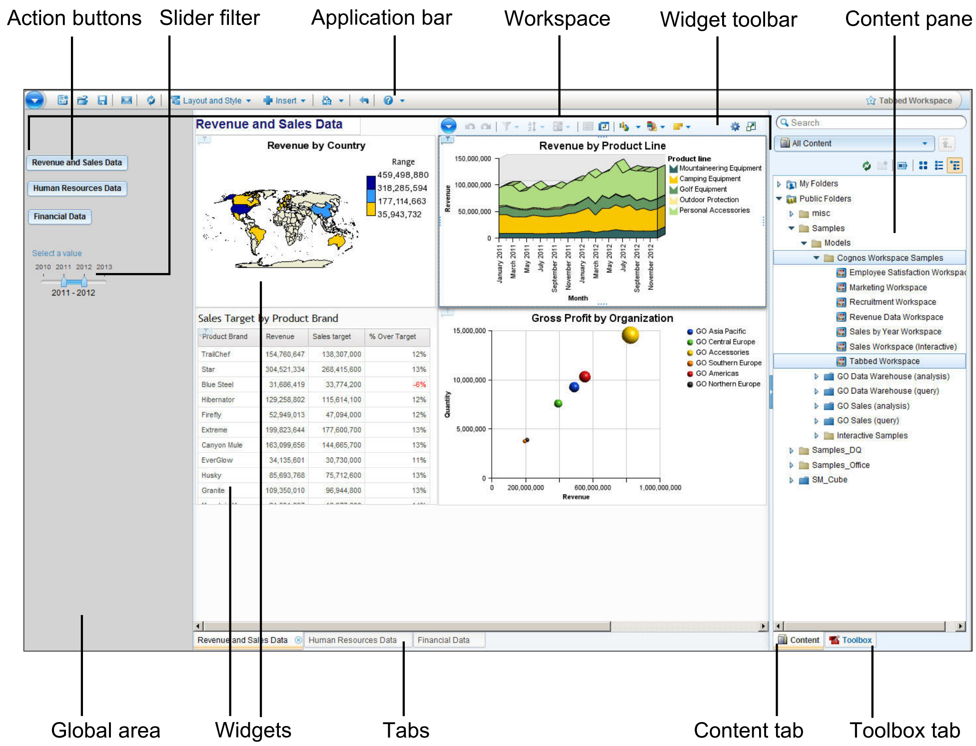


Figure 1. The Cognos Workspace user interface

Getting Started page

The Getting Started page displays when you launch IBM Cognos Workspace.

From the Getting Started page you can perform the following tasks:
- View and open your favorite workspaces and reports
- Create a new workspace
- Open an existing workspace
- View how-to videos that provide an overview to Cognos Workspace

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

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

If you want to return to the Getting Started page from a workspace, open the **Help** menu by clicking the arrow icon beside the **Help** icon and select **Show the Getting Started Page**.

Application bar

The application bar displays the name of the current workspace and icons to use Cognos Workspace.

Move the mouse over the icons to display short descriptions.

Workspace

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

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

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

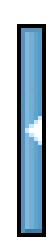
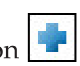
- **Fit All Widgets to Window**
- **Arrange All Widgets to Fit Content**

For more information on these layout actions, see "Modifying the workspace layout" on page 50.

Content pane

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

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

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

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

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

Content tab

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

There are two expandable folders:

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

Within the **Content** tab, you can create new folders by clicking the new folder icon . For more information, see “Creating a folder in the Content pane” on page 93.

Also within the **Content** tab, you can enable and disable the display of information cards by clicking the information card button . For more information, see “Viewing information cards” on page 93.

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

- Thumbnail
- List
- Tree

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

- **All Content** displays all content in the content store, excluding any content that is not supported in Cognos Workspace. This is the default setting.
- **My Favorites** displays workspaces and reports that have been marked as favorites.
- **My Folders** displays only the content in your **My Folders** folder.
- **Search Results** displays content based on search results. You must first perform a search, otherwise this filter is not available.

You can refresh the selected content in the tree view or the visible content in the thumbnail view and list view by clicking the refresh button .

Toolbox tab

The **Toolbox** tab displays additional widgets provided by Cognos Workspace. The slider filter and select value filter widgets allow you to filter report content. The other toolbox widgets allow you to add more report content to the workspace, such as HTML content, images, RSS feeds, and rich text. For a list of toolbox widgets, see “Toolbox widgets” on page 15.

Positioning the Content pane

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

Procedure

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

Tip: After you change the position of the Content pane, the global area will appear beside the Content pane until you restart Cognos Workspace.

Widgets

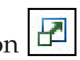
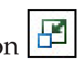
Objects you add from the **Content** pane to the workspace are displayed in widgets. Widgets are containers that allow you to interact with and manipulate the content contained within them.

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

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

Maximizing widgets

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

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

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

Content widgets

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

Report widget:

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

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

IBM Cognos Navigator widget:

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

You can also open the same navigation view in IBM Cognos Connection by clicking the arrow button in the widget. For more information, see “IBM Cognos Navigator” on page 30.

PowerPlay widget:

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

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

TM1 widget:

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

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

Toolbox widgets

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

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

Action button widget

The action button widget is used to create buttons that are used to navigate tabs. For more information, see “Adding an action button widget” on page 36.

Image widget

The image widget is used to display images. For more information, see “Adding an image widget” on page 36.

My Inbox widget

The **My Inbox** widget is used to show a Really Simple Syndication (RSS) feed of your secure approval requests, ad-hoc tasks, and notification requests from **My Inbox** in IBM Cognos Connection. For more information, see “Adding a My Inbox widget” on page 37.

RSS feed widget

The RSS feed widget is used to display RSS news feeds. For more information, see “Adding an RSS feed widget” on page 38.

Select value filter widget

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

Slider filter widget

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

Text widget

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

Web page widget

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

Actions menus

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

Actions menu

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

- **New** creates a new workspace.
- **Open** opens an existing workspace.
- **Save** saves changes to a workspace.
- **Save As** saves a workspace with a new file name or new location.
- **Email Link** sends the URL of the current workspace by email, or copies the URL to the clipboard so it can be pasted into other documents.
- **Copy Link to Clipboard** copies the URL to the clipboard so it can be pasted into other documents.
- **New Tab** adds a new tab to the workspace.
- **Rename This Tab** renames the selected tab.
- **Remove This Tab** removes the selected tab.
- **Order Tabs** sets the order of the tabs.
- **Edit Workspace Style** changes the visual appearance of the workspace style and widgets to customize the look of your workspace.
- **My Preferences** sets personal preferences for accessibility support for reports, Getting Started page display, product and content language, and time zone.
- **Log On** if your system requires authenticated access to launch Cognos Workspace. Log off to end your session.
- **Launch** starts installed IBM Cognos applications that you have permission to use.
- **Refresh Workspace** refreshes all workspace widgets.

Widget actions

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

All workspace widgets provide the following actions:

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

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

PowerPlay widgets provide the standard widget actions as well as the following actions:
- **Export** creates CSV and XLS format versions of the widget data.
- **Refresh** updates the widget content with the latest data.
- **Show Dimension Viewer** displays the dimension view in the widget.

TM1 Cube Viewer widgets provide the standard widget actions, as well as the following actions:
- **Refresh** updates the widget content with the latest data.
- **Reset** sets the Cube view to the original view.
- **Restart** restarts a session after a session timeout.

TM1 Websheet widgets provide the standard widget actions.

Setting a home page

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

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

Procedure

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

Resetting a home page to the default setting

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

Procedure

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

Features available to different capabilities

The appearance of the user interface, the features that are available to you, and the functions that you are able to perform in IBM Cognos Workspace, are dependent on a capability that is set for you.

For example, a user with the capability to assemble a workspace can create workspaces and add widgets, whereas the user with the capability to consume a workspace does not see these features. This functionality is controlled by the following capabilities:

- Consume
- Interact
- Assemble

The Interact and Assemble capabilities are set by an IBM Cognos administrator. The relevant function in IBM Cognos Administration is called **Executive Dashboard**. The **Use Interactive Dashboard Features** permissions correspond to the Interact capability. The **Use Advanced Dashboard Features** permissions correspond to the Assemble capability. All other users have the Consume capability. For more information, see the chapter “Secured Functions and Features” in the *IBM Cognos Business Intelligence Administration and Security Guide*.

The following table specifies which functions and features are associated with the different capabilities.

Table 1. Functions and features available for each capability in Cognos Workspace

Function or feature	Consume	Interact	Assemble
Add comments	X	X	X
Collaborate	X	X	X
Print workspaces	X	X	X
Drill down and drill up	X	X	X
Expand and collapse column or row headings in crosstabs	X	X	X
Freeze column or row headings in lists and crosstabs	X	X	X
Add workspaces to the canvas from the Content pane	X	X	X
Go to a target report	X	X	X
Export widgets	X	X	X
View report versions	X	X	X
Undo	X	X	X
Redo	X	X	X
Edit text widgets		X	X
Widget toolbars appear on widgets		X	X

Table 1. Functions and features available for each capability in Cognos Workspace (continued)

Function or feature	Consume	Interact	Assemble
Widgets include the following functions and features: • Change display type • Calculate • Sort • Delete • Group/ungroup • Rename • Swap rows and columns • Move • Do more • Reset • Maximize or restore widget		X	X
Save		X	X
Save As		X	X
Filter without sliders or select value filters already present on the workspace		X	X
Add reports and report parts to the canvas from the Content pane			X
Add toolbox widgets from the **Toolbox** tab in the Content pane			X
Create workspaces			X
Drag widgets			X
Resize widgets			X
Edit the workspace style			X
Add, remove, rename tabs in tabbed workspaces			X
Modify slider and select value filter properties			X
Search for reports, report parts, or anything other than workspaces			X

Chapter 3. Creating workspaces

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

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

Adding IBM Cognos content

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

You cannot move objects from one tab to another.

Tip: You can use the keyboard shortcut Ctrl+Shift+Enter to add a selected object, or right-click the object in the Content pane and select **Insert in Current Tab**.

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

You can use the enhanced search feature of IBM Cognos Workspace to find and add relevant content to your workspace. For more information, see "Searching for content" on page 33.

Report content

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

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

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

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

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

Do more with Cognos Workspace Advanced

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

Report versions

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

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

For more information, see “Viewing report versions” on page 88.

Report prompts

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

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

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

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

You can insert the complete prompt page of a report in the content pane. If the prompts all appear in the content pane but some prompts do not appear in the workspace when you add the prompt page to the workspace, contact the report author. The report author must name each object in the report.

You can change the prompt values for report content regardless of the default prompt settings that are specified for the report. The report is run and live data is filtered and returned based on the selected prompt value or values. For more information, see “Changing the prompt values in a report” on page 77.

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

Tables and charts

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

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

Bonus list

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

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

Training crosstab

Course cost	Expense plan total	*Difference*	*Percent of Plan*
GO Accessories	373,600	*49,350*	*113%*
GO Americas	331,700	*59,900*	*118%*
GO Asia Pacific	390,200	*39,650*	*110%*
GO Central Europe	399,300	*34,800*	*109%*
GO Northern Europe	316,100	*4,800*	*102%*
GO Southern Europe	237,700	*14,150*	*106%*

Charts provide a graphical way to present data. For information on the chart formats that are supported in IBM Cognos Workspace, see “Supported chart formats” on page 67.

To change the color palette for charts, see “Change the chart color palette” on page 69.

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

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

Content contained in report widgets can interact with other report widgets and with IBM Cognos Navigator, slider filter, and select value filter widgets. This allows you to dynamically display, interact with, and filter report content. For more information, see “Configuring widget communication” on page 48.

Metric Studio content

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

You can add the following Metric Studio content to a workspace:
- Watch lists
- Scorecards
- Strategies
- Metric types
- Individual metrics

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

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

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

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

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

Set report widget properties

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

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

Procedure

1. Click the **Widget Actions** button for the widget, and from the drop-down list, click **Properties**.
2. On the **Title** tab, set the **Widget title** property and click **OK**.

   The **Widget title** property specifies the title of the widget. If no title is specified, the report name is used.

   For translated versions of the workspace, you can show this title on the widget for other languages when the widget title is not specified in the other language. To do so, select the **Use title as default for other languages** option.

   Widget titles are only displayed if you select the **Show Titles** option in the **Widgets** tab of the **Edit Workspace Style** dialog box. By default, widget titles are disabled. For more information, see "Workspace style" on page 51.

   For information on authoring workspaces for use in multiple languages or locales, see "Creating multilingual workspaces" on page 55.
3. On the **Report** tab, set the properties as described in the following table, and click **OK**.

Property	Description
Maximum number of rows to show per page	Specifies the maximum number of rows to display per page for tabular reports and report parts. The default value is 20. The **Maximum number of rows to show per page** property is the only widget property that can be undone by using the undo button .
Prompt when workspace is opened	Specifies that if workspace reports contain prompts, the prompts run when the workspace starts. If this property is disabled, the prompted reports use the last saved prompt values. By default, prompts are enabled.

Property	Description
Retrieve entire report	Specifies if the entire report loads into memory when the workspace starts. By default, this property is disabled and report data is loaded one page at a time for better workspace performance. This property is only applicable to saved report output versions. For more information, see "Viewing report versions" on page 88.
View report specification	Displays the report specification in XML format. The specification displays in a new browser window. This is useful for debugging reports that do not run properly.
Location	Displays where in the **Content** tab the report is located. For example, the location might look like the following: Public Folders > Cognos Workspace > Basic Report > List Basic.

Active Report content

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

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

- You have the permissions to view and interact with active reports.
- The active report has saved output. If you try to open an active report that does not have saved output, an error message appears. The active report author must save the output of the report before you can view it on a workspace.

Active reports can be configured by an active report author to communicate with the following:

- Active report widgets
- Sliders and select value filters
- Report widgets

  Restriction: Active report widgets can listen to report widgets. However, report widgets cannot listen to active report widgets.

In the **Listen for Widget Events** window for an active report widget, the widget events for report widgets, active report widgets, sliders, and select value filters are enabled by default.

For more information, see "Configuring widget communication" on page 48. To disable the communication between active report widgets see, "Disabling widget communication" on page 49.

PowerPlay content

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

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

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

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

Viewing PowerPlay content in HTML

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

The following list contains the available PowerPlay actions:

- Crosstab display

  Switch between crosstab and indented crosstab display for the selected PowerPlay report.
- Chart display

  Select a chart type to display data graphically.
- Display options

  Set report display options, add or edit report titles, view a crosstab and a chart together, and reset report content.
- Swap rows and columns

  Exchange the positions of categories in rows and columns.
- Hide and show categories

  Selectively show or hide report categories.
- Calculations

  Create a calculation that combines rows or columns to obtain a new item.
- Rank categories

  Add rank categories to reports to show rank ordinals and compare categories.
- Zero suppression

  Avoid displaying categories with zero values.
- 80/20 suppression

  Remove rows or columns whose absolute values do not contribute to the top 80% of results.
- Custom exception highlighting

  Emphasize specific data.
- Custom subsets

  Define subsets of categories based on specified criteria to help you isolate, explore, and analyze specific data elements.
- Drill through

  Create drill through definitions to go to and from PowerPlay reports and IBM Cognos BI reports.

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

Viewing PowerPlay content as a PDF

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

Procedure

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

Setting the PowerPlay widget title

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

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

Cognos TM1 content

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

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

- Cognos TM1 is installed and configured as part of your IBM Cognos Business Intelligence environment. If you change the BI environment to use SSL, you must also change TM1 Web to SSL.
- You have the permissions and capabilities to view and interact with Cognos TM1 content.

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

Adding Cognos TM1 content to Cognos Workspace

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

You can add the following TM1 content to the workspace:

- Cognos TM1 Websheet
- Cognos TM1 Cube view
- Cognos TM1 Applications

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

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

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

If you change the data in a TM1 Cube view or a TM1 Websheet, click **Refresh All** on the application bar to refresh the data for each TM1 Cube view and TM1 Websheet on the workspace.

Adding TM1 Websheet Viewer widgets:

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

TM1 Websheet Viewer widgets provide the standard widget actions. For more information on widget actions, see “Widget actions” on page 16.

Procedure

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

Adding TM1 Cube Viewer widgets:

The TM1 Cube Viewer widget displays a TM1 Cube view.

TM1 Cube Viewer widgets provide the standard widget actions as well as **Reset** and **Restart**. For more information on widget actions, see “Widget actions” on page 16.

Also, TM1 Cube Viewer widgets listen to each other by default. You can disable this communication. For more information, see “Widget to widget communication” on page 48.

Procedure

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

Viewing Cognos TM1 Applications in a widget

IBM Cognos TM1 Applications object displays in a web page widget with a URL that a TM1 administrator specifies to point to a TM1 Applications Web.

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

Procedure

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

Results

When you launch TM1 Applications Web within the widget, a return arrow button provides navigation back to the main page.

For more information about TM1 Applications, see the *IBM Cognos TM1 Applications Guide*.

Setting the TM1 widget title

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

Procedure

1. On the widget that you want to set the title for, select the border of the widget to activate the widget toolbar.
2. Click the **Widget Actions** button  for the widget and, from the drop-down list, click **Properties**.
3. Specify a title for the widget and select **Show title on this widget**.

   For translated versions of the workspace, you can show this title on the widget for other languages when the widget title is not specified in the other language. To do so, select the **Use title as default for other languages** option.

IBM Cognos Navigator

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

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

Procedure

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

Property	Description
Title	Specifies the title for the widget. You can select the folder name or type the title.
Language	If you choose to type the title, you must also specify the product language in which the title is displayed. You can assign the same title for multiple language versions. For information on authoring workspaces for use in multiple languages or locales, see "Creating multilingual workspaces" on page 55.
Folder	Specifies the top-level location where the navigation begins.

Property	Description
View	Specifies how folders and content objects display in the navigator widget. To show a list of objects, use the **Navigator list** view. This is the default view. To show objects and detailed information, such as the last modification date, use the **Navigator details** view. Links open more detailed information about the object. To show URL links and shortcuts in an RSS-type format, use the **News list** view.
Open links	Specifies how the links in this widget are opened. You can • open and navigate the linked entries in a new browser window. This is the default option. • open and navigate the linked entries in a named HTML frame. Type the name or widget type in the provided text box. • open and navigate the linked entries in a destination portlet. Type the channel name as specified in IBM Cognos Viewer.
Navigation links	Specifies whether to maximize the widget view when navigating the folder contents.
Features to expose in the Navigator views	Specifies how the folders and content objects are displayed for the normal and maximized modes in this widget. You can specify a different view for normal and maximized windows. To show or hide the parent entry of the top level folder in the IBM Cognos folder hierarchy, select the **Parent in path** check box. To show or hide the **Actions** column for the entries and view the content of container entries in source applications, select the **Actions** check box. To show or hide the modification date and description of entries in applicable views, select the **Additional information** check box. To specify in how many columns you want the entries to appear in the details view, select the values from the **Number of columns in a details view** drop-down lists. The default is 2 for the normal mode view and 4 for the maximized mode view.

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

Workspaces published from IBM Cognos Insight to IBM Cognos Workspace

A workspace that was created in IBM Cognos Insight can be published to an IBM Cognos Business Intelligence server and then used in IBM Cognos Workspace.

When you publish Cognos Insight workspaces to Cognos BI, the workspace appears in Cognos Workspace almost the same way that it appeared in Cognos Insight.

For example, when you publish a workspace that includes an explore point widget, that explore point widget appears in Cognos Workspace. With an explore point, you can explore the connections between dimensions. Each selected dimension appears in a separate explore point. When you select a member in one explore point, members in other dimensions that are associated to it are highlighted while members that are not associated to it are not highlighted.

For example, one explore point shows months and another explore point shows countries or regions. When you select December and Switzerland, you see that ski jackets are selling but beach umbrellas are not.

Restriction: The following items appear differently when you publish a Cognos Insight workspace and open it in Cognos Workspace:

- Action buttons that run IBM Cognos TM1 TurboIntegrator scripts do not appear.
- Text measures in crosstabs do not appear.
- Report widgets that are published from Cognos Insight do not populate the list of values for slider filters and check box controls in Cognos Workspace.
- Resizing of rows and columns is not preserved.
- If you hide a nested intersection in Cognos Insight, the other nested intersections for those dimensions will be hidden in Cognos Workspace. For example, if product lines are nested in years, and you hide the 2011 revenue for Golf Equipment in your Cognos Insight crosstab, when you open the workspace in Cognos Workspace, the revenue for Golf Equipment is hidden for all years.
- If you expand or collapse a nested intersection in Cognos Insight, the other nested intersections for those dimensions will be expanded or collapsed in Cognos Workspace. For example, if product lines are nested in years, and you collapse the 2012 revenue to show only the total for all product lines, when you open the workspace in Cognos Workspace, all product lines in all years will be collapsed.

- Fonts may appear smaller in Cognos Workspace than they appear in Cognos Insight. This occurs when the font DPI setting in your Microsoft Windows operating system is larger than the font DPI setting in your Web browser. To resolve this issue, change your Microsoft Windows operating system DPI to 96, which is the default for most web browsers.
- Totals that are set to **Show Totals Trailing** may not appear. Trailing totals will be preserved only for dimensions that have been drilled down or drilled up on in Cognos Insight. If trailing totals are not preserved, totals will appear leading in Cognos Workspace.
- Web page widgets that include URLs that are not listed in the safe domains list do not appear. The issue can be resolved by adding the domains to the safe domains list in IBM Cognos Configuration or IBM Cognos Administration.
- Reports that access IBM Cognos TM1 cubes and do not include at least one measure do not appear.
- Some number formats do not appear. Number formats can be adjusted to match after you publish by using any of the default formats that are available in IBM Cognos Architect.
- Chart scales may differ. The data that appears in Cognos Workspace will be correct, but Cognos Workspace may display a different range of values on an axis, which changes the scale of the chart.
- Information from the overview area in Cognos Insight is available in the Cognos Workspace information bar.
- The width and depth of the bars in a bar chart may differ.
- Synchronized drilling will be turned on by default in Cognos Workspace.
- The explore pane does not appear.
- When top and bottom filters are applied to intersected dimensions, filter results may not appear in the same way.
- Comments do not appear.

Searching for content

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

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

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

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

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

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

Performing a search

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

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

Search types

There are four types of search that you can perform in IBM Cognos Workspace:

- IBM Cognos results

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

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

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

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

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

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

Searching for comments

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

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

Searching for IBM Connections workspace activities

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

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

  For example, if you have an activity named Toronto sales that is connected to your Sales workspace, the search results for Toronto include this workspace in the IBM Cognos results.
- When you search for Connections content, activities connected to a workspace are included (depending on the index and search rules). Additional Connections content that is unrelated to the workspace but contains your search term is also listed here.

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

Index and search rules

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

Search for content

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

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

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

Procedure

1. In the **Content** pane, type a term in the search box, and then click the **Search** button .

   By default, IBM Cognos results are shown in the results pane.
2. From the result type drop-down list, select the type of search you want to perform.

   Entries that match the search criteria and that you have permission to view appear in the results pane.
3. Expand an item to view further details.

Refining IBM Cognos results

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

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

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

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

Use the following filters to refine your search results:

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

Procedure

1. In the **Content** pane, click **Refine Search**.
2. In the refine pane, refine the results by selecting one or more filters as required.

   For each filter you select, the search results change to reflect your selections.

3. To close the refine pane, click **Refine Search**.

Adding toolbox widgets

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

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

You can add the following tools to a workspace:
- Action button
- Image
- My Inbox
- RSS feed
- Select value filter
- Slider filter
- Text
- Web page

Adding an action button widget

Use this widget to create action buttons that help you go from tab to tab on a workspace. You can also use an image for the button.

Procedure

1. In the **Toolbox** tab of the content pane, select the **Action button** object and drag it onto the workspace.
2. To specify what the action button will do when you click it in a workspace, select an action from the **Action** list.
3. To specify what text will appear on the button or whether to use an image, select one of the following options from **Style**:
   - Use **Default Label**, which is the default option, to display the name of the action that you selected from the **Action** list.
   - Use **Customized Label** to add your own custom text to the label.
   - Use **Button Image URL** to include a custom image instead of the default blue button. Type the URL address for the button image using the following format: *http://www.my_server.com/path_to_image/image_file_name*

     The image URL must be added to the valid domain list as defined in the IBM Cognos Administration tool. For more information, see the *IBM Cognos Business Intelligence Administration and Security Guide* or contact your system administrator.

     Click the **Preview** button to quickly verify that the URL address is correct.
4. Click **OK**.

Adding an image widget

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

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

If the workspace will be viewed on a mobile device such as an Apple iPad, use Portable Network Graphics (PNG) as the format for the images. Otherwise, an image will appear as an X.

Procedure

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

Property	Description
Image	Specifies the folder location and the file name of the image as a URL. The supported image formats are PNG, GIF, and JPG. Type the URL address for the image using the following format: *http://www.my_server.com/path_to_image/image_file_name*. Click the **Preview** button if you want to quickly verify that the URL address you entered is correct.
Image size	Specifies the size of the image. You can leave the original size of the image or customize the image by changing its width and height (in pixels).
Alternate text	Type text to be read by screen readers. Alternate text is also displayed if the image is not available. Leave this option blank if you do not want images to contain alternate text.
Target URL	Specifies the web page to display when the image is clicked. Type the appropriate URL address. Leave this option blank if you do not want to display a web page.
Open links	Specifies how the target URL in this widget is displayed. This option works only if a target URL is specified. **Broadcast to all widgets** is the default option. Use this option to display the URL in the web page widget. The web page widget automatically listens to broadcasts from the image widget if this option is selected. If you do not want a web page widget to receive input from an image widget, disable the widget communication in the web page widget. For more information, see “Disabling widget communication” on page 49. Use **In new window** to display the URL in a new browser window when the image is clicked.

Adding a My Inbox widget

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

Procedure

1. In the **Toolbox** tab, select the **My Inbox** object and drag it onto the workspace.

   Tip: Click a task or notification to open it in My Inbox.

2. To change the properties of the widget, click the **Widget Actions** button  and click **Properties** from the drop-down list.
3. In the **RSS Feed** tab, set the properties as described in the following table, and click **OK**.

Property	Description
URL	Specifies the URL address of the RSS feed link to My Inbox. **Note:** The URL address is pre-defined and should not be changed.
Options	Specifies the display options for the RSS feed. To include a description of the feed, use the **Show details** option. To include an image, such as a logo, associated with the feed, use the **Show the feed icon** option. To separate entries with different background colors to make the entries easier to read, use the **Show alternating background** option.
Maximum number of entries to display	Specifies the maximum number of feed links to display in the widget. The default value is 5.
Open links	Specifies how the links in the My Inbox widget are opened. You can select **Broadcast to all widgets** or **In new window**. Use **Broadcast to all widgets** to display the feed links in the web page widget. The web page widget automatically listens to broadcasts from the My Inbox widget if this option is selected. If you do not want a web page widget to receive input from the My Inbox widget, you must disable the widget communication in the web page widget. For more information, see “Disabling widget communication” on page 49. Use **In new window** to display the linked entries in a new browser window. This is the default option.

Adding an RSS feed widget

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

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

Procedure

1. In the **Toolbox** tab, select the **RSS Feed** object and drag it onto the workspace.

2. In the properties dialog box, set the properties as described in the following table, and click **OK**.

Property	Description
URL	Specifies the URL address that identifies the RSS or Atom channel feed. The specified URL must point to a valid RSS or Atom feed and not a web page. For example, a valid RSS feed link opens an XML file, not a web page. The RSS or Atom channel includes a list of links to specific web pages. The links can include a title and a short description of the linked story.
Options	Specifies the display options for the RSS or Atom feed. To include a description of the RSS or Atom feed, use the **Show feed details** option. To include an image, such as a logo, associated with the RSS or Atom feed, use the **Show the feed icon** option. To separate entries with different background colors to make the entries easier to read, use the **Show alternating background** option.
Maximum number of entries to display	Specifies the maximum number of feed links to display in the widget. The default value is 5.
Open links	Specifies how the links in the RSS feed widget are opened. You can select **Broadcast to all widgets** or **In new window**. Use **Broadcast to all widgets** to display the feed links in the web page widget. If **Broadcast to all widgets** is selected, the web page widget automatically listens to broadcasts from the RSS feed widget. If you do not want a web page widget to receive input from the RSS feed widget, you must disable the widget communication in the web page widget. For more information, see "Disabling widget communication" on page 49. **Note:** If you click an image in the RSS feed widget, the image always displays in a new browser window, not in the web page widget. Use **In new window** to display the linked entries in a new browser window. This is the default option.

Adding a select value filter widget

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

Tip: If you use select value filter widgets to filter reports created in IBM Cognos Analysis Studio, the data that is retrieved is not always meaningful. To obtain the most meaningful results, use Cognos Analysis Studio's built-in filtering and analysis capabilities to filter your data.

Before you begin

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

Procedure

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

   For more information, see "Widget to widget communication" on page 48.

Property	Description
Select data items to filter on	Specifies the data items that you can refine. Beside each listed data item, a column identifies the widgets on the workspace that use the data item and the widgets that the select value filter widget will affect. Disabled data items are already listening to a slider filter or select value filter on the workspace. You cannot select the same data item for more than one filter. You might see data items that are not shown in the report; however, you can filter on them. For example, a chart on the workspace shows revenue for regions, but not years. When you add a select value filter, if the report was authored to filter on years when displayed in IBM Cognos Workspace, you will see years in the filter properties. For more information on enabling filters in reports for workspaces, see the *IBM Cognos Report Studio User Guide*. **Note:** If you disabled the select value filter widget from listening to the data values of a specific data item and you filter on that data item, the data values do not appear in the **Use only the following values** box. To solve this issue, select a different data item to filter on or enable the select value filter widget to listen to the data values for that data item. For more information, see "Widget to widget communication" on page 48. **Tip:** Pause the pointer over the widget title to highlight the associated widget on the workspace.
Filter on multiple related data items	When you have data items from separate reports that filter on the same data, select **Filter on multiple related data items** to combine the related data items to filter on. For example, you might have two reports on your workspace; one report has a Years data item while the other report has a Years_1 data item. The two data items filter on the same data even though they have two different names in the select value filter properties dialog. In this case, you select **Filter on multiple related data items** and then select Years and Years_1 to combine the two data items.
Use only the following values	Specifies the list of values associated with the selected data item. By default, all of the values for the item or items are selected. Clear the values that you do not want shown in the workspace. After you close the properties dialog box, the values that are filtered on display in the information bar on the report widget.

Property	Description
Number of items that can be selected	Specifies whether you can select single or multiple values in the widget.
Style	Specifies how the values display in the widget. The options that are available depend on whether you selected single or multiple values. If you choose single value for the number of items property, the available options for the style property are list, menu, and radio buttons. The default is radio buttons. If you choose multiple values, the available options are list and check boxes. The default is check boxes.
Automatically update the filter when the values change	Specifies that when the data source is updated with new values, the select value filter is automatically updated to reflect the new values. For example, if the select value filter is filtering on a data item called Department and you add a value called Finance to the data source, Finance will appear as a value in the select value filter on your workspace.
Show descriptive text	Sets a text description for the select value filter. You can use this text to provide instructions or details on using the select value filter.

Example

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

Related tasks:

"Filtering with slider filter and select value filter widgets" on page 72
Use the filter widgets in your workspace to filter table and chart data in the report widgets that the filter widgets communicate with.

Adding a slider filter widget

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

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

Tip: If you use slider filter widgets to filter reports created in IBM Cognos Analysis Studio, the data that is retrieved is not always meaningful. To obtain the most meaningful results, use Cognos Analysis Studio's built-in filtering and analysis capabilities to filter your data.

Before you begin

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

Procedure

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

   For more information, see "Widget to widget communication" on page 48.

Property	Description
Select data items to filter on	Specifies the data items on which you can filter. Beside each listed data item, a column identifies the widgets on the workspace that use the data item and that the slider filter will affect. Disabled data items are already listening to a slider filter or select value filter on the workspace. You cannot select the same data item for more than one filter. You might see data items that are not shown in the report; however, you can filter on them. For example, a chart on the workspace shows revenue for regions, but not years. When you add a slider filter, if the report was authored to filter on years when displayed in IBM Cognos Workspace, you will see years in the filter properties. For more information on enabling filters in reports for workspaces, see the *IBM Cognos Report Studio User Guide*. **Note:** If you disabled the select value filter widget from listening to the data values of a specific data item and you filter on that data item, the data values will not appear in the **Use only the following values** box. To solve this issue, select a different data item to filter on or enable the select value filter widget to listen to the data values for that data item. For more information, see "Widget to widget communication" on page 48. **Tip:** Pause the pointer over the widget title to highlight the associated widget on the workspace.
Filter on multiple related data items	When you have data items from separate reports that filter on the same data, select **Filter on multiple related data items** to combine the related data items to filter on. For example, you might have two reports on your workspace; one report has a Years data item while the other report has a Years_1 data item. The two data items filter on the same data even though they have two different names in the slider filter properties dialog. In this case, you select **Filter on multiple related data items** and then select Years and Years_1 to combine the two data items.

Property	Description
Use only the following values	If the data item that is selected is a numeric value, such as quantity or revenue, you can set a range of values to display on the slider filter. The default behavior is to display the lowest to the highest values; however, you can set specific range of values to use. For large or complex reports, lowest value to highest value may display zeros. In this case, enter the lowest to highest values manually. If the data item that is selected is a text value, such as a product, year, or country or region, a list of the values that are associated with the item display. By default, all of the values for the item or items are selected. Clear the values that you do not want shown in the workspace. After you close the properties dialog box, the values that are filtered on display in the information bar on the report widget. **Tip:** Use the sort arrow to sort this list of values in ascending or descending order.
Style	Specifies if the slider filter operates on a **Range of values** or a **Single value** of the selected data item.
Display values as filter labels	Specifies whether to show the values as filter labels on the slider filter scale. If you do not select this option, only the lowest and highest values display. However, the value of the slider filter setting always displays in a tooltip above the slider filter pointer.
Automatically update the filter when the values change	Specifies that when the data source is updated with new values, the slider filter is automatically updated to reflect the new values. For example, if the slider is filtering on a data item called Department and you add a value called Finance to the data source, Finance will appear as a value in the slider on your workspace.
Show descriptive text	Sets a text description for the slider filter. You can use this text to provide instructions or details on using the slider filter.

Related tasks:

"Filtering with slider filter and select value filter widgets" on page 72
Use the filter widgets in your workspace to filter table and chart data in the report widgets that the filter widgets communicate with.

Adding a text widget

Use this widget to add text to a workspace.

Procedure

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

Results

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

Adding a web page widget

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

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

Procedure

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

Tabbed workspaces

Create a tabbed workspace to organize your content on multiple tabs inside a single workspace.

On a tabbed workspace, you can click the tabs to move between tabbed pages to view widgets on each of the different tabs. A tabbed workspace includes a global area that is common to all tabs in the workspace. As you click through the tabs, widgets on the expanded global area stay visible on your workspace and communicate with widgets on any or all of the tabs.

You cannot move widgets from one tab to another.

Example of how to use a tabbed workspace

You want to view several areas of your business within one workspace and quickly switch between regions as you view the data. You create a workspace with four separate new tabs, one tab for each of the following areas: Marketing, Recruitment, Revenue data, and Sales.

The default names for the new tabs are Tab 1, Tab 2, Tab 3, and Tab 4. You rename the tabs to Marketing, Recruitment, Revenue data, and Sales, and add the appropriate reports and report parts to each of the tabs.

In the global area, you add a select value filter and choose the data item Region to filter on. As you browse through the tabs, you see that the data in each tab reflects the filter that you selected in the global area.

Adding a tab

Add tabs to create a tabbed workspace.

Procedure

1. Click the **Actions Menu** icon  and select **New Tab**.

   Tip: Alternatively, you can right-click on the workspace and select **New Tab**.
2. Rename the tab or repeat step one to add another new tab.

Renaming a tab

Give meaningful and appropriate names to tabs to better organize your content. By default, the name for a new tab is Tab 1, Tab 2, and so on.

Procedure

1. Select the tab that you want to rename.
2. Click the **Actions Menu** button and select **Rename This Tab**.

   Tip: Alternatively, you can double-click the tab name. Or, right-click on the workspace and select **Rename This Tab**.
3. Enter a new name for the tab and click **OK**.

Seeing all your tabs

If you open more tabs than will fit on the workspace, tab scroll buttons appear at each end of the tab strip.

Click the tab scroll buttons to scroll the tab strip left or right.

You can also click the up arrow button beside the right scroll button and select the tab you want from the menu that is displayed.

Removing a tab

Remove a tab to delete it from the workspace.

Procedure

1. Select the tab you want to delete.
2. Click the remove button beside the name of the tab, and click **Remove**.

   Tip: Alternatively, you can right-click the tab and click **Remove** or right-click the workspace and select **Remove This Tab**.

Changing the order of tabs

You can organize your tabs by changing the order of the tabs.

Procedure

1. Click the **Actions Menu** icon and select **Order Tabs**.

   Tip: Alternatively, you can right-click on the workspace and select **Order Tabs**.
2. On the Order Tabs dialog box, use the arrows to change the order of your tabs.

Using the global area

Use the global area to add objects that you want to make common to all the tabs in your workspace. The objects that you can add are slider filters, select value filters, action buttons, and report parts such as prompts. To add a prompt, expand the report that contains the prompt and drag the prompt to the global area.

The global area is available on-demand and is located opposite the Content pane. When you launch the Getting Started page, the global area is collapsed. You can expand the global area in the following ways:

- On the Getting Started page, click the **Create New** button. On the edge of the workspace, opposite the Content pane, click the middle of the collapsed global area.

- On the Getting Started page, click the **Open Existing** button. Open a workspace. On the edge of the workspace, opposite the Content pane, click the middle of the collapsed global area.

If you change the position of the Content pane from one side of the workspace to the other, the change will take effect when you refresh the browser.

To add IBM Cognos content to the global area, drag objects from the Content and Toolbox tabs. You can also right-click an object in the Content pane and select **Insert in Global Area**. You cannot drag content objects from a tab to the global area, and you cannot drag objects from the global area to a tab.

Widgets that communicate, for example sliders, select value filters, and report prompts, will communicate with all the widgets that are listening on all the tabs by default.

To resize or collapse the global area, move the mouse over the outside edge of the global area to activate the bar, then drag the bar to resize or click the middle of the bar to collapse.

Saving workspaces

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

When you save a workspace for the first time, a copy of each report widget is created for the saved workspace. After you open and change the report (for example, you apply a sort), the changes are saved in this copy. For information on how to find the original report that was dragged onto the workspace, see "Resetting report content" on page 78. For information on how to update the workspace after the original report is modified, see "Opening a workspace with a new version of a report" on page 78.

The data in a report widget is not saved with the workspace. If the report widget is based on a live report, fresh data is retrieved from the data source when you open the workspace. For more information, see "Viewing report versions" on page 88.

Save a workspace

Save a workspace to preserve your changes.

Procedure

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

Save a workspace using a different name or location

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

Procedure

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

Editing widget properties

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

Procedure

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

   Note: After you add a widget to the workspace, the properties dialog box contains two tabs: a **Title** tab and another content tab, depending on the selected widget.
2. Click the **Title** tab and set the title properties, as described in the following table.

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

Property	Description
Widget title	Specifies the title of the widget. If no title is specified, the report name is used. For translated versions of the workspace, you can show this title on the widget for other languages when the widget title is not specified in the other language. To do so, select the **Use title as default for other languages** option. Widget titles are only displayed on widgets if you select the **Show Titles** option in the **Widgets** tab of the **Edit Workspace Style** dialog box or if you selected the **Show title on this widget** option in the widget properties. By default, widget titles are disabled. For more information, see "Workspace style" on page 51. For information on authoring workspaces for use in multiple languages or locales, see "Creating multilingual workspaces" on page 55.

3. Click the **Content** tab, set the properties, and click **OK**. For descriptions of the widget properties, refer to the appropriate section in the "Adding toolbox widgets" on page 36 topic.

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

Configuring widget communication

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

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

The results of actions in the source widgets are shown in the associated target widget. For example, you can configure an image widget to broadcast a specified URL in the web page widget when the image is clicked. Or, if you have two report widgets that contain content based on the same dimensionally-modelled data source, when you drill on the data in one report, the second report is updated based on your interactions in the first report. For more information, see "Automatic synchronization of drill up and drill down" on page 87.

Communication occurs between the following source and target widgets.

Restriction: Active report widgets can listen to report widgets. However, report widgets cannot listen to active report widgets.

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

Related tasks:

"Filtering with slider filter and select value filter widgets" on page 72
Use the filter widgets in your workspace to filter table and chart data in the report widgets that the filter widgets communicate with.

Widget to widget communication

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

For more information, see "Report content" on page 21, "Adding an image widget" on page 36, "Adding an RSS feed widget" on page 38, "Adding a My Inbox widget" on page 37, and "Adding a web page widget" on page 44.

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

Disabling widget communication

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

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

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

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

Widget event name	Type of widget that broadcasts the event	Result of disabling the widget event
Drill	Report	If disabled, communication stops between synchronized drill up and drill down and other widgets.
Prompt	Report	If disabled, communication stops between report prompts in a report and other widgets.
Filter	Slider filter or select value filter	If disabled, communication stops between a report widget and a filter.
Get filter items from widgets	Slider filter or select value filter	If disabled, a report widget will not receive this event from the source (slider or select value) filter. The filterable items of the report do not show up in the filter properties dialog box.
Get filter values from widgets	Slider filter or select value filter	If disabled, a report widget will not receive this event from the source (slider or select value) filter. The data item values of the report do not show up in the filter properties dialog box.

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

Procedure

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

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

Modifying the workspace layout

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

Resize individual widgets

You can resize widgets to fit content.

Procedure

On the widget toolbar for the widget you want to resize, click the **Resize to Fit Content** icon .

Set the workspace layout

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

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

- **Fit All Widgets to Window**

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

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

Procedure

1. Click the **Layout and Style** menu button on the application bar.
2. From the drop-down list, click either **Fit All Widgets to Window** or **Arrange All Widgets to Fit Content**.
3. If you click **Arrange All Widgets to Fit Content**, select **Current Tab** or **Global Area**.

Results

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

Workspace style

You can change the visual appearance of the workspace and widgets.

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

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

Changing the background of the workspace

You can edit the workspace style to change the visual appearance of the workspace.

Procedure

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

   Tip: You can also select the option from the workspace **Actions Menu**.
2. Click the **Tabs and Global Area** tab.
3. To change the background for all tabs and the global area, complete one or more of the following actions:

a. To change the color, click **Set Color** from the **Color** property. In the **Set Color** window, click the **Palette** tab to choose a color from the predefined palette or click the **Custom** tab to set specific colors. Then click **OK**.

b. To add an image to the background, select **Set Image** from the **Image** property. In the **Set Image** window, specify the URL of the image, the tiling options, and the alignment position options. Then click **OK**.

   Click **Preview** if you want to quickly verify that the URL address is correct.

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

c. To reset the properties to the initial settings, click **Reset to default**.

4. Click **OK**.

Formatting all widgets

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

Procedure

1. On the application bar, click **Layout and Style**  and click **Edit Workspace Style**.
2. Click the **Widgets** tab.
3. To change the background for the widgets, complete one or more of the following actions:
   a. To change the color, click **Set Color** from the **Color** property. In the **Set Color** window, click the **Palette** tab to choose a color from the predefined palette or click the **Custom** tab to set specific colors. Then click **OK**.
   b. To add an image to the background, select **Set Image** from the **Image** property. In the **Set Image** window, specify the URL of the image, the tiling options, and the alignment position options. Then click **OK**.

      Click **Preview** if you want to quickly verify that the URL address is correct.
   c. To show the title bar, select the **Show Titles** check box. You can change the font and size for the titles.
   d. To add and format the border, select the **Borders** check box. You can change the location, the color, style, and width of the border.
   e. To reset the widget style properties to the initial settings, click **Reset to default**.
4. Click **OK**.

Overriding global settings

You can override the settings that you specified in the **Edit Workspace Style** window. You can change the background of the tabs and the global area. You can change the appearance of the widgets in the tabs or in the global area.

Procedure

1. To override the settings for the background of the tabs or the global area, complete the following actions:
   a. Begin with one of the following actions:
      - If you want to change the background of the tabs, right-click in the background of the tab and click **Edit Tab Style**. Then click **Tab**.

    - If you want to change the background of the global area, right-click in the background of the global area and click **Edit Global Area Style**. Then click **Global Area**.

   b. Select the **Override the Tabs and Global Area settings selected in the Edit Workspace Style dialog box** check box.

   c. To change the color, click **Set Color** from the **Color** property. In the **Set Color** window, click the **Palette** tab to choose a color from the predefined palette or click the **Custom** tab to set specific colors. Then click **OK**.

   d. To add an image to the background, select **Set Image** from the **Image** property. In the **Set Image** window, specify the URL of the image, the tiling options, and the alignment position options for the image. Then click **OK**.

   e. Click **OK**.

2. To override the settings for the formatting of the widgets, complete the following actions:

   a. If the widgets are in the tab, right-click in the background of the tab and click **Edit Tab Style**. If the widgets are in the global area, right-click in the background of the global area and click **Edit Global Area Style**.

   b. To change the color, click **Set Color** from the **Color** property. In the **Set Color** window, click the **Palette** tab to choose a color from the predefined palette or click the **Custom** tab to set specific colors. Then click **OK**.

   c. To add or change the image, select **Set Image** from the **Image** property. In the **Set Image** window, specify the URL of the image, the tiling options, and the alignment position options. Then click **OK**.

   d. To show or hide the title bar, select the **Show Titles** check box. You can change the font and size for the titles.

   e. To change the border, select the **Borders** check box. You can change the location, the color, style, and width of the border.

   f. Click **OK**.

Setting personal preferences

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

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

Procedure

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

Setting	Description
Enable accessibility support for reports	Determines if accessible report output is generated. For more information, see “Making reports accessible to users with disabilities” on page 86.

Setting	Description
Show the Getting Started Page at startup	Shows or hides the Getting Started page when you launch Cognos Workspace.
Product language	Specifies the language that the IBM Cognos user interface uses. It applies to all IBM Cognos components, such as IBM Cognos Connection, IBM Cognos Viewer, and IBM Cognos Report Studio. For information on authoring workspaces for use in multiple languages or locales, see “Creating multilingual workspaces” on page 55.
Content language	Specifies the language used to view and produce content in IBM Cognos, such as names and descriptions of entries, or data in reports.
Time zone	Specifies the time zone used. Select the default server time zone set by your administrator. For more information, see the *IBM Cognos Business Intelligence Installation and Configuration Guide*. Or you can select another time zone. **Note:** The time zone for time stamps on comments is based on this setting.

Creating accessible workspaces

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

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

The following are some design considerations for creating accessible workspaces:
- Use IBM Cognos report content that was created using accessibility principles.
- Avoid using visual cues, such as bold text or color, to convey important information.
- Avoid using pictures and OLE Objects, as these items are tagged as artifacts and ignored by the screen reader.
- Avoid using conditional formatting to convey important information.
- Ensure that there is a table corresponding to display types that are rendered as images because the screen reader ignores this information.
- Always ensure that there is a title on the widget or workspace.
- Understand how screen reading technology works so you can create workspaces that are properly read by screen readers.
- Avoid spelling and grammar errors, as they cause the screen reading software to misinterpret the information.

- Avoid using features like calendar boxes and up and down selections on time controls. Using prompts such as check boxes, radio buttons, combo boxes, and multi-select boxes is acceptable.
- Ensure that the target application is accessible when using embedded web applications or drill-through paths.
- Avoid using large, complex tables. Displaying the information in multiple simple tabular reports is more manageable for users of assistive technology.

IBM Cognos Workspace has accessibility features that help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products successfully. For more information, see "Accessibility features in Cognos Workspace" on page 115.

Creating multilingual workspaces

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

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

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

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

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

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

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

Procedure

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

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

Language and locale

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

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

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

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

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

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

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

Widget content	Example
Maps	For a retail chain with stores in Canada, USA, and the UK (all English-speaking countries and regions), the locale will affect which map is shown.
Flags	An image in the workspace might contain a country's or region's flag.
Currency	The reported currency might be different and text on the workspace might indicate “values reported in US Dollars” or “values reported in Euros”.

Localize fixed content

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

Procedure

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

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

Localizing filter content

In some cases, slider filters and select value filters sometimes incorrectly filter the data for a new locale. To ensure that filtering works correctly, configure these filters when you create a new locale for a workspace.

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

- The data might be filtered correctly but the information bar shows values in the wrong language.
- The data might be unfiltered.

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

Procedure

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

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

Localize report content

You can edit reports to make them multilingual.

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

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

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

Procedure

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

Prompt controls

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

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

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

Enabling support for bidirectional languages

The bidirectional features supported by IBM Cognos Business Intelligence include bidirectional text, digit shaping, and object direction in reports.

About this task

Arabic, Hebrew, Urdu, and Farsi are languages written from right-to-left, using the Arabic or Hebrew scripts. However, numbers in those languages, as well as embedded segments of Latin, Cyrillic, or Greek text, are written from left to right. Using bidirectional settings in IBM Cognos Workspace, you can control the direction of this type of text. This affects entry names, descriptions, labels and tooltips, input boxes, comments, and structured text, such as email addresses, file paths, breadcrumbs, URLs, and date and time formats.

IBM Cognos Report Studio controls the following features that support bidirectionality in reports:

- Digit shaping, which is associated with rendering Arabic numbers.
- Base text direction of text content in reports.

- The direction of report objects, such as charts, lists, or maps.

For more information about bidirectional settings in Report Studio, see the *IBM Cognos Report Studio User Guide.*

Use the following procedure to enable bidirectional support in Cognos Workspace. By default, bidirectional support is disabled for users.

Procedure

1. On the application bar, click the **Actions Menu** button  and click **My Preferences**.
2. In the Set Preferences window, select the **Enable bidirectional support** check box.
3. Select one of the following options from the **Base text direction for content** list to specify the text direction in Cognos Workspace:
   - **Contextual**

     When this setting is used, the text direction depends on the first letter in the text. If the letter belongs to a right-to-left script, the text direction is right-to-left. Otherwise, the text direction is left-to-right. Numbers and special characters do not influence the text direction. For example, if the text starts with a number followed by an Arabic letter, the direction is right-to-left. If the text starts with a number followed by a Latin letter, the direction is left-to-right.
   - **Left-to-right**
   - **Right-to-left**
4. Click **OK**.

Unsupported features on mobile devices

The following features are not supported for workspaces that are viewed on mobile devices with IBM Cognos Mobile:

- Multi-page widgets in workspaces.

  Only the first page is shown for reports that are viewed on mobile devices or on the web portal.
- iWidgets.
- Workspace layout.

  Widgets are laid out sequentially in order.
- Prompted widgets.
- Slider controls.

For more information about IBM Cognos Mobile, see the *IBM Cognos Mobile Installation and Administration Guide*.

Chapter 4. Viewing and interacting with workspaces

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

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

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

Opening a workspace

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

Open a workspace from the Getting Started page

You can open a workspace from the Getting Started page.

Procedure

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

Open a workspace from the application bar

You can open a workspace from the application bar.

Procedure

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

Open a workspace from the Actions menu

You can open a workspace from the Actions menu.

Procedure

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

Open a workspace from the Content tab

You can open a workspace from the Content tab.

Procedure

In the **Content** tab, select the workspace to open and drag it onto the canvas.

Open a workspace from IBM Cognos Connection

You can open a workspace from IBM Cognos Connection.

Procedure

1. In IBM Cognos Connection, navigate to the workspace you want to open.
2. Click the hyperlink name of an existing workspace.

   The selected workspace opens in the IBM Cognos Workspace application.

Refreshing workspace widgets

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

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

Refresh all widgets

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

Procedure

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

Results

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

Refresh a single widget

You can refresh live data in an individual widget.

Procedure

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

Results

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

Sharing workspaces

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

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

Procedure

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

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

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

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

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

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

Displaying data in lists, crosstabs, and charts

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

Using the recommended display type

You can automatically choose the best display type for your data.

Procedure

1. Select the report or report part and, from the widget toolbar, click the **Change Display Type** button. The best display type for the data is displayed.
2. To see up to five of the most highly recommended display types, click the arrow next to **Change Display Type**.
3. To learn more about why the display types were recommended for your data, from the drop-down list, click **More**. In the **Change Display** dialog box, the **Recommended** tab shows the best display types for your data in order.
4. Select a display type to see why it is recommended.

Tip: The **All** tab shows all display types, including those that are not are not included in the recommended list.

Related concepts:

“Automatic chart recommendation” on page 3

In the widget toolbar, you can click Change Display Type to automatically get the best display type for the data. IBM Cognos Workspace analyses the data and produces the most suitable display type.

“Chart types”
There are many types of charts for presenting your data in a way that is meaningful to you and your users.

Related tasks:

“Exploring all display types”
You can explore all the display types that are available for reports and report parts, and change the display type.

Exploring all display types

You can explore all the display types that are available for reports and report parts, and change the display type.

Procedure

1. Select the report or report part and, from the widget toolbar, click the arrow next to **Change Display Type** .
2. From the drop-down list, click **More** to show additional display types.
3. In the **Change Display** dialog box, click the **All** tab to show all display types, including those that do not apply to your data.
4. Click the display type that you want to use, and click **OK**.

Related concepts:

“Chart types”
There are many types of charts for presenting your data in a way that is meaningful to you and your users.

Related tasks:

“Using the recommended display type” on page 63
You can automatically choose the best display type for your data.

Chart types

There are many types of charts for presenting your data in a way that is meaningful to you and your users.

To choose the appropriate type of chart, first define what you want the chart to communicate and then identify the most effective chart to suit that purpose.

Table 2. Types of charts

Purpose of the chart	**Type of chart to use**
Emphasize the magnitude of change over time	Area chart, line chart
Show trends over time	Area chart, column chart, line chart
Compare data	Bar chart, column chart, gauge chart
Show the relationship of parts to the whole	Pie chart, donut chart, stacked charts

Table 2. Types of charts (continued)

Purpose of the chart	Type of chart to use
Show the parts that contribute to the total	Stacked column chart
Show groups of related data	Bar chart, column chart
Highlight proportions	Pie chart, donut chart
Compare different kinds of quantitative information	Column chart, line chart
Show the distribution of data	Scatter chart, bubble chart, point chart

You can select the following formats for the chart types:

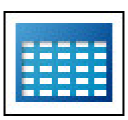
Standard
Standard charts compare specific values and represent discrete data, such as data for different regions or individual employees.

Stacked
Stacked charts compare the proportional contributions within a category, showing the relative value that each data series contributes to the total. The top of each stack represents the accumulated totals for each category.

100 percent stacked
100 percent stacked charts compare the proportional contributions across all categories, showing the relative contribution of each data series to the total. This format highlights proportions. When absolute values are required, use another format.

Three-dimensional
Three-dimensional charts are a visually effective display for presentations. When exact values are not important, such as for control or monitoring purposes, use another format. The distortion in three-dimensional charts can make them difficult to read accurately. Legacy chart formats support three-dimensional charts.

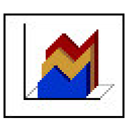
Crosstab or list tables



Table

Crosstab or list tables are useful for displaying data in rows and columns (crosstab) or in columns (list table), particularly large sets of data.

Area charts



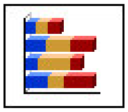
Area

Area charts are useful for emphasizing the magnitude of change over time. Area charts are also used to show the relationship of parts to the whole.

Area charts are like line charts, but the areas below the lines are filled with colors or patterns.

You can select the following formats: stacked, 100 percent stacked, or three-dimensional.

Bar charts

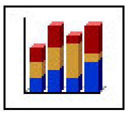
 Bar

Bar charts are useful for plotting many data series.

Bar charts use horizontal data markers to compare individual values.

You can select the following formats: standard, stacked, 100 percent stacked, or three-dimensional.

Column charts

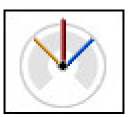
 Column

Column charts are useful for comparing discrete data.

Column charts use vertical data markers to compare individual values.

You can select the following formats: standard, stacked, 100 percent stacked, or three-dimensional.

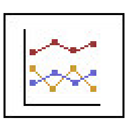
Gauge charts

 Gauge

Gauge charts are useful for comparing values between a small number of variables, either with multiple needles on the same gauge or with multiple gauges.

Gauge charts display data by using needles to show information as a reading on a dial. The value for each needle is easily read against the colored data range.

Line charts

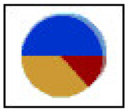
 Line

Line charts are useful for showing trends over time and comparing many data series.

Line charts plot data at regular points connected by lines.

You can select the following format: standard or three-dimensional.

Pie and donut charts


Pie, Donut

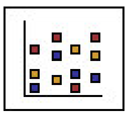
Pie charts are useful for highlighting proportions.

They use segments of a circle to show the relationship of parts to the whole. To highlight actual values, use another chart type, such as a stacked chart.

Pie charts plot a single data series. If you need to plot multiple data series, use a 100 percent stacked chart.

You can select the following formats: standard, donut, or three-dimensional.

Scatter, bubble, and point charts


Scatter, Bubble, Point

A scatter chart uses data points to plot two measures anywhere along a scale, not only at regular tick marks, and is useful for exploring correlations between different sets of data.

A bubble chart, like a scatter chart, uses data points and bubbles to plot measures anywhere along a scale. The size of the bubble represents a third measure, and the color represents a fourth measure. It is useful for representing financial data.

A point chart uses multiple points to plot data along an ordinal axis. It is the same as a line chart without the lines. Only the data points are shown. A point chart is useful for showing quantitative data in an uncluttered fashion. To display a point chart, the report object must contain at least one measure (numeric value).

Related concepts:

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

Related tasks:

"Exploring all display types" on page 64
You can explore all the display types that are available for reports and report parts, and change the display type.

"Using the recommended display type" on page 63
You can automatically choose the best display type for your data.

Supported chart formats

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

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

Related concepts:

"Chart types" on page 64
There are many types of charts for presenting your data in a way that is meaningful to you and your users.

Interacting with a chart

You can select a chart or one or more parts of a chart and apply actions. For example, you can drill up or down on a chart or filter the chart contents.

Procedure

1. Shift+click each part of the chart that you want to interact with.
2. Right-click and select the action that you want to perform:
   - Filter out unwanted data.
   - Sort in ascending or descending order.
   - Undo or redo a change.
   - Drill down or up
   - Go to another report.
   - Add simple calculations.
   - Delete the chart.
   - Group or ungroup identical values.
   - Swap rows and columns.
   - Change the display type.
   - View, add, edit, or remove comments.
   - View lineage information.
   - Access the IBM InfoSphere® Business Glossary.
   - Print the chart.
   - Export the chart.
   - View report versions.
   - Refresh the contents.
   - Change the prompt values.
   - Reset to the base report for a live report.

Sorting and filtering chart content

You can sort and filter chart content in reports. The information bar displays the filter and sort information in the chart.

Procedure

1. To filter chart data, do one of the following actions:
   - Use the slider filter and select value filter widgets.
   - Right-click the chart or a part of a chart such as a bar or column, and click **Filter**.
2. To sort chart data, right-click the chart or a part of a chart such as a bar or column, and click **Sort**.

Related tasks:

"Filtering with slider filter and select value filter widgets" on page 72
Use the filter widgets in your workspace to filter table and chart data in the report widgets that the filter widgets communicate with.

Change the chart color palette

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

Procedure

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

Results

The chart is displayed with the new color palette.

Swap rows and columns

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

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

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

Procedure

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

Results

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

Freezing column and row headings

When a report contains large lists or crosstabs, you can lock the column and row headings and scroll through the data while the headings remain visible. On a list report, you can freeze the column headings only. You cannot freeze headings that contain prompt controls.

Procedure

1. Right-click anywhere on a crosstab or list.
2. Select **Freeze Column Headings** or **Freeze Row Headings**.

   After you freeze a column or row heading, the size of the report changes within the widget. On the widget toolbar, click the Resize to Fit Content icon  to resize the widget to the report.

You can unfreeze columns by right-clicking anywhere on the report, and selecting **Unfreeze Column Headings** or **Unfreeze Row Headings**.

Results

If you freeze a column or row heading and save the workspace, the column or row headings are still frozen when you reopen the workspace.

Viewing column and row heading details

In a crosstab, you can expand a column or row heading to view the details that make up the data. For example, you might expand a region heading to display the cities for that region.

Important: If you apply a filter to a row or column and then expand that row or column, the filter might be removed. To check if the filter was removed, expand the information bar.

Procedure

1. To expand a heading in a column or row, right-click the heading you want to expand and select **Expand**.
2. To hide the expanded details, right-click the expanded heading, and select **Collapse**.

Related concepts:

"Displaying filter and sort values in the information bar" on page 76
The information bar displays the filter and sort details that are applied to a list, crosstab, or chart. It is displayed at the top of each applicable report object within the report widget when data is filtered or sorted.

Filtering report data

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

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

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

Filtering in the report widget

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

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

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

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

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

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

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

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

Filter report data

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

Procedure

1. Within a report, click the data value or values on which you want to filter.
2. On the toolbar, click the filter button or click the filter item in the context menu.
3. Select a filter condition from the list.

   The filter is applied to the report. The filter details are displayed in the information bar.

Remove individual filters using the information bar

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

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

Procedure

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

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

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

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

For more information, see “Displaying filter and sort values in the information bar” on page 76.

Remove all filters in a report widget

You can remove all the filters for a widget.

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

Procedure

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

Filtering with slider filter and select value filter widgets

Use the filter widgets in your workspace to filter table and chart data in the report widgets that the filter widgets communicate with.

Procedure

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

Results

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

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

Related concepts:

"Configuring widget communication" on page 48
Widgets communicate with each other by default. For example, content in report widgets can interact with each other as well as the slider filter and select value filter widgets. The slider filter and select value filter widgets dynamically filter report data that is contained in associated report widgets.

Related tasks:

"Sorting and filtering chart content" on page 68
You can sort and filter chart content in reports. The information bar displays the filter and sort information in the chart.

"Adding a select value filter widget" on page 39
You can use the select value filter widget to dynamically filter report data. Use this widget to filter data items, such as product or country and region name or single or multiple text values.

"Adding a slider filter widget" on page 41
Use this widget to dynamically filter data in report widgets. Filtering removes unwanted data from a report. For example, using the slider filter, you can retrieve data for revenue that is between 10,000 and 20,000.

Sorting data in lists, crosstabs, and charts

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

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

Sorting lists

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

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

Procedure

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

   Tip: You can also pause the pointer over the column heading and click on the **Sort Ascending** or **Sort Descending** arrows to sort in ascending or descending order.

Results

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

Sorting crosstabs

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

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

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

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

Sorting by label

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

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

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

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

Procedure

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

Sorting by value

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

Sorting by value affects the measure values for a selected row or column. For example, a crosstab contains an “expense plan total” value in a column, region values in the rows, and “course cost” as the measure. You select “expense plan total”, click the sort button and sort by value in descending order. The revenue values in the “expense plan total” column are sorted in descending order.

Training crosstab

Course cost	Expense plan total	Difference	Percent of Plan
GO Central Europe	399,300	34,800	109%
GO Asia Pacific	390,200	39,650	110%
GO Accessories	373,600	49,350	113%
GO Americas	331,700	59,900	118%

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

Procedure

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

   For example, to sort a set in the row axis, select a member or measure in the column axis.
2. Click the sort button and click **Sort by Value - Ascending** or **Sort by Value - Descending**.

Sorting charts

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

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

Sort a chart by label

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

Procedure

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

Sort a chart by value

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

Procedure

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

Remove sorts with the sort button

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

Procedure

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

Remove sorts using the information bar

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

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

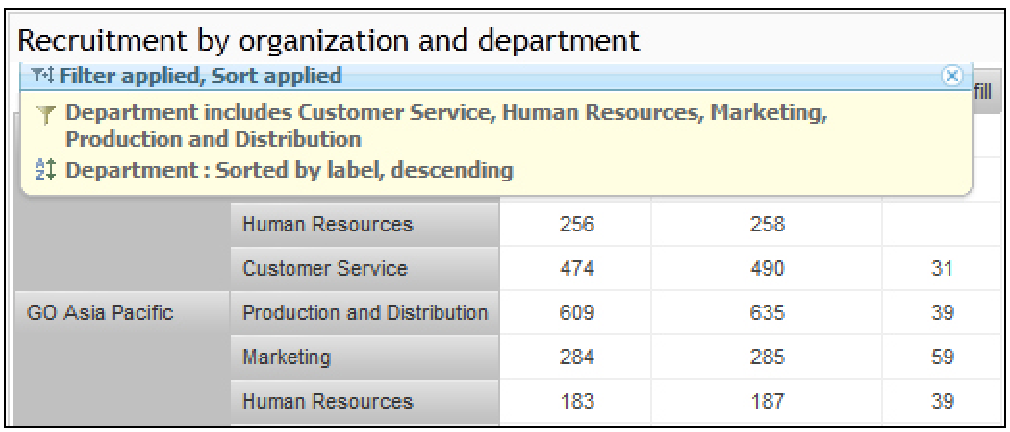
Procedure

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

Displaying filter and sort values in the information bar

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

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



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

If a widget that contains filter and sort information is printed or exported to a PDF file or is exported to a Microsoft Excel file, the information contained in the information bar is also printed or exported to the file. For more information, see "Creating PDF files from workspace widgets" on page 84 and "Export a workspace widget" on page 86.

Filters

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

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

You can remove some filter conditions from the information bar if a delete button is displayed beside the condition. For more information, see "Remove individual filters using the information bar" on page 71.

If a filter condition appears in grey or it has a lock icon , the filter cannot be removed from the information bar. For example, if a report author applies a filter using Report Studio or Analysis Studio, that filter cannot be removed from the information bar. For more information, see "Filtering with slider filter and select value filter widgets" on page 72.

Sorts

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

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

You can remove sort conditions from the information bar if a delete button is displayed beside the condition. For more information, see "Remove sorts using the information bar" on page 76.

Related tasks:

"Viewing column and row heading details" on page 70
In a crosstab, you can expand a column or row heading to view the details that make up the data. For example, you might expand a region heading to display the cities for that region.

Changing the prompt values in a report

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

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

You cannot use cascading prompts in IBM Cognos Workspace.

Procedure

1. Select the report widget that contains the prompted report content.

2. Click the **Widget Actions** button and click **Prompt Again** from the drop-down list.
3. Select new prompt values from the prompt control.

Resetting report content

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

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

Procedure

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

Opening a workspace with a new version of a report

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

For example, a report author might modify a report in IBM Cognos Report Studio. When you open the saved workspace that references the modified report, the information icon indicates that a new version of the report is available. The icon is displayed only if the report or report part is live and you are the workspace owner. The icon is not displayed for saved output or if you are not the workspace owner.

Procedure

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

Adding simple calculations in lists and crosstabs

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

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

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

The following operations are available when you create a calculation in Cognos Workspace.

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

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

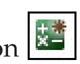
Note: The available operations depend on the selected data. For example, if only one row or column heading is selected, you can perform operations using a constant. If two or more column or row headings are selected, you can perform addition, subtraction, multiplication, division and percentage difference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

Add a simple calculation

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

Complete the following steps to add a simple calculation.

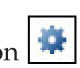
Procedure

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

Results

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

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

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

Delete a calculation

You can delete calculations.

Procedure

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

Grouping identical values that are in a list report

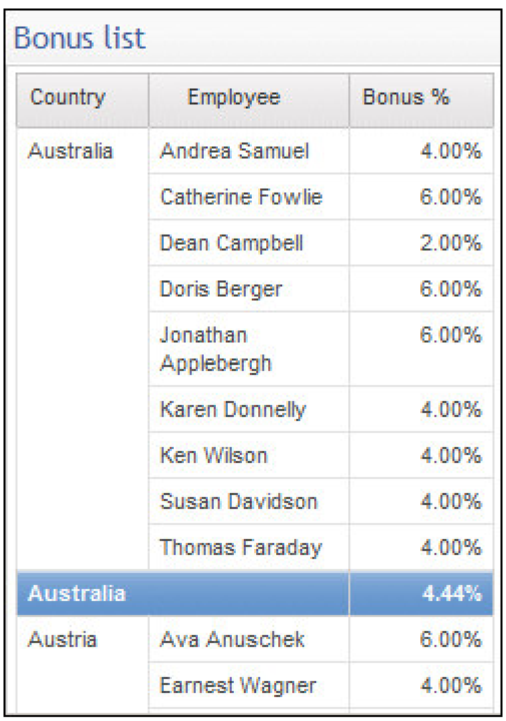
If a column in a list report contains multiple instances of the same value, you can group these identical values together.

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

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

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

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

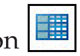


Bonus list

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

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

Procedure

1. Within a list report or report part, click the column heading or data value of the report item by which you want to group.
2. On the toolbar, click the group/ungroup button .

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

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

Reordering list columns

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

Procedure

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

Renaming list columns

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

Procedure

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

Providing quick access to your favorite workspaces and reports

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

You can also filter the objects displayed in the **Content** tab to view all of the workspaces and reports in your **My Favorites** list. For more information on filtering in the **Content** tab, see “Viewing My Favorites” on page 82.

Adding a workspace or report to My Favorites

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

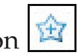
Add a workspace to My Favorites from the application bar

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

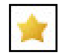
Before you begin

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

Procedure

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

Results

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

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

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

Procedure

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

Viewing My Favorites

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

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

Procedure

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

Opening a workspace or report from My Favorites

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

Procedure

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

Removing a workspace or report from My Favorites

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

Remove a workspace from My Favorites by using the application bar

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

Procedure

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

Results

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

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

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

Procedure

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

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

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

Procedure

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

Results

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

Printing a workspace

Use the print preview feature in your web browser to adjust the print options and print a workspace.

About this task

The print preview feature in a web browser allows you to adjust settings such as scaling and orientation to make your workspace fit on a printed page. If your workspace has multiple tabs, repeat the following steps for each tab that you want to print. Printing a workspace will print the current tab and the global area only.

Tip: To take full advantage of the print feature in IBM Cognos Workspace, use the Mozilla Firefox web browser.

Procedure

1. From the File menu in your web browser, select Print Preview.
2. Adjust the settings until you are satisfied with how the workspace fits on a page. For example:
   a. Change the orientation from portrait to landscape.

b. Reduce the scale to a smaller percentage.
c. Under Page Setup, enable the option that prints background colors and images.
3. Click Print from your web browser's print preview feature.

Creating PDF files from workspace widgets

You can print individual report widgets as PDF format.

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

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

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

Alternatively, you can export widgets to PDF to view them in Adobe Reader. For more information, see "Export a workspace widget" on page 86.

Procedure

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

Exporting workspace widgets to different formats

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

You must have execute permissions to use the export option.

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

Exporting to PDF format

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

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

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

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

Exporting to Microsoft Excel format

You can export your report output to several different Microsoft Excel spreadsheet software formats.

Excel 2007 and **Excel 2007 Data** formats render report output in native Excel XML format, also known as XLSX. This format 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.

Excel 2007 provides fully formatted reports for use in Microsoft Excel version 2007.

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 widths that are explicitly specified in reports are ignored in Microsoft Excel 2007.
- Merged cells are used to improve the appearance of reports.
- The default size of worksheets is 65 536 rows by 256 columns.

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

Excel 2007 Data provides data for use in Microsoft Excel version 2007. These reports only contain minimal formatting. Default data formatting is applied to the data based on data type and assumes that each column has a single data type.

The output is similar to other Excel formats, with the following exceptions:
- The generated output includes only the first list query in the report. If a report contains multiple queries and the first query is a multi-dimensional query for a crosstab or for a chart, an error message is displayed when the report runs.
- Nested frames and master-detail links are not supported.
- Cells in the Microsoft Excel file have a default width and height. You must adjust the column width and height if the data is larger than the default size.
- Style specifications are not rendered, including color, background color, and fonts.
- Borders are not rendered.
- User-specified data formatting in the report specification are not applied, including exception highlighting and color rules for negative numbers.

Excel 2002 provides fully formatted reports for use in Microsoft Excel versions earlier than 2007. Excel 2002 format also offers the following benefits:
- Spreadsheets are contained in a single file for reliable spreadsheet navigation.
- The maximum size of worksheets is 65,536 rows by 256 columns.

Exporting to CSV format

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

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

Before you export to CSV format, ensure that the following conditions exist:
- Charts must have at least one category or series.
- Reports must have only one query defined in the report, unless the additional queries are used for prompts.

Exporting to XML format

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

Before you export to XML format, ensure that the following conditions exist:
- Charts must have at least one category or series.
- Reports must have only one query defined in the report, unless the additional queries are used for prompts.

Export a workspace widget

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

Procedure

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

Results

The report content appears in the file format you chose.

For more information, see "Exporting workspace widgets to different formats" on page 84.

Making reports accessible to users with disabilities

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

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

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

Procedure

1. On the application bar, click the **Actions Menu** button and, click **My Preferences** from the drop-down list.

2. Select the **Enable accessibility support for reports** option.

   To disable accessible report output, deselect this option.
3. Click **OK** to save the setting and close the dialog box.

Drilling to view related data

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

In Cognos Workspace version 10.2.1 and later, dashboards retain their formatting and nesting characteristics when you drill up or down in workspaces.

Tip: To use the drilling method used in previous releases, your IBM Cognos administrator must create an **Advanced Setting** parameter in IBM Cognos Administration called **`VIEWER_CW_BACKWARDS_COMPATIBLE_DRILL`** and set its value to `true`. For more information about creating advanced settings, see "Advanced settings configuration" in the *IBM Cognos Administration and Security Guide*.

Drilling up or drilling down

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

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

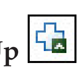
If you drill on a report item that uses a slider filter widget to filter table and chart data, the slider filter is not updated to the new drill level. If you want the slider filter to act on the new drill level, you must update the slider filter properties.

Important: In Cognos Workspace, you can drill up and drill down with only dimensionally structured data.

Before you begin

In the report, the report author must ensure that drill-up, drill-down, or both, are enabled and must specify that column titles use member captions.

Procedure

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

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

Automatic synchronization of drill up and drill down

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

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

By default, the communication between the report widgets is enabled. To turn off communication between the two report widgets, see “Widget to widget communication” on page 48.

Go to another target report

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

You can go to the following targets:
- An IBM Cognos Query Studio report
- An IBM Cognos Report Studio report
- An IBM Cognos Analysis Studio analysis
- An IBM Cognos Series 7 report
- A Microsoft Analysis Services report

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

By default, drilling through from a package is enabled.

Procedure

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

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

   If there is more than one possible target for the column, the **Go To** page appears, showing the available targets.
3. Click the target you want to navigate to.

   The target appears in IBM Cognos Viewer.

Viewing report versions

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

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

Procedure

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

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

Creating watch rules for specific conditions

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

Before you begin

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

You cannot create a watch rule on a data item in a saved HTML report when you view the saved HTML report in IBM Cognos Viewer. You must edit the properties of the report and choose the option to enable interactive properties when the report is run.

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

Procedure

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

What to do next

You must now set up the alert details for the watch rule. For more information, see "Defining alert details for watch rules" on page 90.

Creating watch rules for different condition status indicators

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

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

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

You cannot create a watch rule on a data item in a saved HTML report when you view the saved HTML report in IBM Cognos Viewer. You must edit the properties of the report and choose the option to enable interactive properties when the report is run.

Before you begin

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

Procedure

1. In the report widget that contains a saved HTML report version, click a numeric data item, right-click, and then click **Watch New Versions**, **Alert Using New Watch Rule**.
2. In the report, click a numeric data item, right-click, and then click **Alert Using New Watch Rule**.
3. In the **Specify the rule - Alert Using New Watch Rule** page, select **Send an alert based on thresholds**.
4. In the **Performance pattern** box, select which range of values to associate with "good performance" status.
5. In the **Threshold boundaries** box, specify the boundary values for the condition.

   Tip: For each boundary value, you can click the arrow attached to the numeric value box to adjust them follows:
   - To include the specified boundary value in the higher threshold, click the up arrow.
   - To include the specified boundary value in the lower threshold, click the down arrow.
6. Under **For the selected context**, select the report items to which the rule applies.
7. Click **Next**.

What to do next

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

Defining alert details for watch rules

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

You can choose one or more of the following options:
- **Send the report by email** if you want to be alerted by email
- **Publish a news item** if you want to be alerted by news item
- **Send a notification** if you want to alert other users by sending notifications to their task inbox

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

Procedure

1. In the **Specify the alert type - Alert Using New Watch Rule** page, specify which alerts to send when the rule is satisfied.

   Tip: To change the details for an alert type, click **Edit the options**.
2. If you have defined a watch rule for different condition status indicators, select the required check boxes to associate the alert with poor, average or good performance.

   Performance is defined by the performance pattern.

   Click **Next**.
3. In the **Specify a name and description - Alert Using New Watch Rule** page, specify a name, description, screen tip, and location for the watch rule.

   Tip: You can organize watch rules in folders on the **Rules** tab of the **My Watch Items** area of the portal.
4. Click **Finish**.

Viewing, modifying, or deleting a watch rule

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

For information about creating a watch rule, see "Creating watch rules for specific conditions" on page 89, and "Creating watch rules for different condition status indicators" on page 89.

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

Before you begin

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

Procedure

1. Select the widget that contains a saved HTML report version on the workspace.
2. On the report widget toolbar, click **Watch New Versions** and, while hovering over the watch rule, from the submenu click **Modify** to edit the watch rule.

   The **Set properties** dialog box appears.

   Tip: Click **Delete** to delete the watch rule.
3. Click the **General** tab to change properties, such as the language, name, and description of the watch rule.
4. Click the **Rules** tab to edit the rules properties, such as the conditional expression for the rule, the items to which the rule applies, and the alert type.

Results

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

Lineage information for a data item

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

Lineage is available only if your administrator configured it.

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

You can use the lineage tool that comes with IBM Cognos Business Intelligence. You can also use another lineage tool by specifying the URL to the tool in IBM Cognos Administration. If the URL source is secured, the source must be able to prompt users for a password because IBM Cognos BI does not pass security information.

IBM Cognos BI also supports the IBM Metadata Workbench as a lineage tool.

For more information about how to configure lineage and use lineage tools, see the *IBM Cognos Business Intelligence Administration and Security Guide*.

The IBM Cognos BI lineage tool

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

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

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

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

Viewing lineage information for a data item

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

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

Before you begin

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

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

Procedure

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

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

Results

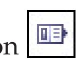
The lineage tool opens showing the lineage information of the selected data item.

Viewing information cards

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

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

Procedure

1. In the **Content** tab, click the show information card button .
2. When information cards are enabled, pause the pointer over objects in the **Content** pane **Content** tab, or in the **Open** or **Save As** dialog boxes to see the information card.

Creating a folder in the Content pane

You can create a new folder in the Content pane.

Procedure

1. Click the folder that you want to add a folder to. For example, click **My Folders**.
2. In the **Content** tab, click the new folder icon .
3. Type a folder name and click **OK**.

Renaming objects in the Content pane

In the Content pane, you can rename all objects except for report parts, **Public Folder**, **My Folder**, or any object that you do not have permission to rename.

Procedure

1. In the Content pane, right-click the object that you want to rename and select **Rename**.
2. Enter a new name and click **OK**.

Refreshing reports in the Content pane

In the Content pane, you can refresh all reports and folders that contain reports. You cannot refresh workspaces or report parts from the Content pane.

Procedure

In the Content pane, right-click the report that you want to refresh and select **Refresh**.

Deleting objects in the Content pane

In the Content pane, you can delete all objects except for report parts, **Public Folder**, **My Folder**, or any object that you do not have permission to delete.

Procedure

In the Content pane, right-click the object that you want to delete and select **Delete**.

Accessing the IBM InfoSphere Business Glossary

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

If you use the IBM InfoSphere Business Glossary, you can access the glossary from any of the following report data objects in a report widget:
- Query subject
- Query item
- Measure
- Dimension
- Hierarchy
- Level
- Property/attribute
- Top node member
- Member
- Level item

Procedure

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

Results

The IBM InfoSphere Business Glossary appears.

Embedding a workspace in an iframe to be viewed in an Internet Explorer 9 browser in Standards mode

You can embed a workspace within an HTML iframe and view it in an Internet Explorer 9 browser that is running in Standards mode. However, an administrator must first create a parameter in IBM Cognos Administration.

After the administrator creates the parameter, IBM Cognos Workspace works with current browser standard settings and encoding.

Important: If you enable Standards mode in Internet Explorer 9, the "Do More" and IBM Cognos Active Report features are not available in Cognos Workspace.

About this task

This task must be carried out by an administrator who has the appropriate permissions to change your IBM Cognos Business Intelligence application in IBM Cognos Administration.

Procedure

1. In Cognos Administration, on the **Configuration** tab, click **Dispatchers and Services**.
2. Click **Set Properties - Configuration**  .
3. Click the **Settings** tab then, in the **Environment** category, find the **Advanced settings** configuration setting.
4. Click **Edit**.
5. On the Set advanced settings - Configuration page, create a parameter that is called **`CW_USE_IE_COMPATIBILITY_MODE`** and set its value to `false`.
6. Click **OK**, then click **OK** again.

What to do next

You can now embed a workspace in an iframe for use in an Internet Explorer 9 browser that is running in Standards mode.

If your browser is still running in compatibility mode, you must modify settings in the Internet Explorer browser. Turn off the option to display intranet sites in compatibility view.

Chapter 5. Collaborating with Cognos Workspace

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

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

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

Collaborating by using comments

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

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

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

For more information, see “Collaborating by using IBM Connections activities” on page 100.

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

You can add, view, and edit comments on the following areas of the workspace:
- Reports or report parts
- Individual cells or data items in reports and report parts

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

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

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

Adding comments

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

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

When you add a cell-based comment, you should be aware of the following considerations:

- The comment belongs to the cell, not to its value.

  If the value of a cell changes after a report is refreshed, the previous comment still exists and is visible.
- The value of the cell is included in the comment text by default.

  If you include the value in the comment, and this value changes when the report is refreshed, the original value still exists in the previous comment. However, if you add another comment to the same cell, the updated value is included in the new comment text.
- The comment is specific to the cell in the current report only.

  If the same cell exists in another report, the comment is not linked.

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

If you have “read” access to a report, you can add information to an existing comment by editing it. The comment will show all content added by you and other users. For more information, see “Editing or deleting comments” on page 99.

Before you begin

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

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

Procedure

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

Results

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

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

Viewing comments

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

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

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

Procedure

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

Editing or deleting comments

You can edit or delete a comment that you added, if it is the most recent comment added to the report widget or individual cell.

After you delete a comment, you can delete the next most recent comment that you added to the workspace.

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

If you delete a report column or row that contains cell-based comments, the comments no longer appear. If you later restore the column or row using the **Reset** action from **Widget Actions** , the associated comments are also restored.

When a report is refreshed, if a report column or row that contains a comment was deleted from the data source, the comment no longer appears. When you drill down, filter, sort, or perform any other action to change what data is shown, the comment is not displayed until you return to the original data that contains the comment.

Procedure

1. Select the required report cell or report widget.
2. From the widget toolbar, click **Comment** .
3. Do one of the following actions:

- To edit a comment, click **Edit Last**, change the text, and click **Done**.
- To delete a comment, click **Delete Last**.

Collaborating by using IBM Connections activities

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

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

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

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

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

Starting a workspace activity

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

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

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

Before you begin

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

Procedure

1. On the workspace application bar, click the **Collaborate** menu button .
2. From the drop-down list, click **Start an Activity**.
3. In the **Title** box, type a brief description of the activity.
4. In the **Activity goal** box, type a description of what you want to achieve from the activity.
5. In the **Tags** box, add tag terms that allow users to search for the activity in Connections. Separate each term using a comma.

   For example, if the activity is related to sales figures for tents, you could add “tents” and "“camping equipment” as your tags.
6. If required, in the **Due date** box, enter the required completion date for the activity.
7. To include team members in the activity, expand **Member options**.

   Other users can see only the activity if they are added as members.
8. To add an individual user to the activity, first select the user role from the drop-down list. The access level options for each role are defined as follows:
   - **Author** - can view content and add entries (default).
   - **Owner** - can add content, view, and edit all entries.

     When you start an activity, you are automatically added as an owner.
   - **Reader** - cannot contribute to an activity; access is restricted to viewing content only.
9. Type the user's name in the box next to the user role, and then click **Add** .

   Repeat this step for each member you want to add.

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

   Note: Users can access only the activity if they have been added to it. You can change the activity membership in Connections after the activity has been created.
10. To use a template for the activity, expand **Template options**.
11. Click **Pick an Activity Template**, and then select a template from the list. Alternatively, if you do not want to use a template, select **None** from the list.

    If you pick a template when creating an activity, your new activity is based on another activity that already exists.

    Templates are only available if they have been created in Connections. You can create templates that contain a standard set of steps or processes that you want to follow. For example, a collaborative decision-making template could include sections for evidence, objectives, proposals, and decision.

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

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

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

      You can continue working on the workspace.

      Tip: You can return to the activity by selecting **View/Hide Workspace Activities** from **Collaborate** drop-down list.

Accessing IBM Connections from Cognos Workspace

You can access IBM Connections from IBM Cognos Workspace in several ways.

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

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

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

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

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

Adding members to an activity

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

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

Procedure

1. From Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity to which you want to add a member.
3. Click **Add Members** in the navigation pane.
4. To add an individual user to the activity, first select the user role from the drop-down list. The access level options for each role are defined as follows:
   - **Author** - can view content and add entries (default).
   - **Owner** - can add content, view, and edit all entries.

     When you start an activity, you are automatically added as an owner.
   - **Reader** - cannot contribute to an activity; access is restricted to viewing content only.
5. Type the user's name in the box next to the user role, and then click **Add** .

   Repeat this step for each member you want to add.

   Tip: If you are adding multiple members that belong to the same LDAP user group, you can quickly add all members by typing the user group name.
6. Click **Save**.

Changing the access for an activity

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

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

Procedure

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

Adding sections to an activity

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

Procedure

1. From IBM Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity to which you want to add the section.
3. Click **Add Section**.

4. In the **Section** box, type a brief description of the section.
5. Click **Save**.

Adding entries to an activity

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

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

Procedure

1. From IBM Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity and, if required, select the entry, to-do item, or section to which you want to add the entry.
3. Click **Add Entry**.
4. In the **Title** box, type a brief description of the entry.
5. Add the following types of content as required:
   - To attach a file, click **Attach File** .
   - To add a web address, click **Add Bookmark** .
   - To add a customized field, click **Add Custom Fields** , and then click the desired field type.

   For more information about adding content, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).
6. In the **Description** box, add further detail about the entry or the content.
7. In the **Tags** box, add tag terms that allow users to search for the entry in Connections. Separate each term using a comma.

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

   For more information about tags, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).
8. If required, in the **Section** drop-down list, select the section to which you want to add this entry.

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

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

      For more information about selecting members, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).
11. In the **Notify Message** box, add a comment that will appear in the notification that is sent to the selected members.
12. Click **Save**.

Working with to-do items in an activity

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

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

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

Creating to-do items for an activity

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

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

Procedure

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

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

   For more information on adding content, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).
9. In the **Description** box, add further detail about the item or the content.
10. In the **Tags** box, add tag terms that will allow users to search for the item in Connections. Separate each term using a comma.

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

    For more information on tags, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).
11. If required, in the **Section** drop-down list, select the section to which you want to add this entry.

    Note: A list of sections is only available if the sections have already been added to the activity.

12. To hide the entry from other activity members, select **Mark this entry private**.
13. To notify activity members about this entry, select **Notify people of this entry** and then select one of the following:
    - To notify everyone, select **All members of this activity**.
    - To notify specific members only, select each individual member.

      For more information about selecting members, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).
14. In the **Notify Message** box, add a comment that will appear in the notification that is sent to the selected members.
15. Click **Save**.

Marking to-do items as complete

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

Procedure

1. From IBM Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity and find the to-do item related to the completed task.

   Tip: To view a list of to-do items for the activity, click **To Do Items** in the navigation pane.
3. Select the check box adjacent to the required to-do item.

Results

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

Adding comments to an activity

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

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

Procedure

1. From IBM Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity, and select the entry or to-do item to which you want to add a comment.

   Tip: To respond to a comment, select the required comment.
3. Click **Add Comment**.
4. Add the following types of content as required:
   - To attach a file, click **Attach File** .
   - To add a web address, click **Add Bookmark** .

   For more information on adding content, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).
5. In the **Comment** box, add your comments.
6. To hide the entry from other activity members, select **Mark this entry private**.
7. To notify activity members about this entry, select **Notify people of this entry** and then select one of the following:

- To notify everyone, select **All members of this activity**.
- To notify specific members only, select each individual member.

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

  For more information about selecting members, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).

8. Click **Save**.

Marking activities as complete

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

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

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

Procedure

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

Saving an activity as a template

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

You access templates from the **Activity Templates** tab.

Procedure

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

   For example, if the template is related to the sales team, you could add “sales team” as your tag.

   For more information on tags, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).
7. In the **Starting page** drop-down list, select the type of view to display by default when a new activity is created using the template.
8. If you want to populate the template member list with the members defined in the activity, select **Use members from template**.
9. To add further members to the template, expand **Member options**.
10. To add an individual member, first select the member's role from the drop-down list, and then type the member's name in the box adjacent to the role. The access level options for each role are defined as follows:

- **Author** - can view content and add entries (default).
- **Owner** - can add content, view, and edit all entries.
- **Reader** - cannot contribute to an activity; access is restricted to viewing content only.

11. Click **Save**.
12. Review the template and make changes to it as required.

Tuning out of or in to an activity

By default, when an activity is started using IBM Connections, its priority is set to normal, and you are tuned in to it. If you tune out of an activity, you can no longer see it, although it is still visible to other members.

Tuned out activities are not visible to activity members in **My Activities** in Connections or in IBM Cognos Workspace. You can view them in Connections by clicking **Tuned Out Activities** in the navigation pane.

Once an activity is tuned out, you can reset the priority (normal, medium or high) by tuning in to it again.

Note: When an activity is tuned out in Connections, it disappears from the activity list in Cognos Workspace. The activity re-appears if you tune in to it again.

Procedure

1. To tune out of an activity, do the following:
   - From Connections, in the **Activities** tab, click **My Activities**.
   - Click the required activity.
   - Click **More Actions** in the title bar, and then click **Mark as Tuned Out**.
2. To tune in to an activity, do the following:
   - From Connections, in the **Activities** tab, click **Tuned Out Activities**.
   - Click the required activity.
   - Click **More Actions** in the title bar, and then click the required priority.

Opening a workspace from IBM Connections

You can open the workspace to which an activity is connected directly from IBM Connections. You can only view workspaces for which you have access.

Procedure

1. From Connections, in the **Activities** tab, click **My Activities**.
2. Click the activity for which you want to open the workspace.
3. Expand the entry named **IBM Cognos Workspace**, and then click the workspace link.

Viewing workspace activities

You can view a list of activities started by users with access to the workspace, and open them in IBM Connections.

When a workspace has activities associated with it, a red flag appears on the **Collaborate** menu button  and the number of activities available is shown in brackets on the **View/Hide Workspace Activities** menu button.

Note: When an activity is tuned out or marked as complete in Connections, it disappears from the activity list in IBM Cognos Workspace. The activity re-appears if you tune in to it again.

You can refresh the activity list in the Collaboration pane by clicking the **Refresh** button on the Collaboration pane toolbar.

You can close the Collaboration pane by clicking the **Close** button.

Before you begin

You can only view activities in IBM Cognos Workspace which are associated with the workspace that is open and for which you have access.

Procedure

1. On the workspace application bar, click the **Collaborate** menu button .
2. From the drop-down list, click **View/Hide Workspace Activities**.

   A list of all activities started for the workspace, for which you have access, appears in the Collaboration pane.

   For each activity shown you can see the activity title, the name of the user who performed the last update, and the date and time of the update. The activity priority and due date are also shown, if they have been set up.

   If you expand an activity, by clicking **More**, you can see a summary of the last three updates, and the activity goal.
3. Click an activity, or a specific entry within it, to open it fully in Connections.

Using IBM Connections to collaborate outside of a workspace

You can also use the additional enterprise social software capabilities provided by IBM Connections to collaborate with colleagues independently of the workspace environment.

For example, having used the collaboration capabilities on the workspace to investigate low sales figures for a product, your team may conclude that a new marketing campaign is required to promote the product. You decide to use Connections to continue your collaborative discussions with a wider network of colleagues.

Using Connections allows you to do the following:
- Develop, nurture, and remain in contact with your network of colleagues.
- Discuss and refine new creative ideas with communities of colleagues, partners, and customers.
- Respond quickly to business opportunities by calling upon the expertise in your network.

By allowing employees to easily connect with their networks, Connections can help organizations achieve the following benefits:
- Tasks can be completed faster through quick access to relevant information from an expanded network of professionals.
- Business decisions can be made with added confidence having consulted subject matter experts from across an organization.

- Innovation in products and services can be fostered as a result of the experiences and knowledge of communities of employees, partners and customers.

Connections provides the following services to help you draw upon the collective knowledge of your professional network of colleagues, partners, and customers.

- The Home page service provides a consolidated view of your social data from other Connections services.
- The Communities service allows you to stay in touch, share information, exchange ideas, and collaborate on projects with other individuals who share a common interest, responsibility or area of expertise.
- The Profiles service allows you to quickly find people by searching across your organization for people with the expertise and project experience that match your search keywords.
- The Activities service allows you to create online work areas where individuals in your network can gather emails, chats, documents, messages, and other information needed to accomplish a business objective.
- The Wikis service allows you to collaboratively enter, edit, and publish web page content.
- The Blogs service allows you to present your ideas, obtain feedback, and learn from the expertise and experience of others who blog.
- The Files service provides a convenient way to share documents, spreadsheets, presentations, and other types of files without using email.
- The Bookmarks social bookmarking service allows you to save, organize, and share bookmarks. It can also discover bookmarks that have been qualified by other users.

For more information, see the Connections Information Center (http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp).

Chapter 6. Samples

Sample reports are included with IBM Cognos Business Intelligence. When installed, you can find them in the Public Folders tab in IBM Cognos Connection.

The Sample Outdoors Company

The Sample Outdoors Company samples illustrate product features and technical and business best practices.

You can also use them for experimenting with and sharing report design techniques and for troubleshooting. As you use the samples, you can connect to features in the product.

For examples related to different kinds of businesses, see the product blueprints on the IBM Cognos Information Centers (http://pic.dhe.ibm.com/infocenter/cogic/v1r0m0/index.jsp).

The Sample Outdoors Company, or GO Sales, or any variation of the Sample Outdoors name, is the name of a fictitious business operation whose sample data is used to develop sample applications for IBM and IBM customers. Its fictitious records include sample data for sales transactions, product distribution, finance, and human resources. Any resemblance to actual names, addresses, contact numbers, or transaction values, is coincidental. Unauthorized duplication is prohibited.

Samples outline

The samples consist of the following:

- Two databases that contain all corporate data, and the related sample models for query and analysis
- Sample cubes and the related models
- A metrics data source including associated metrics and a strategy map for the consolidated company, and a model for Metric extracts.
- Reports, queries, query templates, and workspaces

  To run interactive reports, scripts are required. To see all the reports included in the samples packages, copy the files from the samples content installation into deployment folder and then import the deployments into the IBM Cognos Business Intelligence product.

Security

Samples are available to all users.

Samples in the GO Data Warehouse (analysis) package

The following IBM Cognos Workspace report is found in the GO Data Warehouse (analysis) package.

Employee Satisfaction Workspace

This report shows different measures for employee satisfaction, such as investment in training, employee survey results (by department and by topic, including a comparison with the planned survey results), and a list of bonuses for employees, sorted by country or region. The slider filter applies to the bonus list.

Samples in the GO Data Warehouse (query) package

The following workspaces are found in the GO Data Warehouse (query) package.

Marketing workspace

This workspace shows the results of different promotional campaigns.

The select value filter for campaign name applies to the first two charts. The product line select value filter applies to the advertising cost chart, and the year slider filter applies to the advertising cost crosstab.

Recruitment workspace

This workspace shows the recruitment results (average number of days to fill positions) for different indicators: by organization, department, branch, and year, and detailed information about the success of different recruiting techniques.

Two select value filters control three of the widgets.

Revenue data workspace

This workspace shows the revenue by country product type, and order method.

The country or region and product type are controlled by a select value filter.

Sales By Year workspace

This workspace shows different sales indicators for a year range controlled by the slider filter: profit margin, gross profit, product cost, quantity sold, revenue by region, and a comparison between actual and planned revenue.

The slider filter controls all widgets.

Tabbed workspace

This workspace shows a global area and three different tabs: revenue and sales data, human resources data, and financial data.

The global area has action buttons that help you go from tab to tab. There is also a slider filter on the global area that controls widgets on two of the three tabs.

Interactive samples

The following workspace is found in the Interactive Samples folder.

Sales workspace

This workspace shows different aspects of sales: gross profit by month, region, and product line, revenue by region, and the number of sales representatives that contributed to the sales.

The source objects are based on the GO Data Warehouse (analysis) package and the GO Data Warehouse (query) package. The Sales workspace is interactive: if you move the mouse over any of the widgets, a pop-up window displays ideas about how to improve the workspace.

Appendix. Accessibility features

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products successfully.

For more information about the commitment that IBM has to accessibility, see the IBM Accessibility Center (http://www.ibm.com/able).

Accessibility features in Cognos Workspace

There are several accessibility features in IBM Cognos Workspace.

The major accessibility features are described in the following list:

- You can use command keys, or shortcut keys, to navigate through Cognos Workspace. Shortcut keys directly trigger an action and usually use the Ctrl keys. For example, to save a workspace, press Ctrl+S.
- Cognos Workspace uses Web Accessibility Initiative—Accessible Rich Internet Applications (WAI-ARIA). This means that people with limited vision can use screen-reader software, along with a digital speech synthesizer, to listen to what is displayed on the screen.
- Cognos Workspace supports your system's display settings, such as high-contrast display.

To take full advantage of the accessible features of Cognos Workspace, use the Freedom Scientific JAWS screen-reader software with a Mozilla Firefox web browser.

To review an up-to-date list of the environments that are supported by IBM Cognos products, including information about operating systems, patches, browsers, web servers, directory servers, database servers, and application servers, see Supported Software Environments (http://www.ibm.com/support/docview.wss?uid=swg27037784).

Cognos Workspace has the following accessibility features that you can use to fit your individual needs:

- "Keyboard shortcuts"
- "Viewing a workspace in Microsoft Windows high contrast mode" on page 123

Keyboard shortcuts

A keyboard shortcut is an alternative way to invoke a command by pressing a combination of keyboard keys.

IBM Cognos Workspace uses both standard Microsoft Windows navigation keys and application-specific keys.

The following tables list the keyboard shortcuts in Cognos Workspace for each area of the user interface:

- "General" on page 116
- "Canvas" on page 118
- "Application bar" on page 120

- “Content pane” on page 120
- “Collaboration pane” on page 122
- “Lineage tool” on page 123

General

Applies to	Description	Keyboard shortcut
General	Perform the default action for an active command button.	Enter or Spacebar
General	Go to the first item or object.	Ctrl+Home
General	Go to the last item or object.	Ctrl+End
Screen area	Move forward through the open panes.	F6
Screen area	Move backward through the open panes.	Shift+F6
Screen area	Move to a successively higher toolbar, eventually ending on the first item in the top toolbar. For example, you move from the widget, to the widget toolbar, and then to the application bar.	F10
General controls	Move forward to the next control at the same level.	Tab
General controls	Move backward to the previous control at the same level.	Shift+Tab
Check boxes	Toggle a check box from selected to cleared or cleared to selected. **Tip:** This shortcut also applies to other settings that can have an on or off state (for example, information card control).	Spacebar
Radio buttons	Move to the next radio button and select it.	Right arrow Down arrow
Radio buttons	Move to the previous radio button and select it.	Up arrow Left arrow

Applies to	Description	Keyboard shortcut
Drop-down lists	Open and display the drop-down list contents.	Alt+Down arrow
Drop-down lists	Close an open drop-down list.	Alt+Up arrow
Tree controls	Move to the first selectable node below, or, if the node below has child nodes and the node is expanded, move to the first child node.	Down arrow
Tree controls	Move to the first selectable node above.	Up arrow
Tree controls	Expand the selected node or move to the first selectable child node.	Right arrow or + (plus sign)
Tree controls	Collapse the selected node, move to the parent node, or move to the first selectable node above.	Left arrow or - (minus sign)
Tree controls	Move to the first node in a tree control.	Home
Tree controls	Move to the last node in a tree control.	End
Menus	Move to and select the next available menu item.	Down arrow
Menus	Move to and select the previous available menu item.	Up arrow
Menus	Expand the child menu items and select the first available child menu item.	Right arrow
Menus	Collapse the child menu items.	Left arrow
Context menus	Open the context menu for the selected item.	Shift+F10
Context menus	Close an open context menu.	Esc
Scrolling	Scroll down.	Down arrow Page down

Applies to	Description	Keyboard shortcut
Scrolling	Scroll up.	Up arrow Page up

Canvas

Applies to	Description	Keyboard shortcut
Widget navigation	Move forward to the next widget on the same level within the canvas.	Tab
Widget navigation	Move backward to the previous widget on the same level within the canvas.	Shift+Tab
Widget navigation	Move to the first widget on the same level within the canvas.	Ctrl+Home
Widget navigation	Move to the last widget on the same level within the canvas.	Ctrl+End
Widget interaction	Move to the first report element at the child level of the current widget.	F12
Widget interaction	Move to the parent level of the current widget.	Shift+F12
Within-widget navigation	Move forward to the next report element in the widget.	Tab
Within-widget navigation	Move backward to the previous report element in the widget.	Shift+Tab
Within-widget navigation	Open the context menu for the selected cell.	Shift+F10
Within-widget navigation	Move the focus to a comment indicator (if available).	Ctrl+Alt+'
Within-widget comment navigation	Move the focus to the next comment in the widget.	Tab
Within-widget comment navigation	Move the focus to the previous comment in the widget.	Shift+Tab

Applies to	Description	Keyboard shortcut
Within-widget comment navigation	Open the current comment to get more information.	Enter or Space
Within-widget comment navigation	Return the focus to the cell that had focus before the focus was moved to a comment indicator.	Esc
Widget actions button	Move to the widget actions button for the selected widget. **Tip:** Pressing Esc returns to the selected widget.	F10
Widget properties	Open the properties for a selected widget or object.	Alt+Enter
Widget modes	Activate the move mode for the selected widget.	Ctrl+Shift+M
Widget modes	Move a widget. Use arrow keys to move the widget (up, down, left, and right); Ctrl+Arrow keys can move the widget in larger increments.	Arrow keys Ctrl+Arrow keys
Widget modes	Activate the resize mode for the selected widget.	Ctrl+Shift+R
Widget modes	Resize a widget by moving the bottom right corner of the widget.	Arrow keys Ctrl+Arrow keys
Widget modes	Leave the move or resize mode.	Enter Esc
Widget modes	In a text widget, change the base text direction to right-to-left or left-to-right.	Ctrl+D
Widget modes for Explore Point widgets	Show or hide a hierarchy. **Note:** Explore Point widgets are Explore Points exported from IBM Cognos Insight when a workspace is published to Cognos Workspace.	Ctrl+Shift+Q

Application bar

Applies to	Description	Keyboard shortcut
Application bar	Create a new workspace.	Ctrl+N
Application bar	Open a workspace.	Ctrl+O
Application bar	Save a workspace.	Ctrl+S
Application bar	Save a workspace as a new workspace.	Ctrl+Shift+S
Application bar	Open the help documentation.	F1
Application bar	Move forward to the next control in the application bar.	Tab
Application bar	Move backward to the previous control in the application bar.	Shift+Tab
Application bar	Move forward through the application bar controls.	Right arrow
Application bar	Move backward through the application bar controls.	Left arrow

Content pane

Applies to	Description	Keyboard shortcut
Navigation	Move to the search field. If it is not already open, the **Content** pane will display the search results.	Ctrl+F F3
Navigation	Close the **Content** pane and return to the canvas.	Ctrl+F4
Toolbar	Move to the first item in the toolbar within the **Content** pane.	F10
Toolbar	Move forward through the toolbar controls.	Tab
Toolbar	Move backward through the toolbar controls.	Shift+Tab

Applies to	Description	Keyboard shortcut
Toolbar	Move forward through the views and select a view.	Right arrow Down arrow
Toolbar	Move backward through the views and select a view.	Left arrow Up arrow
Insert	Insert the selected item into the canvas.	Ctrl+Shift+Enter
Paging	Move to the page controls.	Tab Shift+Tab
Paging	Go to the first page of the **Content** tab.	Home Ctrl+Shift+Page up Ctrl+Shift+Up arrow
Paging	Go to the last page of the **Content** tab.	End Ctrl+Shift+Page down Ctrl+Shift+Down arrow
Paging	Go to the next page in the **Content** tab.	Right arrow Ctrl+Page down
Paging	Go to the previous page in the **Content** tab.	Left arrow Ctrl+Page up
Content pane	Open or close the **Content** pane.	Ctrl+Shift+B
Content pane tabs	Move forward through the **Content** pane tabs. This keyboard shortcut does not work with Microsoft Internet Explorer.	Ctrl+Tab
Content pane tabs	Move backward through the **Content** pane tabs. This keyboard shortcut does not work with Microsoft Internet Explorer.	Shift+Ctrl+Tab
Information card	Display the information card as part of keyboard navigation of the content tree.	Shift+Alt+F9

Applies to	Description	Keyboard shortcut
Information card	Move focus to the first field in the information card.	Shift+Alt+F9 (in combination with the first Shift+Alt+F9 sequence)
Information card	Move forward and backward through the Information card fields.	Tab Shift+Tab
Information card	Follow a hyperlink in a information card field. The information card closes when the link is accessed.	Enter
Information card	Close the information card and return focus to the **Content** tab.	Esc

Collaboration pane

Applies to	Description	Keyboard shortcut
Collaboration pane	Open or close the Collaboration pane.	Ctrl+Shift+C
Collaboration pane	Move to the first item in the toolbar within the Collaboration pane.	F10
Activity list	Move up to the previous activity.	Up Arrow
Activity list	Move down to the next activity.	Down Arrow
Activity list	Select the first activity in the list.	Home
Activity list	Select the last activity title in the list.	End
Activity	Move forward to the next item shown in the activity.	Tab
Activity	Move backward to the previous item shown in the activity.	Shift+Tab

Lineage tool

Applies to	Description	Keyboard shortcut
View	Move focus to the next tab.	Tab
View	Move focus to the previous tab.	Shift+Tab
Screen area	Scroll the window contents up.	Up arrow
Screen area	Scroll the window contents down.	Down arrow
Screen area	Scroll the window contents to the left.	Left arrow
Screen area	Scroll the window contents to the right.	Right arrow
Node navigation	Move the focus to the node on the left of the current node.	Ctrl+Left
Node navigation	Move the focus to the node on the right of the current node.	Ctrl+Right
Node navigation	Move the focus to the node above the current node.	Ctrl+Up
Node navigation	Move the focus to the node below the current node.	Ctrl+Down
Node navigation	Move the focus to the previous item within the current node.	Alt+Up
Node navigation	Move the focus to the next item within the current node.	Alt+Down

Viewing a workspace in Microsoft Windows high contrast mode

Microsoft Windows users with low vision can make IBM Cognos Workspace easier to view by enabling high contrast mode.

For more information, see the documentation for your operating system.

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Glossary

This glossary includes terms and definitions for IBM Cognos Business Intelligence.

The following cross-references are used in this glossary:

- See refers you from a term to a preferred synonym, or from an acronym or abbreviation to the defined full form.
- See also refers you to a related or contrasting term.

To view glossaries for other IBM products, go to www.ibm.com/software/globalization/terminology (opens in new window).

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A

access permission
: A privilege that permits the access or use of an object.

accountability scorecard
: A scorecard that Metric Studio automatically builds for each user which contains the metrics and projects they own.

agent
: A process that performs an action on behalf of a user or other program without user intervention or on a regular schedule, and reports the results back to the user or program.

alias
: An alternative name used instead of a primary name.

anonymous access
: A type of access that allows users and servers to access a server without first authenticating with it.

application tier component
: For installation, the set of processors that access the query databases to gather information and then render the results as PDF and HTML reports and metrics. Application tier components also pass requests to Content Manager and render the results that Content Manager retrieves from the content store.

attribute
: In BI Modeling, a characteristic of an entity which is descriptive rather than a unique identifier or an aggregative measure.

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

authentication provider
: The communication mechanism to an external authentication source. Functionalities, such as user authentication, group membership, and namespace searches, are made available through authentication providers.

B

burst
: To create several report results by running a single report once. For example, the user can create a report that shows sales for each employee, and run it once, sending different results to regional managers by bursting on region.

burst key
: The dimension or level of a query in the report specification that is used to create, or burst, a set of report results.

C

CA
: See certificate authority.

calculated member
: A member of a dimension whose measure values are not stored but are calculated at run time using an expression.

canvas
: An area within a dashboard or workspace that users interact with to create, view, and manipulate content and data.

capability
: A group of functions and features that

can be hidden or revealed to simplify the user interface. Capabilities can be enabled or disabled by changing preference settings, or they can be controlled through an administration interface.

cardinality

1. For relational data sources, a numerical indication of the relationship between two query subjects, query items, or other model objects.
2. For OLAP data sources, the number of members in a hierarchy. The cardinality property for a hierarchy is used to assign solve orders to expressions.

cascading prompt
A prompt that uses values from a previous prompt to filter the values in the current prompt or pick list.

certificate
In computer security, a digital document that binds a public key to the identity of the certificate owner, thereby enabling the certificate owner to be authenticated. A certificate is issued by a certificate authority and is digitally signed by that authority. See also certificate authority.

certificate authority (CA)
A component that issues certificates to each computer on which components are installed.

CGI See Common Gateway Interface.

cipher suite
The combination of authentication, key exchange algorithm, and the Secure Sockets Layer (SSL) cipher specification used for the secure exchange of data.

class style
A combination of formatting characteristics, such as font, font size, and border, that the user names and stores as a set.

CM See Content Manager.

Common Gateway Interface (CGI)
An Internet standard for defining scripts that pass information from a web server to an application program, through an HTTP request, and vice versa.

condition
An expression that can be evaluated as true, false, or unknown. It can be expressed in natural language text, in mathematically formal notation, or in a machine-readable language.

constraint

1. A security specification that denies one or more users the ability to access a model component or to perform a modeling or authoring task.
2. A restriction on the possible values that users can enter in a field.

contact
A named email 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
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. During an interactive installation, the setup and configuration data must be entered, 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 email, 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 email 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 email 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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