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Tip or Technique

Dynamic Dashboards with Burst Reports in Cognos 8.3

Product(s): Cognos 8.3

Area of Interest: Reporting

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Contents

1   Introduction

1.1   Purpose

This document is designed to show the dynamic dashboard capabilities of some of the portlets in Cognos 8.3. The technique will outline the steps needed to create burst reports and portal pages that will ensure inter portlet communication.

The portlet filtering will use the saved output of bursted reports.

1.2   Applicability

The information in the document was validated using Cognos 8.3 build 81 20-0.

1.3   Exclusions and Exceptions

There are other methods of implementation for Cognos 8.3 portlets. These are not discussed in this document.

2   Steps to Create a Dynamic Dashboard

2.1   Create Simple List Report

In this task a list report will be created that will use to examine the behaviors of Global Filtering on a bursted report.

1) Create a folder called Global Filter under the Go Sales (query) and then navigate inside the previously created folder.
2) Start Report Studio then select the Go Sales (query) package.
3) Click Create a New Report or Template and then double-click the List icon.
4) Create a new list report with the following items from the Product forecast (query) namespace:
   a. \Branch\Country
   b. \Product forecast\Sales year
   c. \Product forecast\Sales month
   d. \Product forecast\Expected volume
5) Select the Country column and click the Group / Ungroup button ▊ on the toolbar to group the Country column. When completed the list report should resemble the following:

Country	Sales year	Sales month	Expected volume
<▊Country>	<Sales year>	<Sales month>	<Expected volume>
<Country>	<Sales year>	<Sales month>	<Expected volume>

This simple list report now must be configured to be a bursted report.

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6) From the File menu select Burst Options ...

7) Under Burst Groups set

   Query: Query1

   Label: Country

8) To add the column to the Groups, click the pencil icon

9) On the Grouping & Sorting dialog box drag the Country query item to the Groups folder in the right hand pane; click OK to close the dialog box
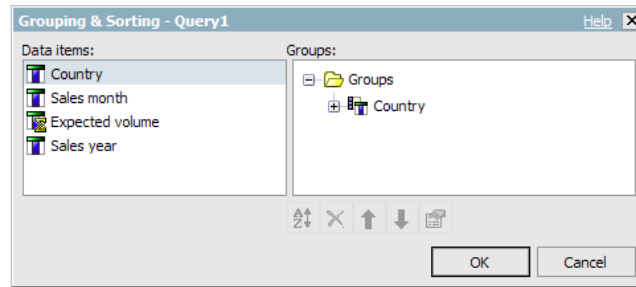
10) Under Burst Recipient set

    Query: Query1

    Data Item: Country

    Type: Automatic

11) To set Master detail relationships click the ellipses (...) to invoke the Master Detail Relationships dialog box.

12) In the Master Detail Relationships dialog box, click the New Link button to join Country of Master Query1 to Country of Detail Query1; click OK to close the dialog box.
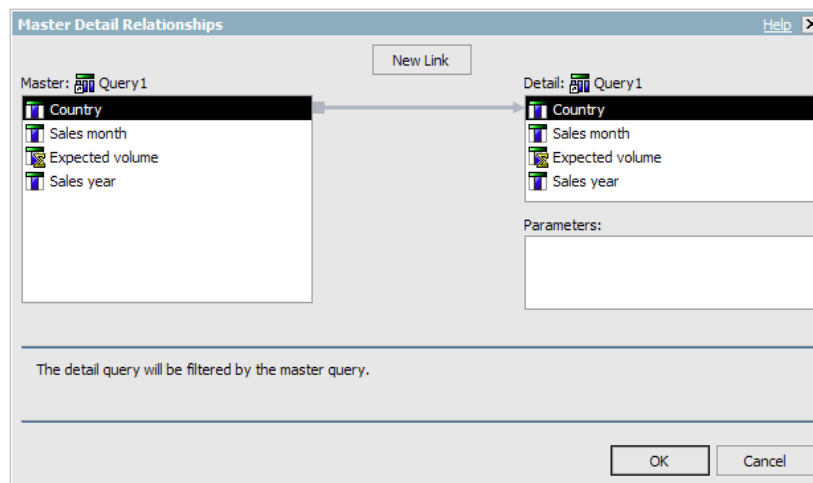
13) The completed burst setting should resemble the following image.
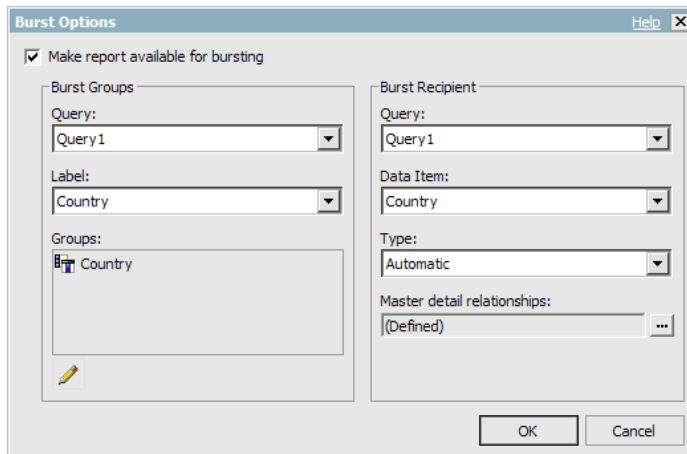
14) Click OK to save the burst settings
15) Save the report as Country Burst in the folder Public Folders > Go Sales (query) > Global Filters
16) Close or minimize Report Studio.

2.2   Creating a Prompt Report

The following section will create a report which will contain a single prompt. Although multiple prompts can be added, a single prompt is sufficient to demonstrate the Global Filtering technique. This report will provide the mechanism that drives the prompts in the previously created list report.

1) Create a new report and use the Blank template.
2) From the Insertable Objects click on Toolbox tab.
3) Insert Value Prompt [▢▾ Value Prompt] inside the Report Page, and NOT the prompt page.

Create a new Parameter named pCountry, and click Next.

4) On the Create Filter wizard page, uncheck the box Create a parameterized checkbox and click Next to continue.

5) Within the Prompt Wizard – On the Populate control, click the ellipsis beside "Value to use:" field. From the Product forecast (query) namespace select \Branch\Country and click OK.

6) Click Finish to complete the prompt creation.
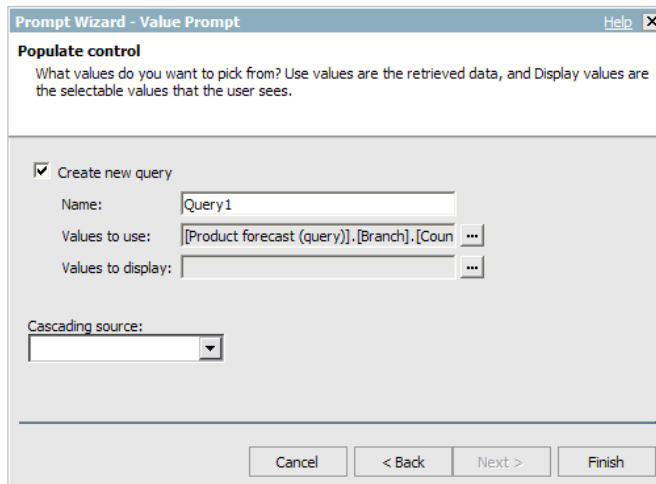
2.2.1 Setting Sorting and Default Values on the Prompt

7) Highlight the Value Prompt on the page. Within the General section of the Properties Pane located on the bottom left of the window, select Auto-Submit and change the value from No to Yes.

8) From the Properties pane under the Data section, locate the Sorting property, and then click the ellipsis to change the value.

9) From the Data Items window, drag Country to the sort list window, and the click OK to close the dialog box.
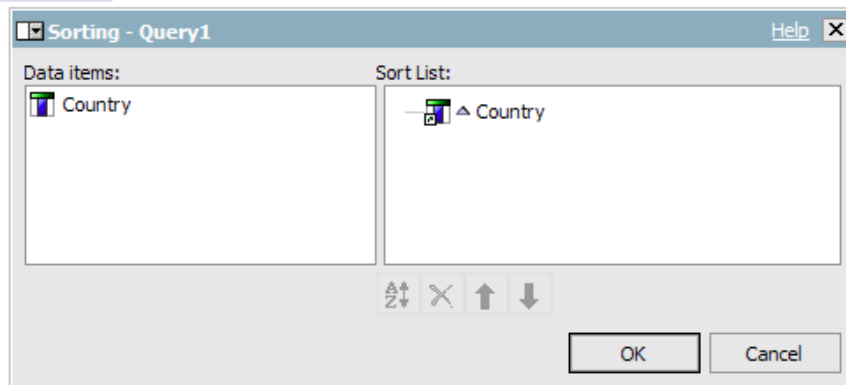
10) To add a default value of Canada for the prompt; highlight the Value Prompt on the page. In the Properties pane select Default Selections and click the ellipses. This will invoke the Default Selection dialog box
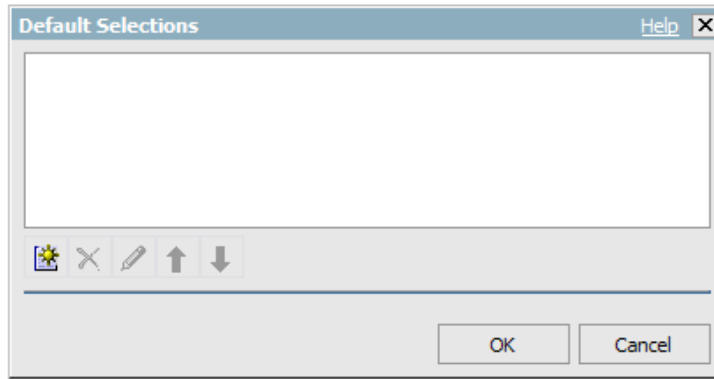
11) Click the Add button to add a new Default Selection; type Canada in the Add field.
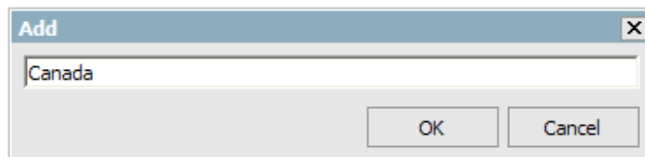
12) Click OK twice to close the Add and the Default Selections dialog boxes.

The following is a review of the Properties for the Value Prompt.

Properties - ▲ Value Prompt	
⊟ **Conditional**	
Conditional Styles	
Style Variable	
Render Variable	
⊟ **Data**	
Sorting	(Defined)
Data Format	
Query	Query1
Use Value	Country
Display Value	Country
Static Choices	
Rows Per Page	5000
Properties	
⊟ **General**	
Required	Yes
Multi-Select	No
Select UI	List box
Auto-Submit	Yes
Cascade Source	
Pre-populate	No
Hide Adornments	No
Range	No
Parameter	pCountry
Default Selections	(Defined)

13) Run the Report to ensure the report executes correctly. Close Cognos Viewer when done.

14) Save the report as Country Prompt Burst in the folder Public Folders > Go Sales (query) > Global Filters

15) Close or minimize Report Studio.

2.3   Executing the burst report

The following section will provide the steps to setup and execute the Country Burst report. This will ensure that when the portlet passes values from one portlet to another portlet the bursted output will exist.

1) From Cognos Connection, Navigate to the folder Public Folders > Go Sales (query) > Global Filter.
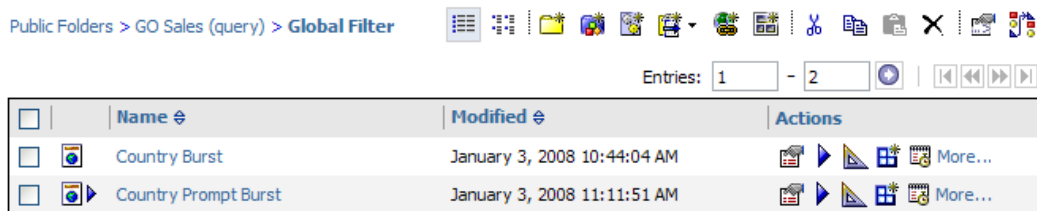
2) Click the Run with options button ▶ for the Country Burst.
3) On the Run with options page set the Delivery to Save the report

4) On the same page click the advance options link
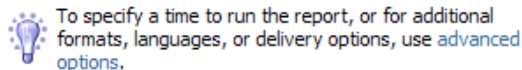
5) On the Run with advanced options page, set the Burst option

6) Click the Run button to execute the report
7) Click OK on at the bottom of the Summary Page. This should produce output for each country.

2.4   Creating the Portal Page

The following section will provide the steps to create a portal page containing three Cognos Viewer portlets. The Cognos Viewer portlet will be used to display the reports created in the previous steps.

1) From Cognos Connection, Navigate to the folder Public Folders > Go Sales (query) > Global Filter.
2) Create a new page using the New Page button.
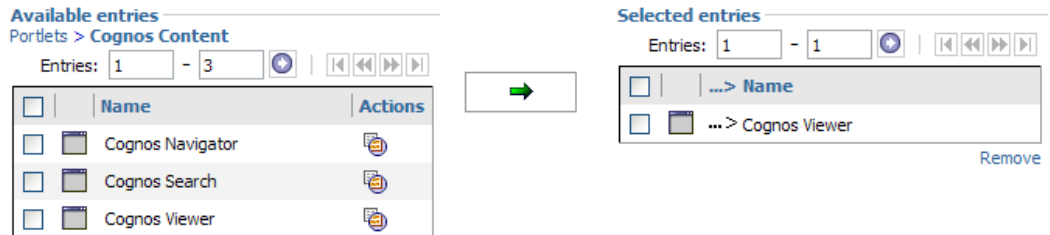
3) Name the page Global Burst Filtering and then click Next.
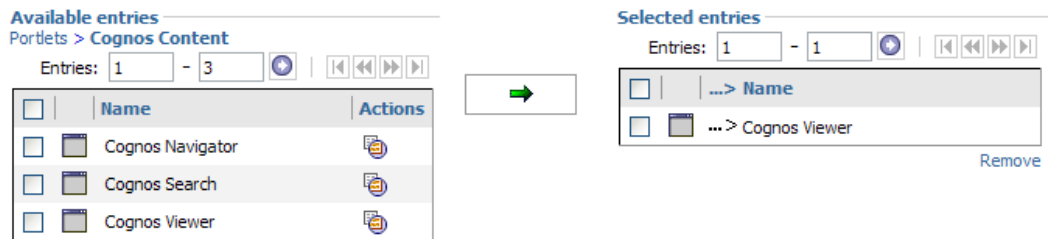
4) Select two columns for the dashboard layout
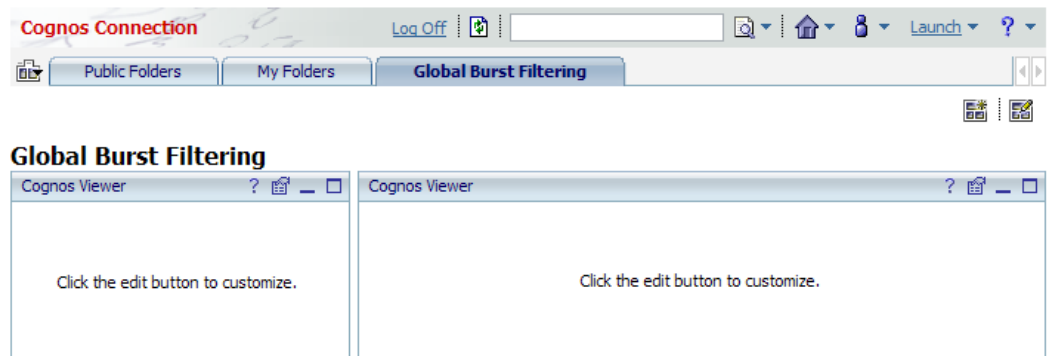
Number of columns:

○ ▢   ◉ ▥   ○ ▥▥

5) Leave the column widths the default value of 50%

6) Click Add... link below the left column to add a new portlet.

7) Click Cognos Content to expose the Cognos Content portlets.

Check the box to select the Cognos Viewer portlet and then click the right arrow to include the portlet in the Selected entries. Click OK when done.

Available entries
Portlets > Cognos Content
Entries: 1 – 3

	Name	Actions
☐	Cognos Navigator	
☐	Cognos Search	
☐	Cognos Viewer	

→

Selected entries
Entries: 1 – 1

	...> Name
☐	...> Cognos Viewer

Remove

8) On Set columns and layout page, click Add... link below the right column.

9) Click Cognos Content to expose the Cognos Content portlets.

10) Check the box to select the Cognos Viewer portlet and then click the right arrow to include the portlet in the Selected entries box. Click OK when done

Available entries
Portlets > Cognos Content
Entries: 1 – 3

	Name	Actions
☐	Cognos Navigator	
☐	Cognos Search	
☐	Cognos Viewer	

→

Selected entries
Entries: 1 – 1

	...> Name
☐	...> Cognos Viewer

Remove

11) On Set column and layout page, click Next to go to the next page.

12) Type Global Burst Filtering for the title, and then click Next to go to the next page.

13) Check both boxes, Add page to portal and View page, then click Finish. The completed page should resemble the following image.

Cognos Connection   Log Off   Launch ▾ ? ▾

Public Folders | My Folders | **Global Burst Filtering**

Global Burst Filtering

Cognos Viewer ? ⌂ _ □	Cognos Viewer ? ⌂ _ □
Click the edit button to customize.	Click the edit button to customize.

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2.4.1   Adding the Prompt Report to the Viewer and Setting the Filtering Properties

The following section will provide the steps to add the Prompt report to the Cognos Viewer portlet. It will also demonstrate the appropriate settings required for inter portlet communication.

1) Click the properties icon 🖼 of the left portlet to edit the portlet properties.
2) Click Select an entry to select the report you wish to include inside the portlet.
3) Navigate to Public Folders > Go Sales (query) > Global Filter and select Country Prompt Burst report.

Entry:
None
Select an entry...

4) In the Property window, under the Entry section, click Edit properties to open the Advanced Properties Editor to change the Portlet communication options between the portlets.

Entry:
📄 Public Folders > GO Sales (query) > Global Filter > Country Prompt Burst Edit Properties
Select an entry...   Clear

5) Set the Fragmentation Action to Run the report.
6) Under the Portlet communication options, set the Prompt values to box Communicate with other portlets and select Portlets using a channel. Enter BurstChannel as the name.

Fragment Action:
⚪ Show a run action
⚪ Run the report
🔘 Show most recent saved output

   When there is no saved output:
   [Run the report ▾]

Prompt the user:
[Only when required parameter values are missing ▾]

Portlet communication options
Specify the communcation with other portlets. Communication can be global or limited to specific portlets using channels.

Prompt values:
☑ Communicate with other portlets
   ⚪ Portlets not using a channel
   🔘 Portlets using channel:
      [BurstChannel]

7) Click OK when done to return the Set the property page.

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8) Click OK to close the Set the Property page. You will return to the portal page.

2.4.2   Adding the List Report to the Viewer and Setting the Filtering

The following section will add the Country Burst report to the Cognos Viewer portlet. It will also provide the steps to set the appropriate properties to allow portlet communication for filtering and selected the bursted output.

1) Click the properties icon of the top right portlet to edit the portlet properties.

2) Click Select an entry to select the report you wish to include inside the portlet.

3) Navigate to Public Folders > Go Sales (query) > Global Filtering and select Country Burst report.

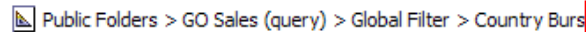**Entry:**
None
Select an entry...

4) In the Property window, under the Entry section, click Edit properties to open the Advanced Properties Editor to change the Portlet communication options between the portlets.

Entry:
Public Folders > GO Sales (query) > Global Filter > Country Burst Edit Properties
Select an entry...   Clear

5) Set the **Fragmentation Action** to Run the report.

6) Under the Portlet communication options, set the Prompt values to box Communicate with other portlets and select Portlets using a channel. Enter BurstChannel as the name.

Fragment Action:

○ Show a run action

○ Run the report

⦿ Show most recent saved output

    When there is no saved output:

    [Run the report   ▼]

Prompt the user:

[Only when required parameter values are missing   ▼]

Portlet communication options
Specify the communcation with other portlets. Communication can be global or limited to specific portlets using channels.

Prompt values:

☑ Communicate with other portlets

    ○ Portlets not using a channel

    ⦿ Portlets using channel:

       [BurstChannel]

7) Click OK when done to return the Set the property page

8) Click OK to close the Set the Property page and return to the portal page.

2.5   Testing the Page

2.5.1   Testing the Prompting Mechanism

Click Mexico in the prompt list box on the Country Burst Prompt portlet. The value will be passed to the other portlet and Country Bursted report with the filter of Mexico will be selected.

Global Burst Filtering

Country Prompt Burst				Country Burst				

Country Prompt Burst list: Italy, Japan, Korea, **Mexico**, Netherlands, Singapore, Spain, Sweden, Switzerland, United Kingdom, United States

Country	Sales year	Sales month	Expected volume
Mexico	2007	2	68,865
	2007	5	67,735
	2007	3	71,185
	2007	6	62,955
	2007	7	69,675
	2007	1	56,465
	2007	4	68,365

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