Cognos® 8

COGNOS CONNECTION

USER GUIDE

Product Information

This document applies to Cognos® 8 Version 8.3 and may also apply to subsequent releases. To check for newer versions of this document, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

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Table of Contents

Table of Contents

Table of Contents

Introduction

This document is intended for use with Cognos 8. Cognos 8 is a Web product with integrated reporting, analysis, scorecarding, and event management features.

This document explains how to use Cognos Connection, the Cognos 8 portal, to view, edit, schedule, and distribute standard and complex reports.

Audience

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

Related Documentation

Our documentation includes user guides, getting started guides, new features guides, readmes, and other materials to meet the needs of our varied audience. The following documents contain related information and may be referred to in this document.

Note: For online users of this document, a Web page such as **The page cannot be found** may appear when clicking individual links in the following table. Documents are made available for your particular installation and translation configuration. If a link is unavailable, you can access the document on the Cognos Global Customer Services Web site (http://support.cognos.com). Logon credentials are available either from your administrator or by request from support.america@cognos. com.

Document	Description
Cognos 8 Administration and Security Guide	Managing servers, security, reports, and portal services; setting up Cognos samples; troubleshooting; and customizing Cognos 8
Analysis Studio User Guide	Exploring, analyzing, and comparing dimensional data
Cognos 8 Getting Started	Teaching new users how to use Cognos 8
Cognos 8 New Features	Describing features that are new in this release

Document	Description
Localization Development Kit Installation and User Guide	Installing and using the Localization Development Kit to translate and customize the messages and user interface text in Cognos products
Query Studio User Guide	Creating self-service business intelligence reports
Report Studio Professional Authoring User Guide	Authoring reports that analyze corporate data according to specific needs
Report Studio Express Authoring User Guide	Authoring financial reports that analyze corporate data according to specific needs
Event Studio User Guide	Creating and managing agents that monitor data and perform tasks when the data meets predefined thresholds
Framework Manager User Guide	Creating and publishing models using Framework Manager
Cognos PowerPlay Enterprise Server Guide	Administering PowerPlay servers and deploying cubes and reports to PowerPlay users in Windows environments or on the Web
Cognos PowerPlay Web User Guide	Viewing, exploring, formatting, and distributing PowerPlay reports using a Web browser
Cognos Web Portal User Guide	Viewing, finding, organizing, and sharing information in Upfront, the customizable interface used to publish Cognos reports to the Web
Metric Studio User Guide	Authoring scorecard applications and monitoring the metrics within them
Cognos 8 Go! Office User Guide	Using Cognos 8 Go! Office to retrieve content from Cognos reporting products within Microsoft Office

Finding Information

To find the most current product documentation, including all localized documentation, access the Cognos Global Customer Services Web site (http://support.cognos.com). Click the **Documentation** link to access documentation guides. Click the **Knowledge Base** link to access all documentation, technical papers, and multimedia materials.

Product documentation is available in online help from the **Help** menu or button in Cognos products. You can also download documentation in PDF format from the Cognos Global Customer Services Web site.

You can also read PDF versions of the product readme files and installation guides directly from Cognos product CDs.

Using Quick Tours

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

Getting Help

For more information about using this product or for technical assistance, visit the Cognos Global Customer Services Web site (http://support.cognos.com). This site provides product information, services, user forums, and a knowledge base of documentation and multimedia materials. To create a case, contact a support person, or to provide feedback, click the **Contact Us** link. For information about education and training, click the **Training** link.

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What's New?

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

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

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

To review an up-to-date list of environments supported by Cognos products, such as operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

New Features in Version 8.3

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

My Activities and Schedules

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

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

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

For more information, see "Activities Management" (p. 115)

My Watch Items

Use the **My Watch Items** area of the portal to view and manage alerts for new report versions and rules that you have set for conditional report delivery (p. 40). The **My Watch Items** functionality enables end users to monitor and manage business information that is critical to them from a single location.

As a report owner, you must allow report users to receive alerts and create watch rules for the reports. For information about how to enable these features for reports, see "Enable Watch Rules for a Report" (p. 85).

Report Alerts

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

Subscriptions are saved to the **Alerts** tab of **My Watch Items** (p. 40) and can be maintained from that location.

For information about how to subscribe to a report, see "Add Yourself to or Remove Yourself from an Alert List for a Report" (p. 84).

Watch Rules

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

To create a watch rule (p. 85), a saved report must be viewable in HTML format. You can select the data to be monitored and enter the threshold condition that will trigger the delivery of the report. Watch rules are saved to the **Rules** tab of **My Watch Items** (p. 40), and can be maintained from that location.

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

Drilling Through on Multiple Values

Drilling through is now more powerful and flexible. You can pass multiple items, such as products or countries, to a target report (p. 92). You can now use this feature regardless of the type of drill-through path that was created. Drilling through is automatically enabled when you select multiple values.

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

Go Directly to Target Report When Only One Target Report Exists

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

For more information, see "Drill Through to Another Target" (p. 91).

Saving Report Outputs to a File System

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

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

The export options appear as run options for a report, provided you were granted access to this feature. For more information, see "Save Report Output" (p. 81).

Resubmitting Failed Jobs and Reports

You can resubmit a failed job or report (p. 121). For example, you discover that 20 reports in a job containing 1,000 reports fail due to an invalid signon. The problem is corrected and the job is resubmitted so that only the 20 failed reports are rerun.

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

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

Default Actions for Agent Items

You can now choose a default action to use when an agent item is selected in Cognos Connection, rather than automatically opening the agent in Event Studio (p. 98). The new choices are:

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

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

Resubmitting Failed Agent Tasks

Failed agent tasks can now be resubmitted with their original data values (p. 121). In previous versions, if a task failed, the data passed to the task was lost. Rerunning the agent may not solve this problem if the task is set to process new events only.

Tabbed Portal Pages

You can now create pages with multiple tabs that are easy to navigate. The new type of pages is also referred to as dashboards. Dashboards are created by using a new portlet named Multi-page. For more information, "Create a Dashboard with Multiple Tabs" (p. 57).

Global Filters and Enhanced Portal Interactivity

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

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

For more information, see "Adding Interactivity to Pages and Dashboards" (p. 60).

Metric Studio Content in Portal Pages

A Cognos Connection page or a dashboard can now display more types of Metric Studio metrics and a history chart. This new content can be added by using the following new portlets:

* Metric List

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

* Metric History Chart

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

For more information, see "Pages and Dashboards" (p. 49).

Support for Microsoft Excel 2007

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

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

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

For more information about Excel format support, see "Excel Formats" (p. 77).

Changed Features in Version 8.3

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

Updated Cognos Connection Look

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

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

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

- The my area icon ⏏, which lets you access the **My Watch Items**, **My Preferences**, and **My Activities and Schedules** areas in Cognos Connection.

- The portal style named **Business**.

- The updated **Welcome to Cognos 8** page.

For more information, see "Personalize the Portal" (p. 37).

More Information in the Go To Page

Additional information was added to the **Related Links** page. **Related Links**, also known as the **Go To** page, is used to show users all of the drill-through paths available from a source report. The page now automatically shows more information, such as the target report and its location. This information helps you choose which drill-through path to use.

Cognos Watchlist Portlet

The Cognos Watchlist Portlet was replaced by the Metric List portlet. In the new portlet, the watchlist is now one of the selectable options "Pages and Dashboards" (p. 49).

Building Cognos 8 Applications

The lifetime of a Cognos 8 business intelligence application can be months, or years. During that time, data may change, and new requirements appear, so authors must modify existing content and develop new content, and administrators must update models and data sources as the underlying data changes. For more information about using data sources, see the *Administration and Security Guide* and the Framework Manager *User Guide*.

In a working application, the technical and security infrastructure and the portal are in place, as well as processes for change management, data control, and so on. For information about the workflow associated with creating Cognos 8 content, see the *Architecture and Deployment Guide*. For more information, see the Cognos Solutions Implementation Methodology toolkit, which includes implementation roadmaps and supporting documents. The Cognos SIM toolkit is available on the Cognos Global Services Web site, http://support.cognos.com/en/consulting/csim/index.html.

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┌─────────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐
│ Locate and prepare  │ ───▶ │ Build and publish   │ ───▶ │ Deliver the information │
│ data sources and models │  │ the content         │      │                     │
└─────────────────────┘      └─────────────────────┘      └─────────────────────┘
```
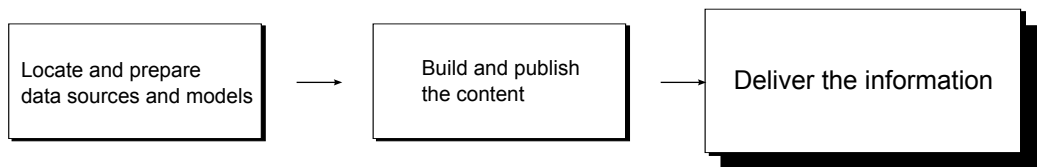
❑ locate and prepare data sources and models

Cognos 8 can report from a wide variety of data sources, both relational and dimensional. Database connections are created in the web administration interface, and are used for modeling, for authoring and for running the application.

To use data for authoring and viewing, the business intelligence studios need a subset of a model of the metadata (called a package). The metadata may need extensive modeling in Framework Manager.

❑ build and publish the content

Reports, scorecards, and so on are created in the business intelligence studios of Cognos 8. Which studio you use depends on the content, lifespan and audience of the report, and whether the data is modeled dimensionally or relationally. Report Studio reports and scorecards are usually prepared for a wider audience, published to Cognos Connection or another portal, and scheduled there for bursting, distribution, and so on. You can also use Report Studio to prepare templates for self-service reporting.

❑ deliver and view the information

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

For information about tuning and performance, see the *Administration and Security Guide* and the Cognos Global Services Web site, http://support.cognos.com.

Chapter 1: Cognos Connection

Cognos Connection is the portal to Cognos 8, the Web-based reporting solution. Cognos Connection provides a single access point to all corporate data available in Cognos 8.

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

You can use Cognos Connection to create and run reports and cubes (p. 67) and distribute reports (p. 88). You can also use it to create and run agents (p. 97) and schedule entries (p. 107).

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

Log On

Cognos 8 supports authenticated and anonymous user access. To use Cognos 8 as an authenticated user, you must successfully log on. During the logon process, you must provide your credentials, such as user ID and password, as required by your organization. Anonymous users do not log on.

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

Steps

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

2. If the namespace **Logon** page appears, in the **Namespace** box, click the namespace you want to use.

3. Click **OK** and type your user ID and password.

4. Click **OK**.

   Your session starts.

Log Off

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

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

Steps

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

You are now logged out of all the namespaces you were using.

2. Choose whether to log on again:

- If you do not want to log on again, close your Web browser.

- If you want to log on as an authenticated user, click **Log on again**.

- If you want to log on as an anonymous user, click **Open a session as an anonymous user**. This is available only if your administrator set it up.

Create a Shortcut

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

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

If you want to make a new entry, it might be easier to make a copy of an existing entry and modify it. If you want to run an existing agent or report with some minor changes, create an agent view or a report view . For example, to change the format, language, or delivery method of a report, create a report view.

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

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

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

Steps

1. In Cognos Connection, locate the entry you want to create a shortcut to.

2. Under **Actions**, click **More** and then click **Create a shortcut to this entry** 📑.

3. In the **Name** box, type the name of the shortcut.

4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

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

5. If you do not want to use the target folder shown under **Location**, choose another location:

- Click **Select another folder**, select the target folder, and click **OK**. If the folder box is empty, go back one folder level using the path at the top of the dialog box.

- Click **Select My Folders** as the location.

6. Click **Finish**.

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

Create a URL

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

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

Steps

1. In Cognos Connection, go to the folder where you want to create the new URL.

2. Click the new URL button on the toolbar.

3. In the **Name** box, type the name of the new URL.

4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

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

5. In the **URL** box, type the URL location.

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

6. If you do not want to use the target folder shown under **Location**, choose another location:

7. • Click **Select another folder**, select the target folder, and click **OK**. If the folder box is empty, go back one folder level using the path at the top of the dialog box.

   • Click **Select My Folders** as the location.

8. Click **Finish**.

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

Bookmark an Entry

You can bookmark a Cognos 8 entry in your Web browser so that later you can quickly perform the default action associated with the entry. For example, using a report bookmark, you can view the most recent report output, run the report, or open it in an authoring tool. For more information, see "Set Default Report Options" (p. 68).

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

Some default actions are available only to users who

- have the required access permissions for the entries.

- have the required product components installed.

- have access to specific, secured functions and features.

  For example, the capabilities to use a specific Cognos 8 studio.

- use specific Web browsers.

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

Steps for Internet Explorer

1. In Cognos Connection, locate the entry for which you want to create a bookmark.

2. In the **Actions** column, click **More**.

3. In the list of actions available for this entry, click **Add to bookmarks** 📖 .

   The Internet Explorer box for adding favorites appears.

4. Create the bookmark as you normally do in Internet Explorer.

Steps for All Web Browsers

1. In Cognos Connection, locate the entry for which you want to create a bookmark.

2. In the **Actions** column, click the set properties button 🖼 for the entry.

3. On the **General** tab, click **View the search path, ID and URL**.

4. Right-click the link that appears under **Default action URL**.

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

   A menu box specific to your Web browser appears.

5. From the menu, click the option for creating bookmarks.

   For example, if you are using Internet Explorer, click **Add to Favorites**. If you are using Firefox, click **Bookmark This Link**.

6. Create the bookmark as you normally do in your Web browser.

Models and Packages

Models and packages use corporate business rules to define and group the data to be used for business reporting.

A model is a data structure containing imported data from one or more data sources. Cognos 8 users responsible for data modeling use Framework Manager to create models.

The data modeler creates a package that defines a subset of data that is relevant to an intended group of users. For example, the data modeler may create a package that marketing managers use for information related to market research. The package can then be distributed to report authors by publishing it to the portal. When you run a report, the result set is defined by the data retrieval information defined in the package.

In Cognos Connection, you can manage packages the way you manage other entries. For example, you can organize packages in folders, create shortcuts to packages, and move or copy packages.

For more information about models and packages, see the Framework Manager *User Guide*.

Entry Properties

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

General Properties

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

Property	Description
Type	The type of entry.
Owner	The owner of the entry. By default, the owner is the person who created the entry. When the owner no longer exists in the namespace, or is from a different namespace than the current user, the owner shows as **Unknown**. If you have Set policy permissions, click **Make me the owner** to become the owner of the entry.
Contact	The person responsible for the entry. Click **Set the contact** and then click **Select the contact** to set the contact for the entry or click **Enter an email address** to enter the contact's email address.

Property	Description
Location	The location of the entry in the portal and its ID. Click **View the search path, ID and URL** to view the fully qualified location and the ID of the entry in the content store.
	Entries are assigned a unique identification (ID) number. For more information, see "Organizing Entries" (p. 29).
Created	The date the entry was created.
Modified	The most recent date that the entry was modified.
Icon	The icon for the entry. Click **Edit** to specify an alternative icon. For more information, see "Specify an Alternative Icon for an Entry" (p. 35)
Disable this entry	When selected, users that do not have write permissions for this entry cannot access it. The entry is no longer visible in the portal.
	If an entry is disabled and you have write access to it, the disabled icon appears next to the entry.
Language	A list of languages that are available for the entry name, screen tip, and description according to the configuration set up by your administrator.
	Click **Remove values for this language** to remove the entry name, screen tip, and description for a specified language.
Name	The name of the entry for the selected language.
Screen tip	An optional description of the entry. The screen tip appears when you pause your pointer over the icon for the entry in the portal. Up to 100 characters can be used for a screen tip.
Description	An optional description of the entry. It appears in the portal when you set your preferences to use the details view.
	Details view appears only in Public Folders and My Folders.
Run history	The number of occurrences or period of time to retain run histories for the entry.
Report output versions	The number of occurrences or period of time to keep report outputs.
	Setting this value to zero (0) saves an unlimited number of versions.

Property	Description
Package	The package that is associated with the entry. If the source package was moved or deleted, the text reads "Unavailable."
	Click **Link to a package** to link the entry to a different package. For more information, see "Select a Link for an Entry" (p. 33).
URL	A URL to either a file or Web site address. For more information, see "Create a URL" (p. 21).
	This field is visible only if you have read permissions for the entry. If you have write permissions without read permissions, this property is not visible.
Source report	A path to the source entry for a report view. If the source entry was moved or deleted, the text reads "Unavailable."
	Click **Report Properties** to view the properties of the source report. Click **Link to a report** to link the entry to a different package. For more information, see "Select a Link for an Entry" (p. 33).
Source agent	A path to the source entry for an agent view. If the source entry was moved or deleted, the text reads "Unavailable."
	Click **Agent Properties** to view the properties of the source report. Click **Link to an agent** to link the entry to a different package. For more information, see "Select a Link for an Entry" (p. 33).
Shortcut to	A path to the entry that the shortcut points to. If the referred entry no longer exists, the text reads "Source entry not found."
	Click **Source Properties** to view the properties of the source entry.
Advanced routing	A list of keywords used to direct requests by package, user group, or user role to dispatchers in identified server groups.
	Click **Set** to add routing keywords for packages, user roles, or user groups. The rules used to direct the requests are part of **Cognos Administration**.
Gateway	The location of the web server where the originating Cognos product resides. Applies only to Series 7 PowerPlay reports.

Permissions

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

Property	Description
Override the access permissions	Whether to replace the permissions that are inherited from the parent entry.
Access permissions (Name, Type, Permissions)	The permissions that are set for the entry. You can grant or deny read, write, execute, set policy, and traverse permissions. For more information, see "Access Permissions" (p. 43). Click **Add** to add more names to the list. Click **Delete** to delete names from the list.
Delete the access permissions of all child entries	Whether to remove the existing access permissions for all child entries so that they will use the access permissions for this entry.

Report, Query, Analysis, and PowerPlay Report Properties

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

- the **Report** tab for Report Studio reports

- the **Query** tab for Query Studio reports

- the **Analysis** tab for Analysis Studio reports

- the **PowerPlay Report** tab for Series 7 PowerPlay reports

Property	Description
Default action	The default action when the report is run.
Report options: Override the default values	Whether to override default run options for the report. When selected, the values that you can override appear.
Format	The default format, orientation, and paper size to use when the report runs. Appears only if **Override the default values** is selected.
Language	The default language to use for the report data when the report runs. Appears only if **Override the default values** is selected.
Prompt values	The values that are used to filter data when a report is run (p. 80).

Property	Description
Run as the owner	Whether to use the owner credentials (p. 47) when the report is run.
HTML options: Open in design mode	Whether to open an HTML-format Series 7 PowerPlay report in design mode.
Number of rows per Web page in HTML reports	The number of rows you want to appear per Web page in HTML reports
Enable selection-based interactivity in HTML reports	Whether to enable the following in HTML reports that are viewed in Cognos Viewer: drill up and drill down, drill through, Cognos Search, watch rules, and agent notification. For more information, see (p. 87) Note that to have watch rules evaluated in saved report output, you must select the **Enable enhanced user features in saved output versions** check box.
Enable alerts about new versions	Whether to allow report consumers to receive alerts about new versions of a saved report. If this check box is cleared, you are prompted whether to remove all users from the alert list.
Enable enhanced user features in saved output versions	Whether to create additional output formats so that watch rules can be evaluated and saved output versions can be imported into Cognos 8 Go! Office. Note that to enable watch rules, you must select the **Enable selection-based interactivity in HTML reports** check box.

Job Properties

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

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

Agent Properties

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

Property	Description
Tasks	A list of tasks in the agent.
Default action	The default action when the agent is run.
Prompt values	The values that are used to filter data when an agent is run (p. 97).
Run as the owner	Whether to use the owner credentials (p. 47) when the agent is run.
Alert list	Whether to allow users to add themselves to the alert list for an agent.

Page Properties

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

Property	Description
Number of columns	The number of columns used to organize the content of a page. Up to three columns can be used.
Content	Type of content added to a page. Use to add and remove portlets, distribute the portlets between the columns, change the order of columns and specify their width.
Language	The language in which the page title and instructions can be typed. It should match the product language.
Title	The page title. You can format the title by changing the font and character style, and the text alignment. To return to the default browser settings, click **Return to default**. To modify the default settings, click **Custom**. You can hide the title.

Property	Description
Instructions	Additional information about the page. You can format the text of instructions by changing the font and character style, and the text alignment. To return to the default browser settings, click **Return to default**. To modify the default settings, click **Custom**. You can hide the instructions.
Portlet style	The way a portlet appears on a page. To avoid cluttering the page, you can hide the portlet borders, title bars, and the edit button on the title bar.

Rule Properties

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

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

For information about creating watch rules, see .

The following table describes the rule properties that are available.

Property	Description
Disable the rule	Whether to disable the watch rule. When disabled, the watch rule is not applied when report output is generated.
Send an alert when the report *reportname* contains:	The name of the report and the rule defined for the watch rule. To edit the definition, click the existing filter condition, such as **>** (**greater than**) and in the list that appears, click a different condition. Specify a different value in the box.
For the selected context	The objects in the report to which the rule applies.
Alert type	The type of alert you receive when the rule is satisfied. You can be alerted by email or news item.

Organizing Entries

Organize entries such as reports, analyses, agents, and packages in a meaningful way so that you can easily find them. It is important to plan how you can best organize entries in the portal. Review

the entries and attempt to group them in a logical way. Consider grouping the entries by type or frequency of use.

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

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

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

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

Copy an Entry

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

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

If you want to run an existing agent or report with some minor changes, create an agent view (p. 99) or a report view (p. 74). For example, to change the format, language, or delivery method of a report, create a report view. You can copy multiple entries at the same time to the same location.

If you want a report to appear in more than one location, create a shortcut (p. 20).

You must have read permissions for an entry you are attempting to copy. You must also have traverse permissions for the current folder, and write and traverse permissions for the target folder (p. 43).

Steps

1. In Cognos Connection, select the check boxes next to the entry or entries you want to copy.

2. Click the copy button [icon] on the toolbar.

3. Go to the desired location for the new entry or entries and click the paste button [icon] on the toolbar.

4. If an entry name is the same as an entry name in the destination folder, choose whether you want to replace the existing entry with the one that you are copying:

   - To replace the existing entry, click **Yes**.

   - To cancel the copy, click **No**.

Move an Entry

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

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

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

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

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

If you want to use a generic entry as the underlying structure for additional entries, make a copy of the entry (p. 30). If you want an entry to appear in more than one location, create a shortcut (p. 20). If you want to run an existing agent or report with some minor changes, create an agent view (p. 99) or a report view (p. 74). For example, to change the format, language, or delivery method of a report, create a report view.

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

Steps

1. In Cognos Connection, select the check boxes next to the entry or entries you want to move.

2. Click the cut button ✂ on the toolbar.

3. Go to the desired location for the entry or entries and click the paste button 📋 on the toolbar.

4. If an entry name is the same as an entry name in the destination folder, choose whether you want to replace the existing entry with the one that you are copying:

   • To replace the existing entry, click **Yes**.

   • To cancel the copy, click **No**.

Rename an Entry

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

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

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

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

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

Steps

1. In Cognos Connection, locate the entry you want to rename, and in the **Actions** column, click the properties button .

2. Click the **Properties** tab.

3. In the **Name** box, type a new name for the entry.

4. Click **OK**.

Disable an Entry

You can disable entries to prevent users from accessing them.

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

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

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

You must have read and write permissions for an entry to enable or disable it. You must also have traverse permissions on the folder that contains the entry.

Steps

1. In Cognos Connection, locate the entry you want to disable and, in the **Actions** column, click the set properties button .

2. Click the **General** tab.

3. Select the **Disable this entry** check box.

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

4. Click **OK**.

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

Select a Link for an Entry

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

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

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

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

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

Steps

1. In Cognos Connection, locate the entry you want and click the set properties button .

2. Click the **General** tab and find the current link for the entry.

   For example, for a report, look in **Package**. For a report view, look in **Source report**.

3. Click the link.

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

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

Delete an Entry

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

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

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

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

Steps

1. In Cognos Connection, select the check boxes next to the entries you want to delete.

2. Click the delete button ✖ on the toolbar.

   A confirmation box appears.

3. Click **OK**.

Specify the Order of Entries

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

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

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

Steps

1. In Cognos Connection, click the tab you want.

2. Click the order button ▨ on the toolbar.

3. Select the entries in the **Shown in default order** list box and click the right-arrow button ➡ to move them to the **Shown first** list box.

   Note: You specify the order of folders and entries independently.

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

5. Click **OK**.

Create a Folder

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

You can create folders in the following locations:

• Public Folders

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

• My Folders

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

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

Tips

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

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

Steps

1. In Cognos Connection, go to the location for the new folder.

2. Click the new folder button 📁 on the portal toolbar.

3. In the **Name** box, type the name of the new folder.

4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view (p. 37). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

5. If you do not want to use the target folder shown under **Location**, choose another location:

   - Click **Select another folder,** select the target folder, and click **OK**. If the folder box is empty, go back one folder level using the path at the top of the dialog box.

   - Click **Select My Folders** as the location.

6. Click **Finish**.

The new folder has the same permissions as the parent folder. For information about changing access permissions, see "Access Permissions" (p. 43).

Specify an Alternative Icon for an Entry

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

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

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

Steps

1. In Cognos Connection, locate the entry you want and click the set properties button.

2. Click the **General** tab and next to **Icon**, click **Edit**.

3. Click **Specify an icon**, and in the edit box, specify a name for the image, for example, myicon. gif.

   The image must exist in the folder c8_location/webcontent/ps/portal/images.

4. Click **OK**.

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

Search for an Entry

You can search for entries whose name, description, or both match the string entered in the search criteria. You can find types of entries by leaving the search string empty and selecting a specific entry type in the advanced search criteria. The search ignores capitalization.

The following table shows examples of search criteria and results.

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

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

Steps

1. Go to the highest level folder you want to include in your search.

   Tip: You can increase or limit the folders to include in your search by changing the **Scope** when you enter the search criteria.

2. Click the search button on the toolbar.

3. In the search box, type the phrase you want to search for.

4. Click **Advanced**.

5. Choose the type of match between the search string and the results:

   - To return entries that include the search string somewhere in the name or description, click **Contains the exact string**.

   - To return entries whose name or description begins with the search string, click **Starts with the exact string**.

- To return entries whose name or description matches the search string word for word, click **Matches the exact string**.

6. In the **Type** box, click the type of entry to search for.

   Tip: To search for all shortcuts in the selected location, click **Shortcuts**.

7. In the **Modified** box, click the date that the entry was last modified.

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

   Note: If you are searching a third party namespace, this option is not available.

8. In the **Scope** box, click the folders you want to include in the search.

9. Click the **Search** 🔍 button.

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

   Tip: To open an entry, click its link.

Personalize the Portal

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

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

You can change the following settings:

General	Description
Number of entries in list view	The maximum number of rows that appear in a list before scrollbars are required. This applies to rows where scrolling is allowed.
Separators in list view	The method of separating entries in lists in Public Folders and My Folders.
	Choose from no separator, grid lines, or alternating backgrounds. This setting applies to all lists with the exception of the output versions list. This setting is available only if you use Internet Explorer or Firefox.
Style	The uniform look and feel applied to all components of Cognos 8.
	You can choose from the styles available to you.

General	Description
Default view	The decision to use list view or details view by default. List view shows the name, modified date, and actions. Details view shows the name, description, modified date, and possible actions. Details view works only in Public Folders and My Folders in Cognos Connection. In other components, list view is used.
Number of columns in details view	The maximum number of columns per row for the details view.
Report format	The preferred format to view the report. Choose between HTML, PDF, Delimited Text (CSV), Excel, and XML.
Automatic refresh rate in seconds	The period of time to wait before refreshing the portal interface. This setting applies only to some administrative pages.
Show a summary of the run options	The option to show a summary of the run options when a report is not run interactively.
Show the Welcome page at startup	The option to show or hide the Welcome page at the beginning of a session.
Product language	The language used by the Cognos 8 user interface. It applies to all Cognos 8 components, such as Cognos Connection, Cognos Viewer, and Report Studio.
Content language	The language used to view and produce content in Cognos 8, such as names and descriptions of entries, or data in reports.
Time zone	The time zone used. Select the default server time zone set by your administrator. For more information, see the *Installation and Configuration Guide*. Or you can select another time zone.

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

Personal	Description
Primary logon	The namespace and credentials that you used to log on to Cognos 8. Also shows the given name, surname, and email address if they have been defined.
Secondary logon	A list of secondary logons. The secondary logons exists if you logged on to multiple namespaces.
Alerts	Use to specify an email address for alerts. When the delivery service processes the alert list, it uses the email address specified in the **Email** box to send alerts to the user. If there is no email address specified, the email address specified in the **Primary logon** section is used.
Credentials	Authorization to other users, groups, and roles to run entries using the credentials. Click **Renew the credentials** after you change your password in your third-party namespace or to ensure that all credentials are in place if you are logged in to multiple namespaces.
Groups and roles	A list of groups and roles associated both with your primary and secondary logons.
Capabilities	A list of secured functions and features that you can use based on both your primary and secondary logons. To create trusted credentials, see "Trusted Credentials" (p. 47).

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

Portal Tabs	Description
List of entries	Represents the tabs, including Public Folders and My Folders, in your Cognos Connection environment.
Add	Use to add a tab for a specified page in Cognos Connection. Each tab represents Public Folders, My Folders, or a page.

Portal Tabs	Description
Remove	Use to remove a tab from Cognos Connection.
Modify the sequence	Use to change the order of tabs in Cognos Connection.

Steps

1. In Cognos Connection, click **My Area**, **My Preferences**, and click the required tab.

2. Choose the appropriate settings.

3. Click **OK**.

My Watch Items

Use the **My Watch Items** area of the portal to view (p. 40) and manage watch items from a single location. Watch items include alert lists and watch rules that help you monitor business events that are important to you.

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

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

- edit a watch rule (p. 41)

- enable or disable a watch rule. For information, see "Disable an Entry" (p. 32).

- organize watch rules in folders. For information, see "Create a Folder" (p. 34).

- delete a watch rule. For information, see "Delete an Entry" (p. 33).

- edit the My Watch Items page properties. For information, see "Edit a Page" (p. 52).

You can also add yourself to the alert list for a report (p. 84), add yourself to the alert list for an agent (p. 100), and create a watch rule for a report (p. 85).

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

View Watch Items

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

You can also remove yourself from an alert list (p. 41), and edit a watch rule (p. 41).

Steps

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

2. To view your alerts lists, click **Alerts**.

3. To view your watch rules, click **Rules**.

Remove Yourself from an Alert List

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

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

Tip: You can also add or remove yourself from an alert list for a report using the **Report** tab of the **Set Properties** page (p. 84). For an agent, you can use the **Agents** tab of the **Set Properties** page (p. 100).

Steps

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

2. Click the **Alerts** tab, and in the **Source** column, click the alert list to remove.

   You can select multiple alert lists.

3. Click the remove me from the alert list button.

4. Click the refresh button.

   Note that the alert list is removed from the **Source** column.

Edit a Watch Rule

After creating watch rules in saved HTML report output, you can edit them from the **My Watch Items** area of the portal. For example, you can change the general properties, such as name, language, and description. You can also change the properties, such as rule condition, context, and alert type.

For information about creating a watch rule, see "Create a Watch Rule for a Report" (p. 85).

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

Steps

1. In Cognos Connection, in the upper-right corner, click the my area button ⌸, and click **My Watch Items**.

2. Click the **Rules** tab, and in the **Actions** column, click the set properties button for the watch rule you want to edit.

3. Use the **Set properties** page, **General** tab, to change the properties, such as name, language, or description for the watch rule.

4. Use the **Set properties** page, **Rule** tab, to change the properties, such as rule, context, and alert type for the watch rule.

- To change a rule, in the **Rule** section, click the condition that appears, for example, **>** (**greater than**), click a new condition in the list, and specify a value for the condition in the box.

- To change the context, under **For the selected context**, select the check box next to the report items you want to include.

- To edit the alert type, under **Alert type**, select the alert type, if it is not already selected. Next to the alert type, click **Edit the options**.

Chapter 2: Access Permissions

In Cognos 8, you can secure your organization's data by setting access permissions for the entries. You specify which users and groups have access to a specific report or other content in Cognos 8. You also specify the actions they can perform on the content.

When you set access permissions, you can reference both authentication provider users, groups, and roles and Cognos groups and roles. However, if you plan to deploy your application in the future, we recommend that you use only the Cognos groups and roles to set up access to entries in Cognos 8 to simplify the process .

Permissions and Permitted Actions

You can grant or deny the following access permissions.

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

Permissions	Icons	Permitted Actions
Execute		Process an entry. • For entries such as reports, agents, and metrics, the user can run the entry. • For data sources, connections, and signons, the entries can be used to retrieve data from a data provider. The user cannot read the database information directly. The report server can access the database information on behalf of the user to process a request. Cognos 8 verifies whether users have execute permissions for an entry before they can use the entry. • For credentials, users can permit someone else to use their credentials. **Note:** Users must have execute permissions for the account they use with the run as the owner report option.
Set policy		Read and modify the security settings for an entry.
Traverse		View the contents of a container entry, such as a package or a folder, and view general properties of the container itself without full access to the content. **Note:** Users can view the general properties of the entries for which they have any type of access. The general properties include name, description, creation date, and so on, which are common to all entries.

Access Permissions for Users

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

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

Cognos 8 supports combined access permissions. When users who belong to more than one group log on, they have the combined permissions of all the groups to which they belong. This is important to remember, especially when you are denying access.

Tip: To ensure that a user or group can run reports from a package, but not open the package in a Cognos studio, grant the user or group execute and traverse permissions on the package.

Access Permissions Required for Actions

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

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

Ownership of Entries

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

Granted and Denied Access

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

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

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

Parent/Child Permissions

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

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

Accessing Entries Associated with Data Sources Secured Against Multiple Namespaces

Data sources in Cognos 8 can be secured against multiple namespaces. In some environments, the namespace used to secure the data source is not the primary namespace used for access to Cognos Connection. When you try to access an entry, such as a report, a query, or an analysis, that is associated with a data source secured against multiple namespaces, and you are not logged on to all of the required namespaces, a prompt for authentication appears. You must log on to the namespace before you can access the entry.

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

This functionality applies to Cognos Viewer only. If a similar situation occurs in a Cognos 8 studio, you must quit your task and log on to all the namespaces that you want to use in the current session.

Set Access Permissions for an Entry

Setting access permissions for an entry includes creating new permissions or updating existing permissions. You can specify access permissions for all entries in Cognos 8. Some examples of such entries are reports, queries, analyses, packages, agents, metrics, namespaces, groups, users, or dispatchers. You can reference entries from different namespaces.

To administer security, you must have set policy permissions.

Steps

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

2. In the **Actions** column, click the set properties button for the entry.

3. In the **Set properties** page, click the **Permissions** tab.

4. Choose whether to use the permissions of the parent entry or specify permissions specifically for the entry:
   - To use the permissions of the parent entry, clear the **Override the access permissions acquired from the parent entry** check box, then click OK if you are prompted to use the parent permissions. Click **OK**.
   - To set access permissions for the entry, select the **Override the access permissions acquired from the parent entry** check box, then proceed to step 5.

5. If you want to remove an entry from the list, select its check box and click **Remove**.

    Tip: If you want to select all entries, select the check box at the top of the list in the upper-left corner. Clear the check box to deselect all entries.

6. To specify the entries for which you want to grant or deny access, click **Add**, then choose how to select entries:

    *   To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.

    *   To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.

    *   To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

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

        Here is an example:

        Cognos/Authors;LDAP/scarter;

7. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

    Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

8. For each entry in the list, in the box next to the list, select or clear check boxes to specify what type of access you want to grant or deny.

9. Click **Apply**.

    In the **Permissions** column, an icon appears next to the user, group, or role. This icon represents the type of access granted or denied to the entry.

10. If you want to replace the existing permissions of the child entries with the permissions you set for this entry, in the **Option** section, select the **Delete the access permissions of all child entries** check box.

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

11. Click **OK**.

Trusted Credentials

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

Trusted credentials are also used to run scheduled requests when users are not logged on to Cognos 8, for example, overnight. When the request runs, a user session is created. The trusted credential is used to log on to Cognos 8 as the user the trusted credential represents and the user's access permissions are used to run the report or the job.

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

Create Trusted Credentials

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

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

Steps

1. In Cognos Connection, in the upper-right corner, click the my area button ![icon], **My Preferences**.

2. On the **Personal** tab, under **Credentials**, if you have not created credentials before, click **Create the Credentials**.

3. Select the users, groups, or roles you want to authorize to use your credentials.

   If you are prompted for your credentials, provide your user ID and password.

4. If you want to add entries, click **Add** then choose how to select entries:

   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.

   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.

   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

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

     Here is an example:

     Cognos/Authors;LDAP/scarter;

5. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

6. If you want to remove an entry from the list, select the check box next to it and click **Remove**.

7. Ensure that the list contains only the users, groups, or roles that you want, and click **OK**.

Chapter 3: Pages and Dashboards

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

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

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

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

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

Page Content	Portlet	Portlet Group
Browse Cognos folders, reports, and other entries	Cognos Navigator	Cognos Content
Search for Cognos reports and other entries	Cognos Search	
View and interact with Cognos reports and other entries	Cognos Viewer	
View and interact with different types of performance metrics, such as the metrics you want to monitor closely, or the metrics for which you are directly responsible.	Metric List	Metric Studio Portlets
Add a metric history chart that illustrates the historical performance of the metric	Metric History Chart	

Page Content	Portlet	Portlet Group
View and interact with custom applications created using Cognos 8 Software Development Kit	Cognos Extended Applications	Cognos Extended Applications Portlet
Register and show active links to other Web pages	Bookmarks Viewer	Cognos Utility
Add and view custom images, such as logos	Image Viewer	
Insert any other Web page	HTML Viewer	
Add and show the content of a Real Simple Syndication (RSS) news feed specified by a URL address	RSS Viewer	
Add and view custom text and images	HTML Source	
Create and view a dashboard with multiple tabs	Multi-page	Dashboard
Add non-Cognos items to a page	Supported third-party portlets	Third-party content

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

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

You can perform the following page-related tasks in Cognos Connection:

- create pages (p. 51)
- edit pages (p. 52)
- share pages with other users (p. 52)
- modify portlets (p. 53)
- enable communication between portlets (p. 53)
- add, remove, or reorder the portal tabs (p. 55)
- change your home page (p. 57)

For more information about dashboards, see "Create a Dashboard with Multiple Tabs" (p. 57).

Create a Page

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

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

After you create the page, you can edit it to modify its contents, layout and style, and to set access permissions (p. 52).

You can delete pages in Cognos Connection (p. 33) if you have the required access permissions for the pages. Deleting a page may affect your portal tabs (p. 55).

Steps

1. In Cognos Connection, click the new page button .

2. Specify a name and location for the page, and, if you want, a description and a screen tip.

3. Click **Next**.

   The **Set columns and layout** page appears.

4. Define the layout for your page by setting the number and width of columns.

   Tip: If you are using multiple columns and one of the columns includes a report that is shown in Cognos Viewer, set the width to at least 50% to minimize scrolling.

5. In the column to which you want to add portlets, click **Add**.

6. Click the portlet group that contains the portlets you want to add.

7. Select the portlets, and click the add button to move them to the **Selected entries** box. If you want to remove a portlet from the **Selected entries** box, click **Remove**.

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

8. Click **OK**.

9. Repeat steps 5 to 8 for each portlet group you want.

10. Click **OK**, and then click **Next**.

    The **Set page style** page appears.

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

      For more information, see "Edit a Page" (p. 52).

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

Tip: To change the formatting of the text, click **Custom**. To go back to the default formatting, click **Return to default**.

- If you want, hide the portlet borders, title bars, or the edit button in the title bar. This helps to avoid clutter and gives the page a uniform look and feel.

12. Click **Next**.

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

14. Click **Finish**.

Edit a Page

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

Page Titles and Instructions

When you create a page, you can specify a title and instructions for the page only in the product language you currently use. For example, if you use the French version of Cognos 8, you can type the title and instructions in French only. After the page is created, you can add the title and instructions for other language versions by editing the page properties on the **Page Style** tab.

Steps

1. Go to the page you want to edit.

2. Click the edit page button .

   Tip: Alternatively, locate the page in Cognos Connection, and click its set properties button.

3. Change the page properties as required.

   For more information about changing the page content, layout, and style, see "Create a Page" (p. 51).

   For more information about setting the page access permissions, see "Share a Page" (p. 52).

Share a Page

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

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

Steps

1. If you did not create the page in Public Folders, copy it there from your personal folders (p. 30).

2. Specify which users, groups, or roles can have read, traverse, execute, or write permissions for the page.

   For more information, see "Access Permissions" (p. 43)

Modify a Portlet

Portlets provide different types of information for pages. You can modify the content of an instance of a portlet in a page if you have the required permissions for the page(p. 52). You will retain the custom settings even if the administrator resets the portlet. If other users have access to the page that contains this portlet instance, they will also see the changes. However, if the administrator locks the portlet, you cannot configure it.

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

Steps

1. Go to the page that contains the portlet.

2. In the portlet title bar, click the edit button 🖆 .

3. Edit the properties as required.

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

4. Click **OK**.

Enable Communication Between Cognos Portlets

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

This functionality applies only to Cognos portlets and works only for portlets of the same group. In each group, one portlet is a target portlet, and the remaining portlets are source portlets. The results of actions in the source portlets are shown in the associated target portlets.

Portlet-to-portlet communication can be enabled between the source and target portlets in the following portlet groups.

Group	Source portlet	Target portlet
Cognos Content	Cognos Navigator	Cognos Viewer
	Cognos Search	Cognos Viewer
	Cognos Viewer	Cognos Viewer
Metric Studio Portlets	Metric List	Cognos Viewer
Cognos Utility	Bookmarks Viewer	HTML Viewer
	Image Viewer	HTML Viewer
	RSS Viewer	HTML Viewer

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

Steps

1. Choose the portlet group for which you want to enable portlet-to-portlet communication:

    * For the Cognos Content group, go to the page that contains the Viewer portlet, and click the edit button in the portlet title bar.

    * For the Cognos Utility group, go to the page that contains the HTML Source portlet, and click the edit button in the portlet title bar.

2. In the **Channel name** box, type the name you want.

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

3. Click **OK**.

4. Go to the page that contains the source portlet you want, and click the edit button in the portlet title bar.

    The source and target portlets can be in different pages.

    The portlet properties page appears.

5. Under **Open links**, in the **In a destination portlet** box, type the channel name specified for the associated target portlet in step 2.

6. Click **OK**.

Portal Tabs

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

The tabs represent:

- Public Folders
- My Folders
- Pages

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

When you delete a page, the tab associated with this page is automatically removed. Your tabs may also be affected by changes to the associated pages made by other users who have access to the pages. For example, when a page is deleted during the current session, its tab is no longer functional, and an error message may appear when you click the tab. To see the most current tab settings, click

the Cognos Connection refresh button ![refresh].

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

Add a Tab

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

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

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

Steps Using My Preferences

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

   A list of your current tabs appears.

2. Click **Add**.

3. In the list of available pages, select the page you want.

   You can select multiple pages.

4. Click the right arrow button ![arrow] to move the page to the **Selected entries** box.

5. Click **OK**.

   The tab for the page appears in the portal.

6. Click **OK** to close **My Preferences**.

Steps Using the Tab Menu

1. From the tab menu [icon] on the left side of the tab bar, click **Add tabs**.

2. In the list of available pages, select the page you want.

    You can select multiple pages.

3. Click the right arrow button to move the page to the **Selected entries** box.

4. Click **OK**.

    The tab for the page appears in the portal.

Steps Using the Add Button

1. In the list of available pages, locate the page you want.

2. In the **Actions** column, click its associated add button [icon].

    The tab appears in the portal.

Delete a Tab

You can delete a tab when it is not needed.

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

You can delete the Public Folders and My Folders tabs, and add them back later, if needed . Deleting the tabs does not delete Public Folders and My Folders from Content Manager.

Steps Using My Preferences

1. Click the may area button [icon], **My Preferences**, and then click the **Portal Tabs** tab.
    A list of your current tabs appears.

2. Select the check box next to the tab you want to remove, and click **Remove this tab**.
    You can select multiple tabs.

3. Click **OK**.
    The tab is deleted from the tab bar.

Steps Using the Tab Menu

1. On the tab bar, click the tab you want to remove.

2. From the tab menu [icon], on the left side of the tab bar, click **Remove this portal tab**.

3. In the message box, ensure you are deleting the proper tab, and click **OK**.

The tab is deleted from the tab bar.

Reorder the Tabs

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

Steps Using My Preferences

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

   A list of your current tabs appears.

2. Click **Modify the sequence**.

3. In the **Tabs** box, move the tabs up or down as required.

4. Click **OK**.

   The tabs appear in the new order.

5. Click **OK** to close **My Preferences**.

Steps Using the Tab Menu

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

   A list of your current tabs appears.

2. Move the tabs up or down using the appropriate buttons.

3. Click **OK**.

   The tabs appear in the new order.

Change Your Home Page

You can choose any page in Cognos 8 as your home page.

Steps

1. Go to the page you want to set up as your new home page.

2. Next to the home icon 🏠 , click the arrow, and click **Set View as Home**.

Create a Dashboard with Multiple Tabs

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

Different segments of information are displayed on different tabs. To create a dashboard, you assemble the different segments of information into a single view by using the Multi-page portlet

This portlet is linked to a source folder that contains entries that appear as tabs in the dashboard. You can make changes to the tabs in the dashboard by adding or deleting the associated entries from the source folder.

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

- folders and shortcuts to folders

  Use folders to include a second level of tabs.

- packages and shortcuts to packages

  Use packages to include a second level of tabs.

- reports and shortcuts to reports

  Use to view or run a Report Studio report.

- report views and shortcuts to report views

  Use to view or run a Report Studio report.

- queries and shortcuts to queries

  Use to view or run a Query Studio report.

- analysis and shortcuts to analysis

  Use to view or run an Analysis Studio report.

- pages and shortcuts to pages

  Use to add a page or another dashboard

- URLs and shortcuts to URLs

  Use to embed a different Web page.

- PowerPlay reports

  Use to view or run a PowerPlay report

- MS Documents

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

The general dashboard properties are the same as page properties. You can edit the dashboard layout and style , modify the properties of the Multi-page portlet , set up access permissions for the dashboard , and add it to the portal tabs .

Setting up the Dashboard Folder Structure

Before you start creating your dashboards, we recommend setting up a folder hierarchy in Public Folders to keep your dashboard resources organized. For example, create a folder for all the dashboards you plan to create. Next, create a subfolder for each dashboard to use as source folder for the entries that you want to include in the dashboard, such as reports, folders, pages, or shortcuts. The folder structure may look like this:
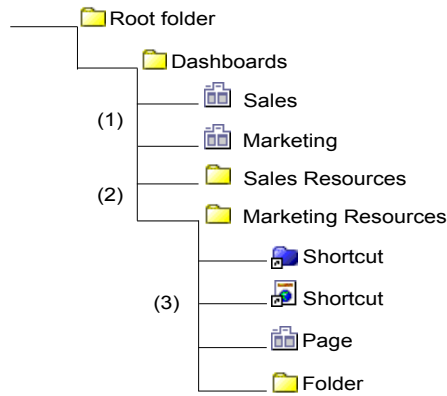
1. The Sales and Marketing pages are the multi-tabbed dashboards. These are the dashboard master pages that are built using the Multi-page portlet.

2. The Sales Resources folder is the source folder for the Sales dashboard, and the Marketing Resources folder is the source folder for the Marketing dashboard.

3. The source folders can contain entries such as reports, pages, folders, shortcuts, and so on. These entries appear as tabs in the dashboard.

Steps

1. In Cognos Connection, click the new page button ⊞.

2. Type the name, and select a location for your page.

3. Click **Next**.

4. In the **Set columns and layout** page, set the number of columns to 1, and the column width to 100%.

5. Click **Add**.

   A list of portlet groups appears.

6. In the **Available Entries** box, click **Dashboard**.

7. Select the **Multi-page** portlet, and click the right arrow button ➡ to move the portlet to the **Selected Entries** box.

8. Click **OK**, and then **Next**.

9. In the **Set page style** page, specify a meaningful title for the page, select any of the remaining properties, and click **Next**.

10. In the **Select an action** page, you can select **Add this page to the portal tabs**.

11. Click **Finish**.

    The page that you created is the dashboard master page.

12. Open the page you created.

An empty frame of the Multi-page portlet appears.

13. In the portlet toolbar, click the edit button .

    The portlet properties page appears.

14. In the **Source folder for pages** section, click the **Select an entry** link.

15. Browse to the folder or package that contains the resources for the dashboard, such as shortcuts, pages, or bookmarks. Select an entry, and click **OK**.

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

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

17. Click **OK**.

You can now open and view the dashboard page.

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

Adding Interactivity to Pages and Dashboards

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

You can enhance the page interactivity by

- defining global filters (p. 60)

- enabling the sharing of drill-up and drill-down actions (p. 64)

- enabling the sharing of drill-through actions (p. 65)

Defining Global Filters

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

Perform the following tasks to set up a page or a dashboard with global filters:

❏ Prepare the Reports (p. 61)

❏ Create the Global Filters

❏ Assemble the Reports on a Page

Preparing the Reports

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

If you include reports from only one package, the global filters share parameters using the model item. If you include reports from different packages, the following conditions must be met:

* All reports must use the same parameter name in their filter statements.

  An example of a relational filter is `Country = ?pCountryPrompt?`. An example of an OLAP slicer filter is `Great Outdoors Company].[Sales Territory].[SalesTerritory]. [Country]->?pCountryPrompt?`.

  We do not recommend using the default parameter name, such as `Parameter1`.

* The Report Studio reports must follow the naming convention used in one of the other studios.

  For example, in Query Studio the convention is `[attribute name]` or `[level name]`, such as `Order_Method1`. In Analysis Studio the convention is `[hierarchy name]`, such as `Order Method`.

  Note: If the page contains only Report Studio reports, we recommend using the `p[attribute name]Prompt` convention, for example, `pCountryPrompt`.

Create the Global Filters

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

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

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

Steps

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

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

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

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

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

The prompt can now be added to a portal page or a dashboard .

Assemble the Reports on a Page

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

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

You can use different design strategies to implement global filters in a page. Here is an example of a basic layout:
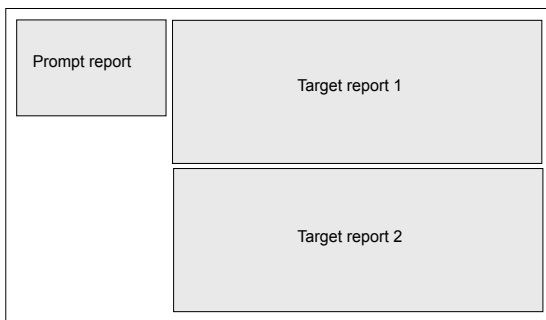
If your page includes reports from different packages, ensure that the prompt reports use the same parameter names as the target reports.

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

Steps

1. In Cognos Connection, click the new page button .

2. Type the name, and select a location for your page.

3. Click **Next**.

4. In the **Set columns and layout** page, set the number and width of columns.

   For example, the reports that display the prompts and prompt controls can be placed in one column, and the target reports in a separate column to the right.

5. Click **Add** at the bottom of the first column.

6. In the **Available Entries** box, click **Cognos Content**.

7. Select the **Cognos Viewer** portlet, click the right arrow button ⮕ to move the portlet to the **Selected Entries** box, and click **OK**.

8. Repeat steps 5 to 7 for each column.

   You must add the Cognos Viewer portlet for each report that you want to include in the column. For example, if the column on the left will contain a prompt and prompt controls, add two Cognos Viewer portlets.

9. Click **Next**.

10. Complete the remaining steps in the wizard, if needed, and click **Finish**.

    For more information, see the steps in the section .

11. Go to the folder where you saved the new page, and open it.

    In the page columns, you can see the empty frames of the Cognos Viewer portlets.

12. For any portlet in the page, click the edit button 🖻 in the portlet toolbar.

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

14. Click **Edit Properties**.

    The **Advanced Properties Editor** appears.

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

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

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

16. For the **Prompt the user** property, specify how to execute the prompts.

17. For the **Prompt values** property, select the **Communicate with other portlets** check box.

    This property enables communication between this portlet and other portlets in the page that have this property set up.

    - When you select **Every time**, if the report contains optional or required prompts, the user is prompted to enter the prompt values before the report is run.

    - When you select **Only when required parameter values are missing**, the user is prompted if the report contains required prompts and the values are missing. Otherwise the report runs successfully.

    - When you select **Never and show the report only when required values are provided**, Cognos Viewer attempts to run the report, but the page remains hidden until the required prompt values are provided.

- When you select **Based on the prompt settings of the report**, Cognos Viewer uses the prompts specified in the report.

18. If you want to set up communication between only specific portlets in the page, type the channel name in the box provided.

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

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

19. If you want to see the portlet toolbar in the page, for the **Show Toolbar** property, select the **Normal mode** and **Maximized mode** check boxes.

20. Click **OK** to close **Advanced Properties Editor**, and click **OK** again to close the general properties page.

21. Repeat steps 12 to 20 for each portlet in the page.

Enable Sharing of Drill-up and Drill-down Actions

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

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

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

Steps

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

   For more detailed information, see the steps in

2. Configure the Cognos Viewer portlets to display the reports that you want to add to the page.

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

3. In the **Advanced Properties Editor** of the Cognos Viewer portlets, for the **Drill down and drill up** property, select the **Communicate with other portlets on the page** check box.

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

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

4. If you want to set up communication between only specific portlets in the page, type the channel name in the box provided.

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

Enable Sharing of Drill-through Actions

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

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

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

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

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

Steps

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

   For more detailed information, see the steps in the section "Create a Page" (p. 51).

2. Configure one of the Cognos Viewer portlets to display the Report Studio source report that contains the drill-through path.

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

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

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

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

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

   The channel name is mandatory.

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

Chapter 4: Reports and Cubes

You can use reports, cubes, and documents to analyze data and help you make informed and timely decisions. In Cognos 8, reports and cubes can be published to the portal to ensure that everyone in your organization has accurate and relevant information when they need it.

Query Studio and Report Studio Reports

Typically, for Query Studio and Report Studio reports, your data modeler creates models (p. 23) from subsets of corporate data. These models are then published as packages in Cognos 8. Query Studio and Report Studio users can create reports based on the packages and publish them in Cognos 8. In Cognos Connection, a Query Studio report is called a query and a Report Studio report is called a report.

OLAP sources do not need additional modeling.

Analysis Studio Reports and Cubes

An Analysis Studio administrator can publish Analysis Studio reports and cubes in Cognos 8. Analysis Studio users can create reports and publish them in Cognos 8. In Cognos Connection, an Analysis Studio report is called an analysis.

Working with Reports and Cubes

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

After a report is published to the portal, you can view, run, or open it (p. 68) or view report output versions (p. 82). You can also view the report in various formats (p. 76).

You can distribute reports by saving them, sending them by email, printing them, or bursting them (p. 88). You can also set run options for the current run (p. 69), and set advanced run options for the current run (p. 70).

You can create an ad hoc report using Query Studio or you can use Report Studio to define layouts, styles, and prompts for your report (p. 73). You can also create Analysis Studio reports (analyses) .

You can schedule a report to run at a later time or on a recurring basis. You can schedule a report as part of a job or based on a trigger. You can view the run history for a report. For more information, see "View the Run History for Entries" (p. 120). You can also include a report in an agent (p. 97).

You can add yourself to the alert list for a report so that you are alerted when new versions of the report are created (p. 84). You can also specify watch rules in saved HTML report output so that you are alerted whenever the events specified by the watch rules are satisfied (p. 84).

You can disable selection-based features (p. 87), such as drilling up and down and drill-through.

You organize your report entries in a way that is convenient for you. For more information, see "Cognos Connection" (p. 19).

Mixed Currencies

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

Accessibility for the Disabled

Cognos is committed to assisting people with disabilities, and promotes initiatives that make workplaces and technologies accessible. Cognos 8 provides an accessible report reading solution. This solution allows disabled users and users of Assistive Technology the ability to access and display reports in Cognos Viewer.

Series 7 Reports and Cubes

For information on working with Series 7 reports and cubes in Cognos 8, see "Series 7 Reports in Cognos Connection" (p. 93).

View, Run, or Open a Report

You can view the most recent run of a report, run a report, or open a report in the authoring tool. The default action is to view the most recent run of a report but you can select the default action that you prefer (p. 68).

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

Step

*   In Cognos Connection, click the report that you want.

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

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

Set Default Report Options

You can set one of the following actions as the default when a report is run (p. 68):

*   view the most recent report or run if it has not been previously run (default)

*   run the report

*   open the report in the authoring tool that was used to create it (Query Studio, Report Studio, or Analysis Studio)

You can set default report options such as format and language. You can also set the default to prompt for values (p. 80) and run as the owner. For information about properties, see "Entry Properties" (p. 23).

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

Steps

1. In Cognos Connection, click the set properties button [icon] on the actions toolbar to the right of the report.

2. Click the **Report** tab for a Report Studio report, the **Query** tab for a Query Studio report, or the **Analysis** tab for a Analysis Studio report.

3. Under **Default action,** select the default action for when the report is run.

4. If you want to override report options, under **Report options,** click the **Override the default values** check box.

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

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

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

6. If you want to run the report using the owner credentials, click the check box next to the owner listed under **Run as the owner.**

7. To set additional report options, click **Advanced options.**

    *   Under **Number of rows per Web page in HTML reports,** click the number of rows you want to allow.

    *   To allow such features as drill up and drill down, drill through, Cognos Search, watch rules, and agent notification when the report is viewed in Cognos Viewer, select **Enable selection-based interactivity in HTML reports.**

    *   If you want to allow the creation of additional output formats so that watch rules can be evaluated and saved output versions can be imported into Cognos 8 Go! Office, select **Enable enhanced user features in saved output versions.**

    *   If you want users to receive alerts when new report output is generated, select **Enable alerts about new versions.**

8. Click **OK.**

Set Report Options for the Current Run

You can set the following options for the current run of a report:

- report output format

- language

- delivery method

- prompt for values

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

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

You can change default run options for reports

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

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

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

Steps

1. In Cognos Connection, click the run with options button ▶ on the actions toolbar to the right of the report you want to run.

2. Under **Format**, click the format that you want for the report output.

3. Under **Language**, click the language that you want for the report output.

4. Under **Delivery**, choose to view the report now, save the report, or print the report.

5. If you choose to print, click **Select a printer**, click the button next to the printer you want to use, and click **OK**. If the printer is not listed, you can type the printer information.

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

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

7. Click **Run**.

Set Advanced Report Options for the Current Run

You can specify the following advanced run options for a report for the current run:

- time when the report should run

- multiple report output formats if you choose to run the report later and additional format choices for HTML and PDF (p. 76)

- one or more languages (p. 78)

- one or more delivery methods (p. 88)

- prompt for values (p. 80)

- burst the report (p. 88)

The report runs in the background if you run the report later, select multiple report formats or languages, select to save, print or email the report, or burst the report. If you set your preferences to show a summary of the run options (p. 37), the summary appears whenever the report is not run interactively.

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

Tip: Click the output versions button to view the selected formats. For more information, see "View Report Output Versions" (p. 82).

Default options are set by the report author. You can change default run options for reports "Set Default Report Options" (p. 68).

If you choose to save, print, or send the report by email, you can choose multiple formats. If you choose to run the report later, the delivery option is automatically changed to save. For more information on saving report output, see "Save Report Output" (p. 81).

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

Steps

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

2. Click **Advanced options**.

3. Under **Time and mode**, click **Run in the background**, and then click **Now** or **Later**. If you specify **Later**, set a date and time for the report to run.

4. Under **Format**, click the formats you want for the report output.

   - The Enable selection-based interactivity check box is selected by default. For information about deselecting this option, see "Disable Selection-based Interactivity" (p. 87).

5. If you want to select a different or additional languages for the report, under **Languages**, click **Select the languages** and use the arrow keys to move the available languages to the **Selected languages** box and click **OK**.

   Tip: To select multiple languages, use the Ctrl key or use the Shift key.

6. Under **Delivery**, choose the delivery method that you want:

   - If you schedule a report for a future time, select multiple formats or languages, or burst the report. You cannot view the report now. Select one of the other delivery methods.

   - If you choose to print, click **Select a printer**. Click the button next to the printer you want to use and click **OK**. Or, if the printer is not listed, you can type the printer information.

   - If you choose to save using report view, you can change the name or destination folder of the report view. Click **Edit the save as options**, make the changes and click **OK**.

   - If you choose to email the report, proceed to step 7.

7. If you select **Send the report by email**, click **Edit the email options** and set the following options:

   - To display the blind copy field, click **Show Bcc**.

   - To choose Cognos 8 recipients, click **Select the recipients**. Select the check box next to the names you want to include, and click **To, Cc** (copy), or **Bcc** (blind copy). The entries that you select are listed under **Selected entries**.

     Tip: To select all entries in a list, click the check box in the upper-left corner of the list. To remove names from **Selected entries**, select the check box next to the name and click **Remove**. To search, click **Search**. In the **Search string** box, type the phrase you want to search for. For advanced search features, click **Edit**. For more information, see "Search for an Entry" (p. 36).

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

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

     Tip: If you logged on, your name automatically appears in the **To** list box.

   - Under **Subject,** type the subject of the email.

   - Under **Body,** type a message to be included in the email.

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

   - To include a hyperlink to the report, select the **Include a link to the report** check box. To include the report as an attachment, select the **Attach the report** check box.

   - Click **OK**.

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

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

Note: You are prompted for values only if the report specification or model includes prompts or if you have access to multiple data source connections or signons, even if the Prompt for values check box is selected.

9. Under **Bursting**, specify whether the report should be bursted.

   This option is available only if the report author defined burst keys in the report.

10. Click **Run**.

Create a Report

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

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

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

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

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

* Query Studio *User Guide*

* Report Studio Professional Authoring *User Guide*

* Cognos Analysis Studio *User Guide*

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

Tip: A package is identified by the package icon.

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

Steps

1. Choose whether you want to create a simple or complex report:

   * To create a simple report, in the upper right corner, click the **Query Studio** link.

   * To create a complex report, in the upper right corner, click the **Report Studio** link.

   * To create an Analysis Studio report, in the upper right corner, click the **Analysis Studio** link.

2. If the **Select Package** dialog box appears, do one of the following to select the package containing the data you want to use in your report:

- In the **Recently used packages** list, click the package.

- In the **List of all packages** list, navigate to the package and click it.

Creating a Query Studio Report Without Using Actual Data

You can create a report without accessing the data that will eventually be used in the report. Query Studio's preview mode lets you create or modify reports without retrieving actual data from the database. Instead, simulated data is shown.

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

Create a Report View

You can create a report view, which uses the same report specification as the source report, but has different properties such as prompt values (p. 80), schedules, delivery methods, run options, languages (p. 78), and output formats (p. 76).

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

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

If you want to use a generic report as the underlying structure for additional reports, make a copy of the report(p. 30). If you want a report to appear in more than one location, create a shortcut (p. 20).

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

Steps

1. In Cognos Connection, locate the report you want to use to create the report view.

2. Under **Actions,** click the report view button ![report view button] next to the report.

3. In the **Name** box, type the name of the entry.

4. If you want, in the **Description** and in the **Screen tip** box, type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view (p. 37). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

5. If you do not want to use the target folder shown under **Location,** click **Select another location** and select the target folder and click **OK**.

6. Click **Finish**.

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

The report view has the same run options and properties as the original entry. To change the default properties of a report view, see "Set Default Report Options" (p. 68). For information about properties, see "Entry Properties" (p. 23).

Edit a Report

You can use the Cognos 8 authoring tools to edit an existing report. You may want to change the report layout, style, or font. The report may need to be updated because of changes to the data or to add language support.

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

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

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

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

Report properties, such as the preferred output format, language, prompt values, or report retention, can be specified by changing the run options in the portal (p. 68). For information about properties, see "Entry Properties" (p. 23).

If you want to use a generic report as the underlying structure for additional reports, make a copy of the report (p. 30). If you want a report to appear in more than one location, create a shortcut (p. 20). If you want to keep the underlying report specifications but want the choice of another report format, language, delivery method, or run option, create a report view (p. 74).

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

Step to Edit a Report in Cognos Connection

• In Cognos Connection, click the open button on the **Actions** menu for the report you want to edit.

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

Step to Edit a Query Studio Report in Report Studio

* Click the **More** link on the actions toolbar and click **Edit with Report Studio**

Report Formats

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

You can choose from the following formats:

* HTML

* HTML fragment

* XHTML

* XML

* PDF

* Excel 2000

* Excel 2000 single sheet

* Excel 2002

* Excel 2007

* delimited text (CSV) format.

You can specify the default format to be used when a report is run (p. 68). All shortcuts to a report acquire the default format from the source entry.

You can specify the report format in the run options page (p. 69), in the report properties (p. 23), or in your preferences (p. 37). When you run a report without specifying run options, the format specified in the report properties is used. When it is not specified in the report properties, the format specified in your preferences is used.

XHTML and some PDF formats are only available when you set advanced run options (p. 70). You can also select multiple formats when you set advanced run options.

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

HTML Formats

You can select from the following HTML formats:

* HTML for standard HTML formatting

* HTML fragment if you must imbed the HTML in an existing Web page

- XHTML for HTML that is passed through a parser

To select HTML fragment and XMTML or the number of rows per web page, see "Set Advanced Report Options for the Current Run" (p. 70).

XML Format

XML report outputs save the report data in a format that conforms to an internal schema, xmldata. xsd. You can find this schema file in *c8_location*/bin.

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

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

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

PDF Format

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

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

Excel Formats

The Excel 2000 format can be viewed with versions of Excel 2000 and later. It supports up to 65,536 rows and multiple sheets. The Excel 2000 format is only available in Cognos 8 when Cognos Application Firewall validation is disabled.

Excel 2000 single sheet format offers improved security. Excel 2000 may have cookies in the URLs to spreadsheets, which could be used to illegally impersonate a user. Excel 2000 single sheet format does not use outgoing URLs. However, there is a limit of 65,536 rows, and page breaks for multiple-author pages are ignored.

Excel 2002 format and Excel 2000 single sheet format also offer the following benefits:

- Both work with SSL protocol.

- Both work with a single signon.

  Secure reports can be accessed without subsequent signons because the system automatically identifies users and provides security information.

- Both work with Netscape 7.01.

- Spreadsheets are contained in a single file for reliable spreadsheet navigation.

The Cognos 8 full date format does not always appear correctly in Microsoft Excel 2000 if it is on a system with a regional setting other than English. This does not occur with Microsoft Excel 2002 or 2003 versions. To fix this, reapply the proper format in Excel.

Excel 2007 format renders report output in native Excel XML format, also known as XLSX, that provides a fast way to deliver native Excel spreadsheets to Microsoft Excel XP, Microsoft Excel 2003, and Microsoft Excel 2007. Users of Microsoft Excel XP and Microsoft Excel 2003 must install the Microsoft Office Compatibility Pack, which provides file open and save capabilities for the new format. 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.

CSV Format

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

Reports saved in CSV format

- are designed to support Unicode data across many client operating systems

- are UTF-16 Little Endian data-encoded

- include a BOM (Byte Order Mark) at the beginning of the file

- are tab-delimited

- do not enclose strings in quotation marks

- use a new line character to delimit rows

- show only the results of a report query. Page layout items, such as titles, images, and paramDisplay values do not appear in the CSV output.

Report Languages

You can choose the languages for a report. You can specify the report language on the run options page (p. 69), in the report properties (p. 23), or in your preferences (p. 37). When you run a report, the language specified in the report properties is used. When it is not specified in the report properties, the language in your preferences is used.

You can run a report using the default language (p. 68), select a different language for a single run of the report (p. 69), or select more than one language for a report (p. 70).

You can add multilingual properties for each of the entries in the portal (p. 79). You can specify the default language to be used when a report is run (p. 68).

Selecting a language for your report does not change the language used in the portal. You can change the language used in the portal interface by personalizing the portal (p. 37). All shortcuts to a report acquire the default language from the source entry.

To specify the report language, you must have read and write permissions for the report and traverse permissions for the folder that contains the report (p. 43).

The package used to create the report must contain multilingual data before the report outputs are shown in the selected languages (p. 23).

Report Languages When Using an SAP BW Data Source

When a report runs, the report server connects to the underlying data source to obtain data. When using an SAP BW data source, if the SAP BW server does not support the language associated with your content locale, Cognos 8 checks a locale map for a corresponding locale. If the SAP BW server supports the language for the corresponding locale, this language is used. Otherwise, the report runs using the default language installed on the SAP BW server.

Add Multilingual Properties

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

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

For information about changing the language to be used by the portal, see "Personalize the Portal" (p. 37).

Steps

1. In Cognos Connection, click the set properties button next to the entry you want to change.

2. Click the **General** tab.

3. Under **Language**, select a language from the list.

   Languages that already have multilingual properties defined appear at the top of the list above a separator line.

4. If you want, type a description in the **Name**, **Description**, and **Screen tip** box.

   The name appears in the list of portal entries. The description appears when you set your preferences to use the details view (p. 37). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

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

5. Click **OK**.

Specify the Default Language for a Report

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

Steps

1. In Cognos Connection, click the set properties button next to the report you want to change.

2. On the **Report options** tab, under **Language**, select the default language from the list box and click **OK**.

Specify the Default Prompt Values for a Report

You can use prompt values to specify the range of data included in a report when it is run. For example, you can specify a date range that is a subset of the dates available in the report.

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

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

If you have write access to a report and change the prompt values, those values are saved for everyone running the report after you. If you consistently use prompt values that differ from the majority of users, create a report view of the report (p. 74) in your personal folders.

By default, you are prompted for values each time the report runs. You can change this in the report properties (p. 23) or when you set run options for a report (p. 69).

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

Steps

1. In Cognos Connection, click the set properties button next to the report you want to change.

2. On the **Report** tab for Report Studio reports, the **Query** tab for Query Studio reports, or the **Analysis** tab for Analysis Studio reports, under **Prompt values**, click either **Set** or **Edit**.

   If the report does not have saved prompt values, the run options show **No values saved** and clicking **Set** results in a message indicating that the report does not contain prompts.

3. Select the default value for the prompts and click **OK**.

4. If you want to be prompted each time the report is run, select the **Prompt for values** check box.

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

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

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

5. Click **OK**.

Save Report Output

All report output is stored automatically in Cognos 8. You may also be able to save copies of reports in other file locations:

*   in Cognos 8 so that it can be used again and for archive purposes

*   outside of Cognos 8 for use in external applications such as web sites and for use by people who don't have access to Cognos 8

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

You can also choose how to save a report when you schedule it .

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

Steps

1. In Cognos Connection, click the run with options button ▶ on the actions toolbar to the right of the report you want to run.

2. Click **Advanced options**.

3. Under **Time and mode**, click **Run in the background**, and then click **Now** or **Later**.

4. Under **Delivery**, choose where you want to save your report:

    *   To save a copy in Cognos 8, click **Save**. Then, click **Save the report** or **Save the report as report view**. If you choose to save as report view, you can a change the name or destination folder of the report view. Click **Edit the options**, make the changes and click **OK**.

    *   To save a copy outside Cognos 8, click **Save to the file system**. To change the report name, click **Edit the options**. You can also change how file conflict is resolved. Click **Keep existing files** to not overwrite existing files, **Replace existing files** to simply overwrite existing files. Click **Make the file names unique and append a timestamp** or **Make the file names unique and append a sequence number** to avoid overwriting existing files by making new files with unique timestamps or sequence numbers and click **OK**.

5. If more than one file location is defined, select the location where you want to save from the **Location** list.

6. Click **Run**.

View Report Output Versions

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

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

- runs later

- has multiple formats or languages

- has a delivery method of save, print, or email

- is a burst report

Report output versions are listed by report format (p. 76). By default, the list contains report output versions for the language that is defined in your content locale. If no reports versions are found for that language, report formats for all languages are shown.

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

You can specify how long you want to keep report output (p. 83).

Steps

1. In Cognos Connection, click the view report output versions button ▣ next to a report that has multiple output versions.

2. Choose the output version that you want to view:

   - To show report formats in a specific language or all languages, click **Languages** and select from the list.

   - To show a different output version, select the version from the **Versions** list.

   - To show the current version, click the report format.

   Tip: To delete a version that you have write access to, click **Manage versions**, select the versions that you want to delete, click **Delete** and then click the close button to return to the review report output versions page.

3. If you want to download a report output version, click the download icon in the **Actions** column.

Specify How Long to Keep Report Output

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

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

Steps

1. Click the set properties button [icon] next to the entry you want.

2. On the **General** tab, under **Run history**, choose the retention method and type the value:

   - To keep report output for a specific number of occurrences, click **Number of occurrences** and type the number. To save an unlimited number of report outputs, set this value to 0.

   - To keep report output for a specific length of time, click **Duration** and click either **Days** or **Months**. Type the appropriate value in the box.

3. Click **OK**.

Enable an Alert List for a Report

Granting permission for an alert list lets the report user decide whether to be alerted when new versions of the report output become available. Whenever the report is run and report output is saved, the report user is alerted by email as a Bcc recipient. The email contains a link to the latest report output.

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

The alert list is independent of any distribution lists associated with the report .

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

Steps

1. In Cognos Connection, click the set properties button next to the report for which you want to enable an alert list.

2. On the **Report** tab for Report Studio reports, the **Query** tab for Query Studio reports, or the **Analysis** tab for Analysis Studio reports, click **Advanced options**, and then click the **Enable alerts about new versions** check box.

3. Click **OK**.

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

Add Yourself to or Remove Yourself from an Alert List for a Report

By adding yourself to the alert list for a report, you receive an email notification when new versions of the report output are saved. In this way, you can monitor changes in the output of reports that are of interest to you.

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

Being on the alert list is independent of any distribution lists associated with the report

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

You can add yourself to only one alert list per report.

Before you can add yourself to an alert list for a report, the report owner must enable the alert list. To receive alerts, you must have an email address defined in your LDAP security profile or in the **My Preferences**, **Personal** tab.

Steps in Cognos Connection

1. In the portal, locate the report.

2. In the **Actions** column, click **More**.

3. In the **Perform an action** page, click **Alert me about new versions** or **Do not alert me about new versions**.

4. Click **OK**.

In the **My Watch Items** area of the portal, note the change in the watch list.

Steps in Cognos Viewer

1. Open the saved report output.

2. On the toolbar, under **Watch New Versions**, click **Alert Me About New Versions** or **Do Not Alert Me About New Versions**.

Steps to Remove Yourself from Multiple Alert Lists

1. In Cognos Connection, click **My area, My Watch Items**.

2. On the **Alerts** tab, select the alerts to delete from the alert list.

3. Click **Remove me from the alert list**.

Watch Rules in Saved Reports

Watch rules are defined in Cognos Viewer by report users so that they can monitor events of interest to them in saved reports. Creating watch rules does not require access to Event Studio.

Tip: Users can view and edit watch rules in a single location from the **My Watch Items** area in Cognos Connection.

Watch rules are based on event conditions that are evaluated when the report is saved, not when the report runs interactively. When the event condition is satisfied, the report user is alerted by email or news item.

The event conditions are created using a numeric measure and can be specified only in saved HTML reports. You can define an unlimited number of conditions for a report. The locale for the conditional report output is the same as the locale for the report that contains the event condition.

Before a user can create watch rules and receive alerts, the report owner must enable watch rules for the report (p. 85).

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

Enable Watch Rules for a Report

Enabling watch rules lets the report user specify conditions in saved HTML report output and receive alerts based on these conditions. Whenever the report is run and report output is saved and the conditions are satisfied, the report user is alerted by email or news item.

For information about creating a watch rule, see "Create a Watch Rule for a Report" (p. 85).

To allow watch rules for a report, you must have write permission for the report.

Steps

1. In Cognos Connection, click the set properties button next to the report.

2. On the **Report** tab for Report Studio reports, the **Query** tab for Query Studio reports, or the **Analysis** tab for Analysis Studio reports, under **Advanced options**, select the **Enable selection-based interactivity in HTML reports** and **Enable enhanced user features in saved output versions** check boxes.

    Selecting these options specifies that additional context information is saved with the report output.

3. Click **OK**.

After selecting the advanced options, you must run the report and save the report output in HTML format before users can create watch rules.

Create a Watch Rule for a Report

Use watch rules to monitor user-defined events in saved HTML reports. When the report is saved and the watch rule is satisfied, you are alerted by email or news item.

You can view or edit the watch rules you create for reports by using the **My Watch Items** area of the portal. For more information, see "My Watch Items" (p. 40).

Watch rules can be created only in saved HTML reports. For example, you cannot create watch rules in PDF report output.

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

Steps

1. In the Cognos Connection portal, go to the saved HTML report and open it in Cognos Viewer.

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, in the conditional expression that appears, click the down arrow, click the expression you want for the watch rule, for example, `>= (greater than or equal)`, and specify a value in the box.

4. Under **For the selected context**, click the report items to which the rule applies.

5. Click **Next**.

6. In the **Specify the alert type** page, specify how you want to be alerted when the rule is satisfied:
   - To be alerted by email, select the **Send the report by email** check box. If you want to change the email options, click **Edit the options**.
   - To be alerted by news item, select the **Publish a news item** check box. If you want to change the news item options, click **Edit the options**.

7. Click **Next**.

8. In the **Specify a name and description - Alert Using New Watch Rule** page, specify a name, description, and location for the watch rule.

   You can organize watch rules in folders on the **Rules** tab of the **My Watch Items** area of the portal.

9. Click **Finish**.

Modify or Delete a Watch Rule in Cognos Viewer

Watch rules you create in saved HTML reports can be edited and deleted in Cognos Viewer.

For information about creating a watch rule, see "Create a Watch Rule for a Report" (p. 85).

You can also delete and edit watch rules from the **My Watch Items** area of the portal. For more information, see "My Watch Items" (p. 40).

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

Steps

1. Open the saved report output in Cognos Viewer.

2. On the 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. Proceed to step 3.

- 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.

Note that the changes you make to a watch rule in Cognos Viewer are made also in the **My Watch Items** area of the portal.

Disable Selection-based Interactivity

You can disable selection-based interactivity for an HTML report that is viewed in Cognos Viewer to shorten the time that it takes the report to run. After you disable this functionality, you cannot:

- drill up and down in a report

- drill through to other reports

- use Cognos Search

- use conditional report delivery

- use agent notification

If selection-based interactivity is enabled in Cognos Connection, a user can perform drill up and down and drill-through actions in Report Viewer or Query Studio. If selection-based interactivity is disabled in Cognos Connection, the ability to perform drill up and down and drill-through are disabled regardless of how the drill through definitions and settings are authored in Report Studio and Cognos Connection.

Selection-based interactivity is enabled by default.

Tip: You can instead enable or disable selection-based interactivity for the current run only.

Click **Run with options** next to the report and then click **Advanced options**. Click **Enable selection-based interactivity in HTML reports**.

Steps

1. In Cognos Connection, click the set properties button on the actions toolbar to the right of the report.

2. Click the **Report** tab for a Report Studio report, the **Query** tab for a Query Studio report, or the **Analysis** tab for an Analysis Studio report.

   Tip: Disabling selection-based interactivity on an Analysis Studio report has no effect.

3. Click **Advanced options**.

4. Clear the **Enable selection-based interactivity in HTML reports** check box.

Note that disabling selection-based interactivity on an Analysis Studio report has not effect.

Distributing Reports

You can distribute reports to other users to share information with them. In Cognos 8, you can distribute reports by

- saving them (p. 88) where other Cognos 8 users can access the reports at their convenience

- sending them to users by email (p. 88)

- printing them (p. 89)

- bursting them (p. 89)

You can schedule the distribution of your reports so that recipients receive the reports regularly (p. 107).

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

When you attach a report to an email, the report is no longer secured by the Cognos security system.

When sending a report by email, note that if you choose the recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails. However, if you type the email address manually, read access is not required.

To distribute reports to more than one recipient, you can create distribution lists (p. 89), which contain references to users, groups, and roles. If a recipient is not part of the Cognos security system, you can create a contact (p. 89) for that person and add it to a distribution list.

Saving a Report

You can share a report with others by saving the report in a location that is accessible to other users, such as in the public folders. Public folders typically contain reports that are of interest to many users.

You can save a report when you set options for the current run (p. 69) or you can use advanced report options (p. 70) to save a report in Report View (p. 74).

To share a report that is currently located in your personal folders, copy the report (p. 30), move the report (p. 31), or create a shortcut to the report (p. 20) and save it in the public folders.

For information about saving reports, see Query Studio *User Guide,* the Report Studio *User Guide*, or the Analysis Studio *User Guide*.

Sending a Report by Email

You can share a report with others by sending the report by email. This is especially useful if you want to share the report with a group of people who do not have access to the portal.

You can attach reports to email (p. 70). You can also include a URL to the report in an email. Entries that are sent as attachments to emails are no longer secured by the Cognos security system.

To send a report to others by email, both you and the email recipients must have valid email addresses. Also, if you choose the recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails. However, if you type the email address manually, read access is not required.

Printing a Report

It may be convenient for you to have a printed copy of a report. You may need to review a report when your computer is not available, or you may need to take a copy of a report to a meeting.

You can use run options to print a report and choose a printer (p. 70).

Distributing a Report by Bursting

Bursting is the process of running a report once and then sending the results to recipients, each of whom sees only a subset of the data. Distribute reports by bursting them when you want users to receive or view reports that contain data applicable only to them.

If you distribute burst reports by email, the recipients are specified by the burst options. Note that if you choose the recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails.

If the burst report contains a drill-through link to another report and the burst report is distributed by email, set the email options to include a link to the report. Otherwise, if you include the report in the email, the drill-through links in the burst report will not work.

You can burst reports only if the report author defined burst options for the report.

You can use advanced run options (p. 70) to distribute a report by bursting.

You must have read and write permissions for the report to enable bursting.

Create Distribution Lists and Contacts

Use distribution lists if you want to send a report to more than one recipient at a time. Distribution lists contain a collection of users, groups, roles, contacts, or other distribution lists.

If a recipient is not part of the Cognos security system, you can create a contact for this person. The contacts you create can also be assigned as contacts for reports.

Note that if you choose the email recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails.

Steps for a Distribution List

1. In Cognos Connection, in the upper-right corner, click **Launch, Cognos Administration**.

2. On the **Configuration** tab, click **Distribution Lists and Contacts**.

   Tip: To remove a distribution list or contact, select the entry and click the delete button.

3. On the toolbar, click the new distribution list button .

4. Type a name and, if you want, a description and screen tip for the distribution list, and click **Next**.

5. If you want to add to the distribution list, click **Add** and choose how to select entries:

   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.

   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.

   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

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

     Here is an example:

     Cognos/Authors;LDAP/scarter;

6. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

7. Click **Finish**.

You can now choose this list when you specify recipients for a report.

Steps for a Contact

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.

2. On the **Configuration** tab, click **Distribution Lists and Contacts**.

   Tip: To remove a distribution list or contact, select the entry and click the delete button.

3. On the toolbar, click the new contact button .

4. Type a name and email address for the contact and, if you want, a description and screen tip, and click **Finish**.

Drilling to View Related Data

Reports that you run in Cognos Connection and view in Cognos Viewer support various drill operations so that you can view different layers of related data. You can perform drill operations in lists, crosstabs, and charts.

You can

- drill up or drill down within the same report

- drill through to another target

- drill through to another target passing multiple values

Drill Up or Drill Down

You can drill up and drill down within a report that is run from Cognos Connection. Reports run from Cognos Connection appear in Cognos Viewer.

In lists and crosstabs, hyperlinks identify drillable items. In charts, the pointer changes to a hand when you pause the pointer over a drillable item, and a tooltip indicates what you are drilling on. For example, a column chart shows revenue by product line by year. You can drill on a single axis, such as product line or year. You can also drill on both axes, such as Camping Equipment and 2005. In this case, you are drilling on the intersection of Camping Equipment and 2005.

After you drill up or drill down, you can save the report as a report view for later viewing. For more information, see "Create a Report View" (p. 74).

The drill-up and drill-down functionality is available only when you use dimensionally structured data and view the report in HTML format. You can drill only on members in a level.

By default, the drill-up and drill-down functionality is enabled.

Steps

1. Run the report in Cognos Connection and view it in Cognos Viewer.

   Tip: Alternatively, you can open an Analysis Studio report or Query Studio report in their respective studios.

2. Right-click the report item you want to drill on and click **Drill Up** or **Drill Down** .

Drill Through to Another Target

You can navigate from a report to one of the following targets:

- a Query Studio report
- a Report Studio report
- an Analysis Studio analysis
- a Microsoft SQL Server Analysis Services (SSAS) action

You can also navigate from a report or analysis authored in one package to more detailed information in a report which was authored in another package. For example, this is useful when you want to drill from a summarized OLAP source, such as your sales information, into the detailed relational or transactional information, such as your inventory volumes.

Drilling through from one report to another is a method of passing information from the source (your starting report) to the target (your ending report). For example, you may be evaluating a report and discover something you need to investigate in a certain product line. You can drill through to the detailed target report which provides a focused view of that product line. When

drilling through to the target, the product line you selected in the source is passed and the target report is run with that filter, making a more focused report.

By default, the ability to drill through from one report to another is enabled. You can disable it by using the **Enable selection-based interactivity** option. For more information, see "Disable Selection-based Interactivity" (p. 87).

Before you can navigate to another target, a drill-through definition must be created in either the Report Studio source report or in Cognos Connection.

Steps

1. Run the report in Cognos Connection and view it in Cognos Viewer.

    Tip: Alternatively, you can open an Analysis Studio report or Query Studio report in their respective studios.

2. Right-click the report item from which you want to navigate and click **Go To** [icon] , **Related Links**. The **Go To** page appears, showing the available targets.

    Note: If there is only one possible target for the column, the reports runs and appears in Cognos Viewer.

3. Click the target you want to navigate to.

Depending on how the drill-through definition was set up and the report type, the target opens in either Cognos Viewer, Query Studio, or Analysis Studio.

Drill Through to Another Target Passing Multiple Values

You can have a report that contains a drill-through definition that can be filtered by multiple values in a single query item. For example, while analyzing an OLAP source, you may want to focus on Canada and the United Kingdom. When you drill through, the target report is filtered by both countries. After you run the report in Cognos Viewer, you are prompted to choose values when you navigate from the report to the drill-through target. The values you specify are used to filter the results in the target.

For more information about drilling through to a target, see "Drill Through to Another Target" (p. 91).

Drilling through using multiple values is available regardless of whether the drill-through definition is authored in the Report Studio source report or in Cognos Connection, Drill-through Definitions. In previous releases, this functionality was available only when the definition was authored in Cognos Connection.

Steps

1. Run the report in Cognos Connection and view it in Cognos Viewer.

    Tip: Alternatively, you can open an Analysis Studio report or Query Studio report in their respective studios.

2. Ctrl+click to select more than one value in a column.

- If hyperlinks appear in the column in which you are attempting to select cells, click in the empty area around the hyperlinks.

- If there are no visible hyperlinks but you know that a drill-through target exists, select the cells you want to use as the filter, regardless of whether they are in the same column. Note that when you select multiple values from different columns, the resulting filter in the target report performs an *and* rather than an *or* operation with the values passed, for example, Canada and Camping Equipment; United Kingdom and Fax.

3. Right-click in one of the selected cells from which you want to navigate, and from the menu that appears, do one of the following:

    - Under **Go To**, click the drill-through target name, if one exists.

    - Under **Go To**, click **Related Links**. On the **Go To** page, click the target report you want to run.

The target report runs and if it can be filtered by the selection made in the source report, the target is filtered by those values.

Series 7 Reports in Cognos Connection

If your administrator configures Cognos 8 to use the Cognos Series 7 namespace, you can see Series 7 entries in Cognos Connection. When you run a Series 7 report, the report runs in the Series 7 application used to create it.

The contents of the Series 7 NewsIndex appears at the bottom of the page in **Public Folders**. The contents of your Series 7 personal NewsBox appears at the bottom of the page in **My Folders**.

Alternatively, PowerPlay 7.3 can be configured to use Cognos Connection rather than Upfront as a portal. However, if you are accessing content from other Cognos applications or versions previous to PowerPlay 7.3, the administrator may still depend on the Upfront portal.

When you access Series 7 entries from Cognos Connection, consider the following things:

- If the Series 7 namespace and the Cognos 8 namespace are different, you must log on to both. Otherwise, you cannot see content in both areas.

- If you log off when you are in Upfront, you can no longer access Series 7 entries in Cognos Connection. You should always log off in Cognos Connection.

- If you belong to several Series 7 user classes, you are unable to select a different user class when you access Upfront through Cognos Connection.

- If you use an Upfront theme other than standard70, an error message may appear when you click the **More** link in the **Actions** column. You cannot access Series 7 entries.

- If you want to cut, copy, and paste Series 7 entries, use the More link in the **Actions** column, and then use the Upfront toolbar.

- If you perform a search in Cognos Connection, the Series 7 entries are not included in the search.

- You cannot combine Cognos 8 entries and Series 7 entries in a single folder or NewsBox.

For information about working with Series 7 entries in Upfront, see the Cognos Series 7 *Web Portal User Guide*.

Series 7 PowerPlay Reports and Cubes

After Series 7 PowerPlay reports and cubes are published to the Cognos 8 portal, you can use PowerPlay authoring tools to create and edit Series 7 PowerPlay reports. For more information about PowerPlay authoring tools, see the PowerPlay Web *User's Guide*.

You can change the default run options of Series 7 PowerPlay reports and cubes (p. 95) and select multilingual properties (p. 96).

Series 7 PowerPlay reports and cubes function differently from other reports. The following actions do not apply to Series 7 PowerPlay reports and cubes:

- viewing the run history and report output versions

- specifying how long to keep report outputs and histories

- canceling and suspending reports

- specifying prompt values for report formats other than PDF

- specifying language for the content of reports

- running a report as the owner

- scheduling reports

- distributing reports

Run or Open a Series 7 PowerPlay Report

You can run Series 7 PowerPlay reports in the following formats (p. 76):

- If the HTML icon [icon] is visible, the report opens in PowerPlay Web Explorer.

- If the PDF icon [icon] is visible, the report runs in the PowerPlay Web Viewer.

PowerPlay administrators can restrict who can open cubes. For information about publishing Series 7 PowerPlay reports and cubes in Cognos 8, see the PowerPlay *Enterprise Server Guide*.

If you use secured Series 7 cubes, the namespace against which the cubes are secured must be configured as an authentication source in Cognos 8. This namespace need not be the only authentication namespace or the primary logon for the user. For more information about configuring authentication namespaces see the *Installation and Configuration Guide*.

Before you can run or open Series 7 PowerPlay reports and cubes [icon] directly from Cognos 8, you must have both PowerPlay 7.3 and Cognos 8 installed and configured. You also must have the following permissions:

- execute and read permissions to run or open a report or cube

- read and traverse permissions to access the folder that contains the report or cube

- read and write permissions to set properties for cubes and reports

Step

- In Cognos Connection, click the report that you want.

Depending on the default action for the report, the report runs in either PDF format (default) or opens with PowerPlay Web Explorer.

If you have the required permissions, you can change the run options for Series 7 PowerPlay reports and cubes . For information about using PowerPlay Web Explorer and PowerPlay Web Viewer, see the Cognos PowerPlay Web *User's Guide*.

Tip: To run any Series 7 PowerPlay report in PowerPlay Web Explorer, click the open with PowerPlay Explorer button in the actions toolbar. You can also click **More** next to the report you want and then open the report in Analysis Studio or Report Studio. The migration tools must already be installed. For information about installing these tools, see the Cognos 8 Migration and Upgrade Tools *Installation Guide*. When you open the report, it is upgraded to the format of the studio that you opened it in. If you save the report, it is saved in the upgraded format. There may be differences between the original PowerPlay report and the Cognos 8 version of the report. If you do not save the report, it remains a Series 7 PowerPlay report. For more information about upgrading Series 7 PowerPlay reports, see the Cognos 8 Migration and Upgrade *User Guide*.

Change the Defaults for a Series 7 PowerPlay Report

You can change the defaults for Series 7 PowerPlay reports. You can select one of the following default actions when a report is run:

- run the report in PDF format (default)

- open the report with PowerPlay Web Explorer

For HTML format reports, you can choose to open the report in design mode (without data). Opening a report in design mode is useful to quickly view the structure of the report.

For PDF format reports, you can choose to be prompted for values that filter the range of data included in a report. For example, you can specify a date range that is a subset of the dates available in the report. If the Series 7 PowerPlay report was created with prompt values, you are prompted to enter values when the report runs.

Steps

1. In Cognos Connection, click the set properties button on the actions toolbar to the right of the report you want to run.

2. Click the **PowerPlay report** tab.

3. Under **Default action,** select the default action for when the report is run.

4. For HTML reports, if you want to open the report without data, design mode, select the **Open in design mode** check box.

   Tip: You can also click the open with PowerPlay Web Explorer in design mode button if it appears in the actions toolbar.

5. For PDF reports, if you want to be prompted for values, select the **Prompt for values** check box.

   Tip: The Prompt for values check box appears only if prompt values are created for the report. You can also click More next to the report you want and then click the run the report in PDF format and prompt for values button .

Open a Series 7 Cube

You can open Series 7 cubes and work with them in PowerPlay Web Explorer.

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

Step

• In Cognos Connection, click the cube that you want.

Multilingual Properties for Series 7 Reports and Cubes

In Cognos Connection, you can select the multilingual properties of a Series 7 report or cube (p. 79). The name, screen tip, and description uses the language that you select.

The content, data, category labels, and other labels do not change. The language for these items is set by the PowerPlay administrator who creates the report or cube.

Chapter 5: Agents

You can create agents in Event Studio (p. 100) to monitor your organization's data for occurrences of business events, and then perform tasks. For example, tasks can include sending an email, adding information to the portal, and running reports. For more information, see the Event Studio *User Guide*.

After an agent is published to the portal, use Cognos Connection to do the following:

- run the agent (p. 97).

- change default properties. (p. 98)

- create an agent view. (p. 99)

- enable an alert list. (p. 100)

- add or remove yourself from an alert list. (p. 100)

- receive news item headlines (p. 101).

- view a list of the most recent event instances for an agent (p. 102).

- view the run history. (p. 120)

- rerun a failed agent with the initial parameters (p. 121)

You can schedule agents to run at a specified time or based on a trigger, such as a database refresh or an email. You can also view the run history of scheduled agents. For more information, see "Schedule Management" (p. 107).

Run an Agent

Usually, agents run automatically according to the schedule specified by the agent author. However, you can run the agent manually at any time if you want to check for occurrences of specified events and perform specified tasks if those events occur.

For example, an agent is created to send an email to sales staff when they reach 75 percent of their sales quota for the month. The agent prompts for the sales region. A sales manager specifies Spain, and emails are sent only to sales staff in Spain.

You must have execute permission to run an agent. You must have traverse permissions for the folder that contains the agent.

Steps

1. In Cognos Connection, click the run with options button ▶ on the actions toolbar next to the agent you want to run.

2. Under **Time**, click **Now** to run the agent now or click **Later** to specify a later date and time.

3. If you want the agent to prompt for values to filter the results it retrieves, under **Prompt Values**, select the **Prompt for values** check box.

4. Click **Run**.

   The confirmation page appears.

   You are prompted for values if the agent specification or model includes prompts or if you have access to multiple data source connections or signons.

5. To view the run history of the agent, select **View the details of this agent after closing this dialog**.

6. Click **OK**.

   The options override the default agent options for the current run only.

Change Default Agent Properties

You can change the defaults that are set for agents in Event Studio, such as whether to use prompt values and run as the owner. If the agent contains one or more tasks with a destination of **My Folders**, and someone other than the owner runs the agent, the task fails unless run as the owner is selected.

You can run an agent (p. 97), create agent views (p. 99), and create and edit agents in Event Studio (p. 100).

You must have execute permissions for the agent. You must have traverse permissions for the folder that contains the agent.

Steps

1. In Cognos Connection, click the set properties button ⚙ on the actions toolbar next to the agent you want to run.

2. Click the **Agent** tab.

   The tasks in the agent are shown.

3. Under **Default action**, specify the default action for the agent.

4. If you want the agent to prompt for values to filter the results that it retrieves, under **Prompt Values**, select the **Prompt for values** check box. The **Prompt for values** check box appears only if prompt values are created for the agent in Event Studio.

5. If you want the agent to run using the owner credentials, click the check box next to the owner listed under **Run as the owner**.

6. To allow users to add themselves to the alert list for the agent, click the **Allow users to add themselves to the alert list** check box.

7. Click **OK**.

   The next time the agent runs, it uses these properties instead of the original defaults.

Create an Agent View

Agent views share event definition and tasks with the agent but can have different properties, such as prompt values and run as the owner (p. 28).

Creating an agent view does not change the original agent. Except for changes to notification lists, any changes to the original agent are automatically reflected in the agent view. You can determine the source agent for an agent view by viewing its properties. The agent view properties also provide a link to the properties of the source agent.

If the source agent is deleted or moved to another location, the agent view icon changes to indicate a broken link, and the properties link to the source agent is removed.

If you want to change the properties of an agent and do not need to retain an agent with the original properties, change the default agent properties (p. 98). If you want to use a generic agent as the basis for a new agent, make a copy of the agent (p. 30). If you want an agent to appear in more than one location, create a shortcut (p. 20).

To create an agent view, you must have execute or read permissions for the original agent.

Steps

1. In Cognos Connection, locate the agent you want to use to create the agent view.

2. Under **Actions**, click the agent view icon next to the agent.

3. In the **Name** box, type the name of the entry.

4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view (p. 37). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

5. If you do not want to use the target folder shown under **Location**, choose another location, click **Select another folder**, select the target folder, and click **OK**.

6. Click **Finish**.

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

The agent view has the same run options and properties as the original entry. For information about changing agent properties, see "Entry Properties" (p. 23).

Open or Create an Agent from Cognos Connection

You can open or create agents from Cognos Connection and work with them in Event Studio.

To open an existing agent in Event Studio, do the following:

- In **Public Folders** or **My Folders**, click the agent.

To create a new agent in Event Studio, do the following:

- In Cognos Connection, in the upper-right corner, click **Launch**, **Event Studio**.

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

Enable an Alert List for an Agent

By granting users permission to add an alert list to an agent, users can monitor business events that are important to them. With this permission, users can add themselves to the alert list and be alerted by email as a Bcc recipient when the agent runs and the associated tasks are performed.

The permission to add an alert list to an agent does not extend to an agent view associated with the agent. You must grant permission for the agent view independently.

To grant permission for an alert list, you must have execute permission for the agent and traverse permission for the folder that contains the agent.

Steps

1. In Cognos Connection, click the set properties button next to the agent for which you want to enable an alert list.

2. Click the **Agent** tab, and select the **Allow users to add themselves to the alert list** check box.

Emails are sent whenever the agent is run interactively or in the background according to a schedule.

Add Yourself to or Remove Yourself from an Alert List for an Agent

Because an agent monitors important business events, you may want to add yourself to the alert list for the agent. When you subscribe to an alert list, you receive an email notification when the agent is run. You can also view and manage the alert list for the agent as a watch item.

Adding yourself to the alert list of an agent does not automatically add you to the alert list for any agent views associated with the agent. If you want to receive alerts for an agent view, you must add yourself to the alert list for the agent view.

The agent author must include an email task with the agent and enable an alert list for the agent .

To add yourself to the alert list of an agent, you must have read and traverse permissions for the agent. You must also have an email address defined in your LDAP security profile or in the **My Preferences**, **Personal** tab.

Steps for One Alert List

1. In Cognos Connection, locate the agent.

2. In the **Actions** column, click **More**.

3. Click **Add me to the alert list** or **Remove me from the alert list** .

4. Click **OK**.

Note the change for the alert list in the watch item list. To view your watch items, from the **My Area** menu, click **My Watch Items**.

Steps to Remove Yourself from Multiple Alert Lists

1. In Cognos Connection, click the my area icon and then click **My Watch Items**.

2. On the **Alerts** tab, select the alerts to delete from the alert list.

3. Click the remove me from the alert list button.

Remove All Users from the Alert List for an Agent

You can remove all users from the alert list for an agent. Any user that is currently on the alert list is removed. For more information about alert lists, see "Add Yourself to or Remove Yourself from an Alert List for an Agent" (p. 100).

You must have set policy permission for the agent.

Steps

1. In Cognos Connection, locate the agent.

2. In the **Actions** column, click **More**.

3. Click **Remove all from the alert list**.

Receive News Item Headlines

The author of an agent can specify that news item headlines be published to a folder in Cognos Connection when an event occurs. To be able to read headlines as an RSS-style list, you must set up a page in Cognos Connection that includes a Cognos Navigator portlet that displays the folder where the headlines are published. Edit the properties of the portlet to view the entries as a news list. For instructions, see "Pages and Dashboards" (p. 49).

For more information about news items, see the Event Studio *User Guide*.

View the Most Recent Event List

The most recent event list compares current data with data from the last time the agent ran and groups events by event status.

For example, an agent is created to tell you when the quantity sold of any product by any sales person in your database changes. The first time the agent runs, the most recent event list identifies all sales as new events.

Product number	Sales person	Quantity sold
NEW EVENTS		
3345	Ashley McCormick	25
3345	Bayard Lopes	15
2256	Alessandra Torta	100

The second time the agent runs, it finds the following product sales.

Product number	Sales person	Quantity sold
3345	Ashley McCormick	35
3345	Bayard Lopes	15
2256	Ashley McCormick	15
2256	Alessandra Torta	150

If you now view the most recent events list, you see the following list:

Product number	Sales person	Quantity sold
NEW EVENTS		
2256	Ashley McCormick	15
ONGOING (UNCHANGED)		
3345	Bayard Lopes	15
ONGOING (CHANGED)		

Product number	Sales person	Quantity sold
3345	Ashley McCormick	35
2256	Alessandra Torta	150

Steps

1. In Cognos Connection, locate the agent you want.

2. Under **Actions,** click the set properties icon.

3. Click the **Agent** tab.

4. Under **Default action,** click **View most recent event list.**

5. Click **OK.**

Chapter 6: Microsoft Office Documents

If Microsoft Office workbooks and presentations are available in Cognos Connection, you can access and open them in Microsoft Office.

Download a Microsoft Office Document

You can download a Microsoft Office document from Cognos Connection if it was published in Cognos 8 using Cognos 8 Go! Office or Cognos BI Analysis for Microsoft Excel ®. For more information, see the Cognos 8 Go! Office *User Guide* and the Cognos 8 BI Analysis for Microsoft Excel ® *User Guide*.

You can download documents created in Microsoft Office Excel, Microsoft Office PowerPoint and Microsoft Office Word. The default action for any Microsoft Office document is to download it.

You must have read and traverse permissions to access Microsoft Office documents in Cognos Connection.

Steps

1. In Cognos Connection, locate the document that you want to open.

2. Click **more** on the actions toolbar to the right of the document that you want to download.

   The Cognos Connection actions page opens.

3. Download the Microsoft Office document:

   - For a Microsoft Office workbook, click the **View most recent document in Excel** object .

   - For a Microsoft Office presentation, click the **View most recent document in PowerPoint** object .

   - For a Microsoft Office word document, click the **View most recent document in Word** object .

   - For a Microsoft Office document of unknown type, click the **View most recent document** object .

   The **File Download** dialog box appears.

4. Click **Open** or **Save** and follow the prompts that appear.

   When you open the document, it opens in the application that was used to create it.

You can now perform the same actions that you would perform for any Microsoft Office document of the selected type.

Chapter 7: Schedule Management

You can schedule Cognos 8 entries to run at a time that is convenient for you. For example, you may want to run reports or agents during off hours when demands on the system are low. Or you may want to run them at a regular weekly or monthly interval.

You can schedule entries to run at specified intervals. You can schedule entries individually (p. 108) or use jobs to schedule multiple entries at once (p. 109). Jobs have their own schedules independent from report schedules.

You can schedule entries to run on the last day of each month (p. 109). You can also schedule entries to be triggered by occurrences, such as database refreshes or emails (p. 112).

Only one schedule can be associated with each entry. If you require multiple schedules for a report or agent entry, you can create report views (p. 74) or agent views (p. 99) and then create a schedule for each view.

After you create a schedule, the entry or job runs at the time and date specified. You can then view the scheduled entries and manage them. For more information, see "Activities Management" (p. 115).

Prompts in Scheduled Entries

If an entry that contains prompts is scheduled, you must save the prompt values or specify default values (p. 80) to ensure that values exist when the report runs according to the schedule.

In a job, you can specify prompt values for job steps. When an entry runs as part of a job, the prompt values saved in the job definition are used instead of the values saved with the entry. If no values are specified in the job definition, Cognos 8 uses the values saved in the entry.

Priority for Scheduled Entries

When you schedule an entry, you may be able to select a run priority from 1 to 5. For example, an entry with priority 1 runs before an entry with priority 5. If there is more than one entry with a specific priority, the one that arrived in the queue first runs first. The default is 3. If you do not have permissions for entry priorities, the priority appears but you can not change it.

When you schedule a job, you can set priority for the whole job only, not for individual entries within a job. However, you can change the priority of individual entries when they are pending in the queue.

The priority of entries in the queue does not affect an entry that is already running. The running entry completes and then the queue priority is checked for the next entry to run.

For more information, see "Manage Entry Run Priority" (p. 119).

Run Histories for Scheduled Entries

Cognos 8 keeps history information each time a scheduled entry runs. You can use the run history for an entry to see the times at which it ran and whether the it ran successfully . For more information, see "View the Run History for Entries" (p. 120).

Schedule an Entry

You schedule an entry to run it at a later time or at a recurring date and time. For example, you can schedule a report or an agent.

If you no longer need a schedule, you can delete it. You can also disable it without losing any of the scheduling details. You can then enable the schedule at a later time. For more information, see "Activities Management" (p. 115).

You can schedule an entry to run on the last day of each month (p. 109) or as part of a job (p. 109). You can schedule reports based on trigger occurrences (p. 112).

To schedule an entry, you need the permissions that are required to run the entry. For example, to schedule a report or report view, you must have read, write, execute, and traverse permissions for it. To schedule a child report view, you must have execute permissions on the parent report. You also require the following access permissions for any data sources used by the report:

- dataSource - Execute and Traverse

- dataSourceConnection - Execute and Traverse

  With only Execute access, you are prompted to log on to the database.

- dataSourceSignon - Execute

Steps

1. Click the schedule button for the entry you want to schedule ⬚ .

2. Set the priority for the scheduled entry.

   Select a lower number for higher priority. The default is 3.

3. Under **Frequency**, select how often you want the schedule to run.

   The **Frequency** section is dynamic and changes with your selection. Wait until the page is updated before selecting the frequency.

4. Under **Start**, select the date and time when you want the schedule to start.

5. Under **End,** select when you want the schedule to end.

   Tip: If you want to create the schedule but not apply it right away, select the **Disable the schedule** check box. To later enable the schedule, clear the check box.

6. If additional options are available on the **Schedule** page, specify what you want.

For example, for reports, you can select formats, languages, delivery method (including how to save report output files), and prompt values. For more information, see "Reports and Cubes" (p. 67).

7. Click **OK**.

A schedule is created and the report runs at the next scheduled time.

Example - Schedule an Entry on the Last Day of the Month

You want to schedule a financial report to run automatically on the last day of each month for the next year.

Steps

1. Click the schedule button for the entry you want to schedule.

2. Under **Frequency**, select **By Month**, and then select **Day**.

3. Enter **Day** 31 **of every** 1 **month**(**s**).

   Entering 31 as the day ensures that the entry runs on the last day of the month, regardless of how many days are in the month.

4. Under **Start**, select the last day of the current month as the day you want the monthly schedule to start.

5. Under **End**, select the last day of the same month next year as the day you want the monthly schedule to end.

6. Click **OK**.

Use Jobs to Schedule Multiple Entries

You can set the same schedule for multiple entries by creating a job. A job identifies a collection of reports, report views, and other jobs that are scheduled together and share the same schedule settings. When a scheduled job runs, all the entries in the job run.

Tip: If a job item is unavailable, you can select a different link by clicking **Link to an entry**.

Jobs contain steps, which are references to individual reports, jobs, and report views. You can specify whether to run the steps all at once or in sequence.

- When steps are run all at once, all the steps are submitted at the same time. The job is successful when all the steps run successfully. If a step fails, the other steps in the job are unaffected and still run, but the job has a **Failed** status.

- When the steps are run in sequence, you can specify the order in which the steps run. A step is submitted only after the preceding step runs successfully. You can choose to have the job stop or have the other steps continue if a step fails.

You can schedule a job to run at a specific time, on a recurring basis, or based on a trigger, such as a database refresh or an email (p. 112).

The individual reports, jobs, and report views in steps can also have individual schedules. Run options for individual step entries override run options set for the job. You can set run options for the job that serve as the default for step entries that do not have their own run options.

You can run reports to produce outputs based on the options that you define, such as format and language.

Cached Prompt Data

For reports that prompt for values each time that the report is run, you may want to use cached prompt data. Reports run faster because data is retrieved from the cache rather than from the database.

The cache is used only when a requested language is the same as one in the cache. For example, the cache contains data for English, English (United States), and German (Germany). When prompted, you request English (United States) for the report. There is an exact match and the cached data is used. The cached data is also used when there is a partial match. If you request English (Canada), the cached data for English is used. If you request German (Austria), there is no match and the cached data is not used.

You can use caches for reports or report views. For report views, the report view cache is used first. If no report view cache is found, the cache for the associated report is used.

You must use a job to create or refresh a cache. You can refresh the cache automatically by scheduling the job to run periodically. If you want to use live data the next time that you run the report, you can clear the cache.

Permissions

Permissions required to include an entry as part of a job vary depending on the type of entry. The permissions are the same as for scheduling an entry (p. 108).

Steps

1. Click the new job button .

2. Type a name and, if you want, a description and screen tip for the job, select the location in which to save the job, and then click **Next**.

   The **Select the steps** page appears.

3. Click **Add**.

4. Select the check boxes for the entries you want to add and click the right arrow button .

   Tip: You can also click **Search**, and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. When you find the entry you want, click the right arrow button to list the entry in the **Selected entries** box and click **OK**.

   When the entries you want appear in the **Selected entries** box, click **OK**.

Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

5. If you want to change run options for an individual entry when it runs as part of the job, click the set icon ⬚🖉, click **Produce report outputs**, select the **Override the default values box**, make the changes, and click **OK**.

   Tip: To return to defaults for individual entries, click the delete button.

6. If you want to refresh the cache for a report when the job runs, click the edit icon next to the report, and then from the **Run the report to** menu, click **Refresh the report cache**. Click **Override the default values**. To accept the displayed language, click **OK**. To change the language, click **Select the languages**, select the languages you want, and then click **OK**. Click **OK** to accept the displayed languages.

   Tip: To clear the cache, click the delete button.

7. If you want to create or refresh the cache, click the set icon, click **Refresh the report cache**, select the **Override the default values box**, add languages, if you want, and click **OK**.

   Tip: To clear the cache, click **More** next to the report whose cache you want to clear, click **Clear the cache**, and click **OK** twice.

8. Under **Submission of steps**, select whether to submit the steps **All at once** or **In sequence**.

   If you select **In sequence**, the steps are executed in the order they appear in the **Steps** list. If you want the job to continue to run even if one of the steps fails, select the **Continue on error** check box.

   Tip: To change the order, click **Modify the sequence**, make the changes, and click **OK**.

9. If you want to specify default run options at the job level, under **Defaults for all steps**, click **Set**.

10. If you want to override defaults, select the category and select the **Override the default values** check box and select the default options you want for the job and click **OK**.

11. Select the action you want:

    * To run now or later, click **Run now or at a later time** and click **Finish**. Specify the time and date for the run. Click **Find only** or **Find and fix**, then click **Run**. Review the run time and click **OK**.

    * To schedule at a recurring time, click **Schedule to run at a recurring time** and click **Finish**. Then, select frequency and start and end dates. Click **Find only** or **Find and fix**, then click **OK**.

      Tip: To temporarily disable the schedule, select the **Disable the schedule** check box. To view the schedule status, see "Activities Management" (p. 115).

    * To save without scheduling or running, click **Save only** and click **Finish**.

A job is created and will run at the next scheduled time.

Trigger-based Entry Scheduling

You can schedule entries based on an occurrence, such as a database refresh or an email. The occurrence acts as a trigger, causing the entry to run. For example, you may want to run a report every time a database is refreshed.

Trigger-based scheduling may be used to run entries automatically based on an occurrence. It may also be used to limit when users can run entries. For example, in a warehouse environment where the database is refreshed only once a week, there is no need to run reports more frequently.

Trigger-based scheduling applies only to the entry, not to any entry view associated with it. For example, if trigger-based scheduling applies to a report, it does not apply to report views associated with the report. However, you can schedule a report view using a trigger.

Setting Up Trigger-based Scheduling

To schedule an entry based on an occurrence and confirm trigger-based scheduling, you must have read, write, execute, and traverse permissions. You also require the following access permissions for all data sources used by the entry.

Data source	Permissions
dataSource	Execute and Traverse
dataSourceConnection	Execute and Traverse
	With only Execute access, you are prompted to log on to the database.
dataSourceSignon	Execute

Before setting up trigger-based scheduling, ensure that your credentials exist and are up to date.

Tip: Click the my area button [icon], **My Preferences**, and, on the **Personal** tab, click **Renew the credentials**.

Follow this process to set up trigger-based scheduling:

❑ Schedule an entry based on the occurrence .

❑ Have your administrator set up the trigger occurrence on a server.

Trigger occurrences can also be set up by an SDK developer using the Cognos 8 Software Development Kit (SDK). For more information, see the *SDK Developer Guide*.

Schedule an Entry Based on an Occurrence

As part of setting up trigger-based scheduling, you must schedule an entry based on an occurrence.

Steps

1. Click the schedule button next to the entry you want to schedule.

2. Under Frequency, click the **By Trigger** tab.

3. In **Trigger name**, type the name of the trigger occurrence.

   Note: The trigger name that you enter may be provided to you by your administrator or developer. If not, you must inform your administrator or developer of the trigger name that you use.

4. The default start date is "now", and the default end date is "forever", which means the trigger schedule will always run when the trigger is fired (either from trigger.bat or from an SDK app) . If you put in a valid start and end date, the trigger schedule can only be fired between those dates.

5. Click **OK**.

Chapter 8: Activities Management

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

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

You can set run priority for entries (p. 119). You can also view the run history for entries (p. 120), specify how long to keep run histories (p. 121), and rerun failed entries (p. 121).

If you switch views, you must refresh to see current data. For example, if you switch from **Past Activities** to **Upcoming Activities**, you must refresh to see current data in the panes.

You must have the Scheduling capability to access **My Activities and Schedules**.

Manage Current Activities

Current activities are entries that are currently being processed in Cognos 8. Each entry is listed by name and shows the request time and the status, and the priority for background activities. The bar chart shows the total number of entries, broken down by the number of pending, executing, waiting, and suspended entries.

You can suspend background entries and release them later when you want them to run. You can permanently cancel runs for entries that have one of the following statuses:

- pending in the queue

- executing

- suspended

- waiting for a process external to Cognos 8 to complete

You can filter the entries to display only those you want. In **My Activities and Schedules**, you can choose to display only those entries with a specific status or priority, or entries of a specific type or scope.

If you cancel an entry that contains other entries, such as a job or an agent, steps or tasks that have not yet been completed are cancelled. However, steps or tasks that have already completed remain completed.

You can change the priority of entries (p. 119) and view the run history (p. 120).

Steps in Cognos Connection

1. Start Cognos Connection.

2. In the upper-right corner, click the my area button 🔒 , and click **My Activities and Schedules**, **Current Activities**.

3. In the **Filter** menu, click the filtering items that you want to use.

4. Click **Apply**.

    The list shows the entries that you selected.

5. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

    Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

Goal	Button
Show entry details	🗏
Hide entry details	🗏
Cancel the run	⏩
Suspend the run	⏸
Release suspended entries	⏯
Set entry priority	🗏

Manage Past Activities

Past activities are entries that have finished processing in Cognos 8.

Each entry is listed by name and shows the request time and the status. You can sort the **Request time** and **Status** columns. The bar chart shows the total number of entries, broken down by status. If an entry has failed, a button appears showing the severity of the error.

You can filter the entries to display only those you want. In **My Activities and Schedules**, you can choose to view a list of activities that occurred over a specified length of time, such as the last four hours or the last day, or you can specify a date or time range. You can filter by status, type, and scope.

You can view the run history .

Steps in Cognos Connection

1. Start Cognos Connection.

2. In the upper-right corner, click the my area button ⬛ and click, **My Activities and Schedules**, **Past Activities**.

3. From the **Filter** menu, click the filtering items that you want to use.

    Tips: If you want to use advanced filtering options, click **Advanced options**. To reset all selections to the default settings, click **Reset to default**.

4. If an error occurred when the entry ran, pause over the error button next to the status to see the severity of the error.

5. Click **Apply**.

    The list shows the entries that you selected.

6. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, click one of the following buttons on the toolbar.

Goal	Button
Show entry details	
Hide entry details	

Manage Upcoming Activities for a Specific Day

You can choose to view a list of all upcoming activities that are scheduled for a specific day. Each entry is listed by name and shows the request time, the status, and the priority. A bar chart shows an overview of activities broken down by scheduled and canceled items.

You can filter the entries to display only those you want. You can choose the day for which you want to view upcoming activities. You can filter by status, priority, type, and scope.

You can also change the priority of an entry in the queue.

Steps in Cognos Connection

1. Start Cognos Connection.

2. In the upper-right corner, click the my area button ⬛ and click **My Activities and Schedules**, **Upcoming Activities**.

3. From the **Filter** menu, click the filtering items that you want to use and click **Apply**.

4. Click **Apply**.

    The list shows the entries that you selected.

5. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

    Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

Goal	Button
Show entry details	
Hide entry details	
Cancel the run	
Re-schedule a run that was cancelled	
Set entry priority	

Manage Scheduled Activities

You can choose to view a list of scheduled entries. Each entry is listed by name, status, and priority. A bar chart shows you an overview of activities broken down by enabled and disabled schedules.

You can filter the entries to display only those you want. You can choose to display only those entries with a specific status or priority, or entries of a specific type or scope.

You can set properties, run the schedule once, disable and enable scheduled entries, modify the schedule, remove the schedule, set the priority , and view the run history . Depending on the entry, you may also be able to perform other functions, such as view outputs or event lists.

For more information on schedules, see .

Steps in Cognos Connection

1. Start Cognos Connection.

2. In the upper-right corner, click the my area button 　, and click **My Activities and Schedules**, **Schedules**.

3. From the **Filter** menu, click the filtering items that you want to use and click **Apply**.

4. Click **Apply**.

The list shows the entries that you selected.

5. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

Goal	Button
Show entry details	
Hide entry details	
Enable the schedule	
Disable the schedule	
Set entry priority	

Manage Entry Run Priority

Scheduled entries can be assigned a priority from 1 to 5. For example, an entry with priority 1 runs before an entry with priority 5. If there is more than one entry with the same priority, the one that arrived in the queue first runs first. The default priority is 3.

Interactive entries always run immediately and priority cannot be changed once they are running.

You set the priority for an entry when you schedule it . When an entry is in the current, upcoming, or scheduled queue, you can change the priority.

You may want to set a low priority for entries that take a long time to run so that other entries in the queue are not delayed.

When you schedule a job , you set the priority for the whole job, not for individual entries within the job. You may want to set a low priority for a job with many entries so that other entries in the queue are not delayed.

You schedule priority for the parent job. When the job runs, all the child entries inherit the priority of the parent. When the job is in the queue and is not yet running, you can update the priority. You cannot do this for the individual entries in the job. Changing the priority of the job changes the priority of all its child entries. You can view the run history of a job while it is executing and see which of its entries have completed, are executing, or are pending.

The priority of entries in the queue does not affect an entry that is already running. That entry completes and then the queue priority is checked for the next entry to run.

You must have the Scheduling capability to access manage entry run priority.

Steps in Cognos Connection

1. Start Cognos Connection.

2. In the upper-right corner, click the my area button [icon], and click **My Activities and Schedules** and then click **Current Activities**, **Upcoming Activities**, or **Schedules**.

3. To change the priority for one entry, click the arrow to the right of the entry and select **Set Priority**. To change the priority of more than one entry, select the check box for the entries you want and then click the set priority button [icon] on the toolbar.

   Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

4. From the menu, click the priority that you want, and then click **OK**. If you selected one entry, the current priority of the entry appears in the **Set the priority** box. If you selected multiple entries, the **Set the priority** box contains (**Multiple**).

The new priority appears in the **Priority** column next to the entries that you selected.

View the Run History for Entries

Sometimes entries are scheduled to run in the background, without anyone waiting to view them. This includes scheduled entries, entries that are run once and saved, and interactive entries that are saved or mailed. Interactive entries do not have run histories.

Cognos 8 keeps history information each time an entry runs in the background. The run history for an entry includes information such as the request time, start time, completion time, and whether the report ran successfully.

You can look at a more detailed run history for the entry, which includes general, error, and warning messages related to the entry and any actions you can take. If there is email associated with the entry, the status of the email delivery is included.

Some types of entries display additional information in the detailed run history page:

* For reports, a report output version (p. 82) is kept each time a report is run according to a schedule. You can view the report output version from the detailed run history.

* For jobs, you can view a list of job steps and see a detailed run history for each one. You can also see the parts of the job that have not yet completed. If the entry is part of a parent entry, you can view the parent entry that initiated the run.

You can rerun failed entries (p. 121) from the detailed run history page. You can view a list of related runs that are part of the rerun series and see a detailed run history for each one. You can specify how many run history occurrences to keep or for how long to keep them (p. 121).

Steps in Cognos Connection

1. Start Cognos Connection.

2. In the upper-right corner, click the my area button $\boxed{\text{8}}$, and click **My Activities and Schedules**.

3. Click **Schedules** or **Past Activities**.

4. Next to the entry, click the arrow and then click **View run history** $\boxed{\diamond}$.

5. If you want, select the **Status** of entries that you want to view.

   A list of selected entries appears.

6. If you want to view the run history details, in the **Actions** column, click the view run history details button $\boxed{\text{▸≡}}$ next to the entry you want. Then, if you want, from the **Severity** list, select the severity of the entries.

7. If there is a report output version, in the **Actions** column, click the view outputs button $\boxed{\text{▤}}$ for the entry you want. Then, from the **Versions** list, click the version you want. To delete a version, click **Manage versions** click the check box for the version, and then click **Delete**.

Specify How Long to Keep Run Histories

You can keep run histories for a specific number of runs or for a specific number of days or months. For example, you can keep the run histories for the ten latest runs (occurrences) or for the past two days or six months. You can also choose to keep all run histories.

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

Steps in Cognos Connection

1. Click the set properties button $\boxed{\text{🖉}}$ next to the entry you want.

2. On the **General** tab, under **Run history**, choose the retention method and type the value:

   - To keep run histories for a specific number of occurrences, click **Number of occurrences** and type the number. To save an unlimited number of run histories, set this value to 0.

   - To keep run histories for a specific length of time, click **Duration** and click either **Days** or **Months**. Type the appropriate value in the box.

3. Click **OK**.

Rerun a Failed Entry Task

When an entry, such as a report, agent task, or job runs according to a schedule or runs in the background and the entry fails, you can resubmit the failed entry with the same options that were specified in the original run.

For a job that contains steps that ran successfully and steps that did not run successfully, you are not required to rerun the entire job, but can run the job steps individually. If the job steps are run sequentially, you can rerun the job starting with the failed job step. If you wish, you can select which steps to rerun and skip the failed steps. However, the selected job steps run sequentially and if a step fails, then the steps that occur after the failed step are not run.

When you rerun a job step individually, a new run history that includes only the single job step is created for the parent job. For more information about run histories, see "View the Run History for Entries" (p. 120).

When rerunning an agent entry, associated tasks, such as an email that sends report output to a list of email recipients, are also rerun if they failed initially. If there are two associated tasks running in parallel and one task fails and one succeeds, rerunning the agent only reruns the failed task. However, if tasks are selected to run on failure, they are run again when the rerun fails.

Although the run history shows entries that ran successfully, you cannot rerun an entry that succeeded. The run options are not stored for these entries.

A rerun can fail when a task associated with a failed entry is deleted or updated.

You must have execute permission to rerun a failed task.

Steps in Cognos Connection

1. Start Cognos Connection.

2. In the upper-right corner, click the my area button ![button], and click **My Activities and Schedules**, **Past Activities**.

3. Next to the entry, click the arrow and then click **View run history details** ![icon].

    The **View run history details** page shows run details, such as start time and completion time, run status, and error messages for a failed run. Other information that appears in the page depends on whether the entry is for a single task, a job with multiple steps, or an agent with tasks. For example, if it is a single task, the report options and the report outputs appear. If it is a job with multiple steps, a **Job** section appears with the run details of the job steps.

4. Under **Status**, next to **Failed**, click **Rerun**.

    *   If the rerun task is a single task, you receive a message asking you to confirm the rerun.

    *   If the rerun task is a job with multiple job steps or an agent with tasks, the **Rerun** page appears. Select the check box next to the entries you want to rerun.

    Tips: You can also rerun failed entries by clicking **Rerun** in the **Outstanding to complete** section. To rerun a single job step, in the **Job** section, in the **Actions** column, click the view run history details button ![button] for the failed step.

Appendix A: Troubleshooting Cognos Connection

You can find troubleshooting topics for all Cognos 8 components in the troubleshooting section of the *Administration and Security Guide*.

Problems Running Reports

The topics in this section document problems you may encounter when running reports.

Unable to Select Multiple Report Formats When Running a Report

When running a report with options, you cannot select multiple formats when the delivery option is to view the report.

Before selecting multiple formats on the Run with advanced options page, you must first change the Delivery option to Save the report, print it, or send an email.

Unable to Click Links

Links in Cognos Connection will not work if your browser is not properly configured. Consequently, you cannot perform operations such as running a report or starting Report Studio. For all Web browsers, cookies and JavaScript must be enabled.

For more information, see your browser help.

For Internet Explorer only, the following must be enabled:

- Run ActiveX controls and plug-ins

- Script ActiveX controls marked safe for scripting

- Active scripting

Cognos does not provide or download ActiveX controls as part of Cognos 8. Report Studio uses the native Internet Explorer XML support, which is an integral component of the browser. Because Microsoft implements XML using ActiveX, you must enable ActiveX support for Report Studio.

Steps to Enable Internet Explorer Options

1. In Internet Explorer, from the **Tools** menu, click **Internet Options**.

2. On the **Security** tab, click **Custom Level**.

3. In the **Security Settings** dialog box, scroll to the **Activex controls and plug-ins** settings and enable **Run Activex controls and plug-ins** and **Script Activex controls marked safe for scripting**.

4. Scroll to the **Scripting** settings and enable **Active scripting**.

5. Click **OK.**

Scheduled Reports Fail

You schedule reports that previously ran successfully, but now fail. The following error message appears:

CAM.AAA Error authenticating user

This may happen because a user changed a password. Cognos 8 uses a copy of the user ID and password to run the scheduled report.

The solution is for the user to renew their credentials.

Steps to Renew Credentials

1. Ask the user who scheduled the report to log on to Cognos Connection.

2. In Cognos Connection, click the my area button and click **My Preferences.**

3. On the **Personal** tab, scroll to the **Credentials** section.

4. Click **Renew the credentials.**

   Note that this does not apply to users from a Cognos Series 7 namespace.

A Report Does Not Run as Scheduled

A scheduled report may fail, or an administrator may cancel it.

To view the run history and status of a report you scheduled and to view detailed information about why a scheduled report failed, do the following:

Steps

1. In Cognos Connection, click the my area button, and click **My Activities and Schedules, Schedules.**

2. Click the arrow next to the item to view the Actions menu, and then click **View run history.**

   The **View run history** page appears.

3. To view the run history details, in the **Actions** column, click the view run history details button.

Missing Images in a PDF Report

Images that appear in reports rendered as HTML are missing in reports rendered as PDF. The embedded GIF, JPG, and BMP images do not appear. Only the borders of the missing images appear.

If you use Microsoft Internet Information Services (IIS), go to the properties sheet of the Web site and ensure that the **Enable the HTTP Keep Alives** option is selected.

Ensure that the virtual directory where the images are stored has anonymous access enabled. Open IIS and open the properties sheet for the virtual directory for your images. Select the **Anonymous Access** check box.

Security Problems

The topics in this section document security problems.

Unable to Log On

If Cognos 8 uses an Active Directory Server as the security provider, you may not be able to log on using only your user ID. One of the following errors may appear:

Your password has expired. Please change it.

The provided credentials are invalid.

This problem occurs when the Content Manager service runs under the local system account and runs on a computer that is not part of the Active Directory Server domain.

To log on, you must qualify your user ID using the domain name. For example, when you log on, type

domain\user ID

If you still cannot log on, contact your Cognos 8 security administrator.

Glossary

access permissions

Rules defining the access rights to resources. Access permissions can be granted to any combination of namespaces, groups, or users. Examples of resources are reports and folders.

agent

The object type created and edited by Event Studio. An agent contains the event condition and the associated tasks to perform. Once defined, an agent can be scheduled to check for instances of the event.

analysis

A process where a user interacts with data to gain insight and understanding. In Cognos 8, Analysis Studio is designed to facilitate analysis.

authentication

The process of verifying the identity of users when they log on. Users must be authenticated before they can be authorized to use any secured resources.

burst

To create many report results by running a single report once. For example, you can create a report that shows sales for each employee, and run it once, sending different results to regional managers by bursting on region. You set up bursting in Report Studio and enable it in the portal.

capabilities

Capabilities refer to the ability to use certain functions and features within Cognos 8. The Capabilities tool controls access to secured functions such as Administration and the Cognos Query Studio, and secured features, such as User Defined SQL and Bursting. The permissions define which of the predefined and built-in Cognos groups and roles have access to which secured functions and features, and the type of access. Access to these capabilities is set by the security administrator. Users can see their access permissions in the Personal area of their Preferences, under Capabilities.

contact

A named email address to which reports and agent emails can be sent. Contacts are never authenticated.

content locale

A code that is used to set the language or dialect used for browsers, report text, and so on; and the regional preferences, such as formats for time, date, money, money expressions, and time of day.

For Cognos products, you can specify a locale for the product interface (product locale) and for the data in the report (content locale).

credentials

Information stored about the identity of a Cognos user, usually a user name and password. You can assign your credentials to someone else so that they can use resources that you are authorized to use.

Credentials are created for Cognos components. If a user schedules or programs an action, credentials must be stored in the content store.

drill down

In Cognos Planning, drill down is a technique used to analyze D-Cube data that was imported by a D-Link. You can drill down on any single cell in a D-Cube. If the cell contains data transferred by a D-Link, drill down opens a view of the source data. If the data was imported from another D-Cube, drill down opens the appropriate selection from the source D-Cube. If the data was imported from an external source (a mapped ASCII file or an ODBC database), drill down extracts the relevant data from the source file and displays it in a special drill-down results dialog box.

In Cognos 8 BI, drill down refers to the act of navigating from one level of data to a more detailed level. The levels are set by the structure of the data. See also drill up.

drill up

The act of navigating from one level of data to a less detailed level. The levels are set by the structure of the data.

See also drill down.

event

An exceptional item of data, defined by specifying a query expression against items in a package. When data is detected matching the event condition, it causes an agent to perform tasks.

group

In security, a list of users or other groups that can be used to assign access permissions and capabilities.

Groups can be referenced from third-party authentication sources or can be local to Cognos 8. Local groups are managed from the administration portal. The list of groups that an authentication user is a member of is part of the user's passport for a Cognos 8 session.

In reporting, grouping is the action of organizing common values of query item together and only displaying the value once. Headers and footers often appear after each instance of a common value in a grouped column

job

A group of runnable objects, such as reports, agents, and other jobs that you run and schedule as a batch.

locale

A code that is used to set the language or dialect used for browsers, report text, and so on; and the regional preferences, such as formats for time, date, money, and money expressions.

For Cognos products, you can specify a locale for the product interface (product locale) and for the data in the report (content locale).

metric

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

metric package

A Cognos Connection representation of a Metric Studio application. A metric package contains connection information, reports, and metric management tasks for that application.

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 8 BI, a design model is created and maintained in Framework Manager. The design model or a subset of the design model must be published to the Cognos 8 server as a package for users to create and run reports.

In Cognos Planning, a model is a group of D-Cubes, D-Lists, D-Links, and other objects stored in a library. A model may reside in one or more libraries, with a maximum of two for Contributor.

namespace

For authentication and access control, a configured instance of an authentication provider. Allows access to user and group information.

In XML, a collection of names, identified by a URI reference, which are used in XML documents as element types and attribute names.

In Framework Manager, namespaces uniquely identify query items, query subjects, and so on. You import different databases into separate namespaces to avoid duplicate names.

news item

A single entry in a rich site summary (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.

package

A subset of a model, which can be the whole model, to be made available to the Cognos 8 server.

For Metric Studio users, see metric package.

passport

Session-based information regarding authenticated users. A passport is created the first time a user accesses Cognos 8. It is retained until a session ends, either when the user logs off, or after a specified period of inactivity.

Passport information is stored in Content Manager memory. Credentials are stored encrypted.

A passport is stored in a memory-only browser cookie for the duration of the session.

portlet

A mechanism for displaying Web content as part of a portal page.

product locale

The code or setting that specifies what language, regional settings, or both to use for parts of the product interface, such as menu commands.

publish

In Cognos 8 BI, refers to the creation of a package that makes metadata available to the Cognos 8 server. Information in the package is used to create reports and other content.

In Cognos Planning, refers to a function that is used to copy the data from Contributor or Analyst to a datastore, typically so it can be used for reporting purposes.

report

A set of data deliberately laid out to communicate business information. Depending on the context, "report" may refer to report specification or report output.

Report (more precisely, report specification) is the generic term for the objects created or edited by Query Studio, Report Studio, and Analysis Studio.

report output

Report output combines data at the point in time when the report was run with a report specification. It is a document that can be displayed, printed, or emailed. Cognos 8 can produce report outputs in HTML, PDF, Excel, or CSV formats.

report specification

The definition of queries, prompts, layouts, and styles that make up a report. A report specification is combined with data by a run operation to create report outputs. You create report specifications by using Report Studio, Query Studio, Analysis Studio, or through the Software Development Kit.

report view

A reference to another report that has its own properties, such as prompt values, schedules, and results.

You use report views to share a report specification instead of making copies of it.

rich site summary

(RSS) An industry standard format for displaying transient data, such as breaking news, in a web page or standalone viewer. Cognos Connection includes a portlet type for displaying RSS format data. This can be used to display data from a public RSS service or to display news items generated by agents detecting events. A synonym for Really Simple Syndication.

session

The time during which an authenticated user is logged on to Cognos 8.

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.

user

A person accessing a Cognos 8 application. Authenticated user definitions and information, such as passwords and IDs, are maintained in third-party authentication sources.

Other user information, such as the location of personal folders or preferred formats for viewing reports, is stored in Cognos 8.

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

(WSRP) A standard for creating presentation-oriented Web services so that they can be easily integrated within other applications, such as Web portals.

Glossary

Index

Index

Index

G

Global Customer Services Web site, 9
global filters
    Cognos Viewer portlet, 62
    drill-through reports, 13
    drill-up and drill-down actions, 13
    pages and dashboards, 60
    prompts, 13
Go To page
    more information, 15
granting access, 45
groups
    definition, 128

H

help
    getting, 9
home pages
    setting, 57
HTML formatting
    reports, 76

I

icons
    specifying alternative for entry, 35
images
    missing in PDF report, 124
information
    finding, 9
interactivity in pages and dashboards, 60

J

jobs, 13
    definition, 128
    delivery options, 27
    properties, 27
    rerunning failed, 121
    scheduling, 109
    steps, 109
    submission of steps, 27

L

languages
    choosing for reports, 78
    defaults for reports, 80

    SAP BW data sources, 79
links
    entries, 33
    unable to click, 123
locales
    definition, 128
logging off, 19
logging on, 19
    multiple namespaces, 46

M

metadata, 23
Metric History Chart, 14
Metric List, 14
metric packages
    definition, 129
metrics
    definition, 129
Metric Studio
    portlets, 14
Microsoft Excel 2007
    support, 14
Microsoft Office documents
    downloading, 105
    downloading from Cognos 8, 105
models, 23
    definition, 129
moving
    entries, 31
Multi-page portlet, 13
    creating dashboards, 57
multiple formats
    unable to select, 123
multiple values
    drill-through, 12
My Folders, *See* folders

N

namespaces
    definition, 129
    multiple namespaces, 46
news item headlines
    receiving, 101
news items
    definition, 129

Index

Index