

IBM Cognos Analytics
Version 12.0.x

Dashboards and Stories User Guide



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Chapter 1. Getting started in IBM Cognos Analytics - Dashboards and Stories

IBM® Cognos® Analytics provides dashboards and stories to communicate your insights and analysis. You can assemble a view that contains visualizations such as a graph, chart, plot, table, map, or any other visual representation of data.

Creating a dashboard or story

If you're new to dashboards and stories, review the following steps to understand the general workflow to create a view.

1. Click the **Open menu** icon  , and then click **+ New**.
2. Click **Dashboard** or click **Story**.
3. Select a template. Cognos Analytics provides templates that contain predefined layouts and grid lines to help with arrangement and alignment of the visualizations in a view.
4. Add visualizations to your view in one or more of the following ways:
 - If you know the data that you want to see, but are not sure about how to present it, click **Select a source** to add data to the **Selected sources** pane. Then, drag columns onto the canvas. Cognos Analytics displays them in the appropriate visualization.
 - If you know the type of visualization you want to use, select the visualization type and then add columns to it.
 - Drag your collected visualizations from the My pins pane to quickly build a dashboard or story.
5. Limit the data that is displayed by filtering in one or more of the following ways:
 - You can filter individual visualizations or on all visualizations in the view.
 - You can even filter on a column that is not displayed in the visualization by using a context filter.
 - You can select a specific value or a range of values.
6. Enhance your view and draw attention to visualizations by adding text, images, media, and web pages.
7. Personalize your view by changing the theme. You can choose a light or dark theme. You can also customize specific visualization properties such as fill and border color, and opacity.
8. Create more meaningful or complex visualizations by adding columns to an existing visualization. Drag another column onto a visualization and it changes to match the new data added.
9. You can undo and redo your last actions in succession. The ability to undo and redo previous actions is available until you close the view.
10. Test the view.

Chapter 2. Dashboards

Analyze powerful visualizations of your data in IBM Cognos Analytics and discover patterns and relationships that impact your business. Then, communicate the insights that you discovered in a dashboard and share it with others.

Cognos Analytics dashboards: a tutorial

IBM Cognos Analytics integrates reporting, modeling, analysis, exploration, dashboards, stories, and event management so you can understand your organization's data, and make effective business decisions.

This tutorial shows you the basics of creating a dashboard.

Scenario for the tutorial

In this tutorial, you're a Human Resources manager who was given a large project – you are leading a new training initiative for your entire global company. You know how the training budget is spent in your area of the company, however you want to better understand where this money is invested in all areas of the company.

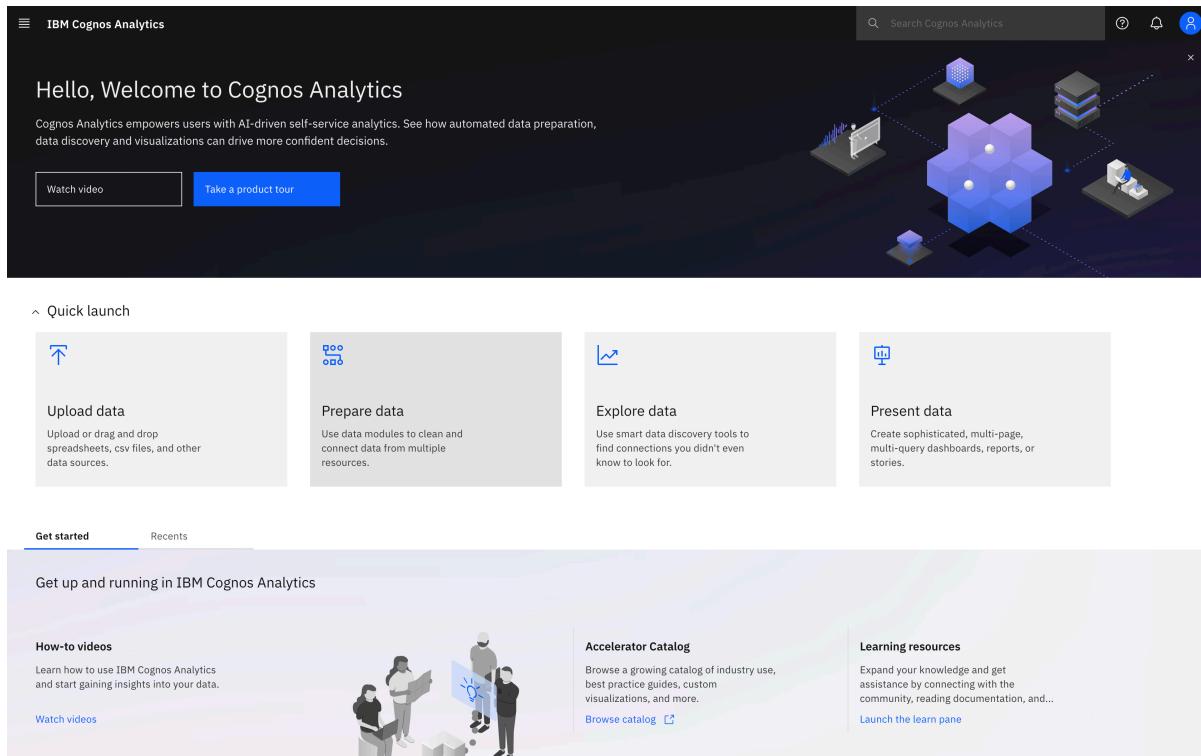
Uploading data

Let's start by getting data for the tutorial.

Procedure

1. Go to [the IBM_HR_Training_2014-17.csv](#).
(https://www.ibm.com/support/knowledgecenter/SSEP7J_11.2.0/com.ibm.swg.ba.cognos.ug_ca_dshb.doc/IBM_HR_Training_2014-17.csv)
2. Depending on your browser, you might be asked what you want to do with it. Click **Save**.
3. From the **Quick launch** on the welcome page, click **Upload data**.

You can also click the **Open menu** icon , and then click **Upload data** .



4. Go to where you saved `IBM_HR_Training_2014-17.csv` and select it.

The data asset appears in the **My content** folder.

Note: You can refine the data by filtering it or changing the properties. However, we won't refine it in this tutorial.

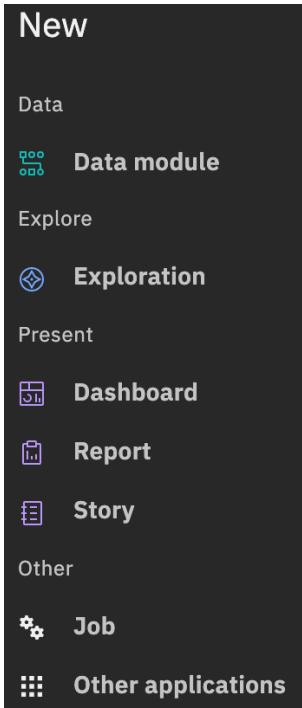
5. Click **Open**.

Creating a dashboard

You can explore your data and easily communicate the analysis and insights that you discover.

Procedure

1. Click the **Open menu** icon , and then click **+ New**.
2. Click **Dashboard**.



3. You see predefined templates that contain grid lines for easy arrangement and alignment of visualizations and other elements in a dashboard.

Select the template with four panes and then click **Create**.

4. Let's add a data asset to this dashboard so that we can explore its data.

a) In the **Selected sources** pane, click the **Select a source** icon.



b) Go to the **My content** folder and select "IBM_HR_Training_2014-17.csv". Click **Add**.

5. Let's explore the data by adding a visualization to the dashboard.

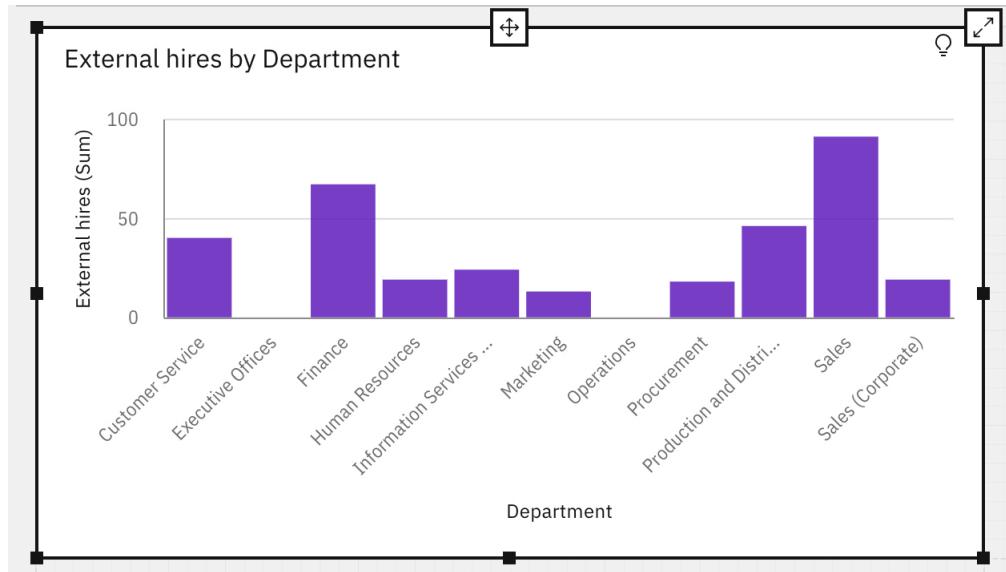
- a) Drag "Department" to the top left pane and drop it on the square that appears in the pane.



You now see a list of departments.

A screenshot of the Cognos Analytics interface showing a list of department names on a dashboard tab. The list includes Customer Service, Executive Offices, Finance, Human Resources, Information Services and Technology, Marketing, Operations, Procurement, and Production and Distribution. The interface shows the sidebar with data sources and fields, and the top navigation bar with various icons.

- b) Drag "External hires" to the canvas and drop it on the "Department" list. In the column visualization, you see that the Sales departments hire the most external people followed by the Finance departments.



6. Let's change the visualization type.

- a) Click white space, in the column visualization, away from the visualization title. A toolbar appears.



- b) Click the **Change visualization** icon in the toolbar.



- c) Scroll to and click the **Packed bubble** icon.



7. Let's add a second visualization, using a different way to create a visualization.

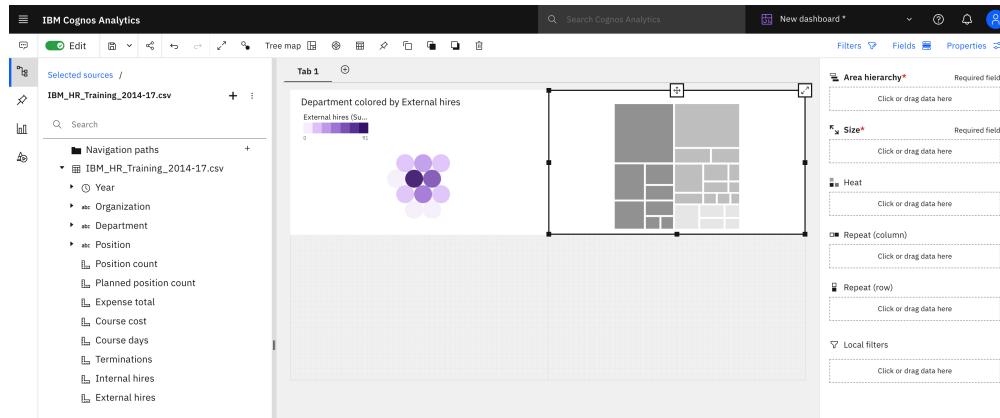
- a) Click the **Visualizations** icon.



- b) Click the **Tree map** icon.



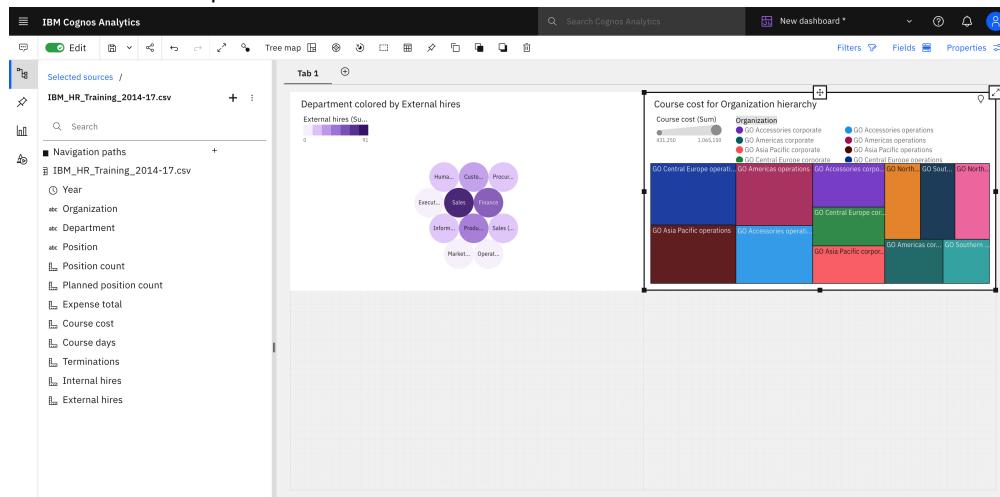
An empty tree map is created with empty data fields on the side, indicating where you need to add data.



- c) From the **Selected sources** pane, drag "Organization" to the **Area hierarchy** field.

- d) Drag "Course cost" to the **Size** field.

- e) Close the **Fields** pane for more room for the visualizations.



8. Let's hide the legend to have more room for the tree map.

- a) Select the tree map visualization.

- b) Click the **Properties** icon.



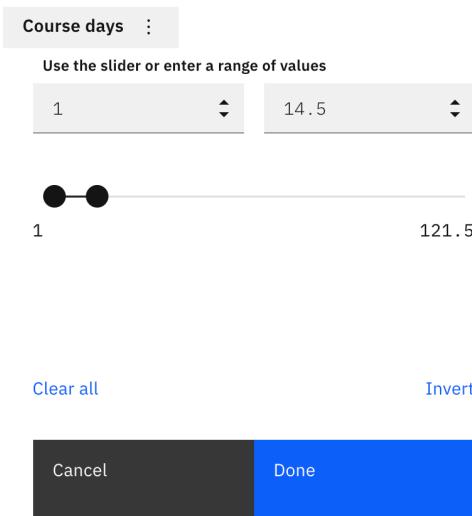
- c) Click **Legend** and deselect the **Show legend** toggle.

Take a look at the visualization. The size of each box in the tree map tells you the amount of training that is spent by each organization.

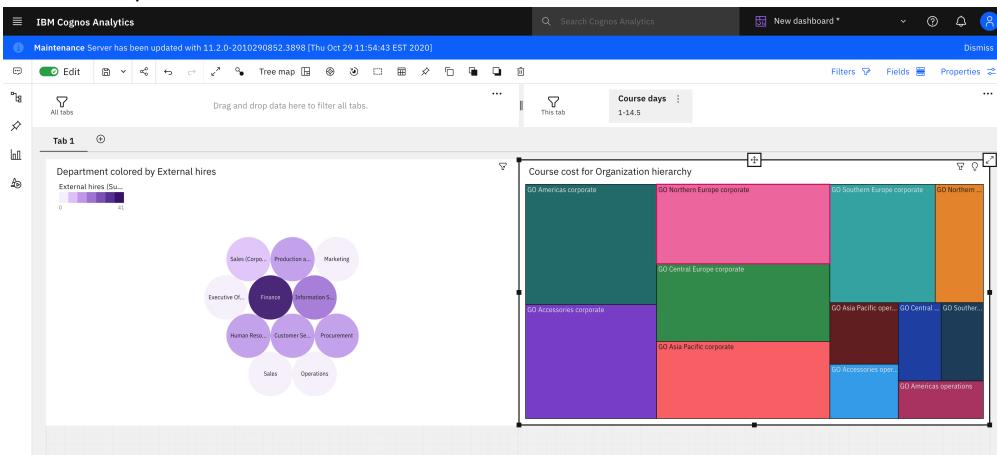
Note: You have two more panes where you can create more visualizations or add widgets such as text or shapes.

9. Let's add a filter to see the impact of the duration of courses on the visualizations.

- Click the **Filters** tab to open the **All tabs** and **This tab** filters.
- From the **Selected sources** pane, drag "Course days" to the **This tab** filter area.
- To define the filter, click **Course days** in the filter area.

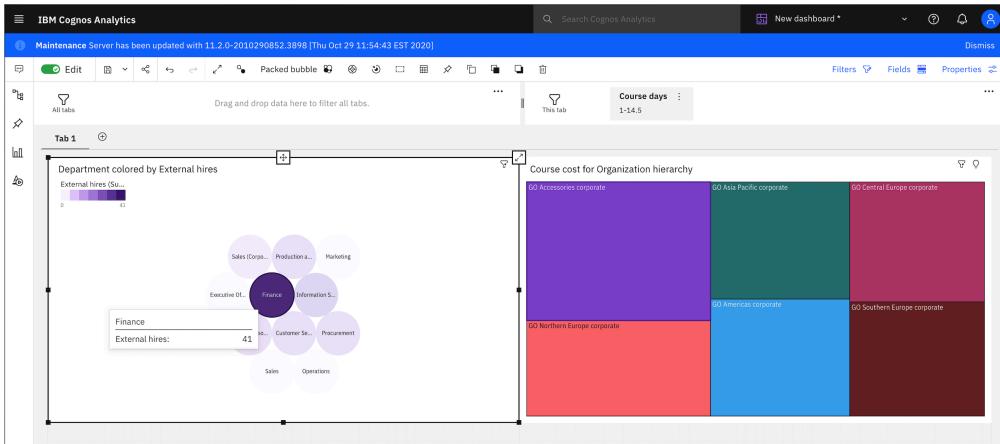


- Move the slider to show courses with a shorter duration, or type a new end point. We picked 14.5 as the end point but feel free to select a different one. Click **Done**.

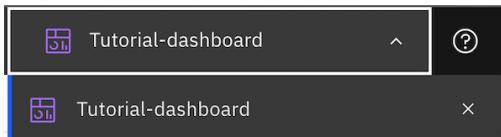


10. Another way to filter data is to select one or more data points in a visualization and see the impact on the other visualizations. Click "Finance" in the packed bubble visualization.

Take a look at the tree map visualization. It doesn't contain the Department column so it is filtered by the Finance department.



11. Save the dashboard and then use the switcher in the app bar to close it.



What's next in Cognos Analytics?

Let's recap: you learned how to upload data, you created visualizations that showed you new insights about your data, and you filtered data in several different ways. Now you can start exploring your own data.

What else can you do with the dashboard?

You can enhance the dashboard that you created. Here are a few ideas:

- Use text widgets to annotate the dashboard with descriptions.
- Provide more information by adding media and links to web pages.
- Format the dashboard, such as changing the colors or theme.
- Add images and shapes to add visual appeal.
- Create a story in your dashboard. A story consists of visualizations and an over-time narrative.
- Open a dashboard visualization in Explore to get advanced analytic insights and see relationships in your data.

Wait, there's more!

There is much more you can do in Cognos Analytics:

- Build sophisticated, multi-page, multi-query reports against multiple databases.
- Use data modeling to access and shape data from data servers or uploaded files.
- Schedule activities.
- Manage content and manage the account.
- And more!

If you want to learn more about how to use Cognos Analytics, click and ask a question.

Have fun!

Generating a dashboard automatically

The Cognos Analytics AI features allow users to automatically generate dashboards. The users only need to select the data source.

The automatic dashboards can be used for learning purposes, as a proof of concept, or as a starting point when trying to create a dashboard.

You can generate automatic dashboards in the following way:

- By using the **Create dashboard** and **Create dashboard from the chart** commands in the Assistant.

For more information, see the "Creating a dashboard in the Assistant" and "Creating a dashboard from a visualization in the Assistant" topics in the *IBM Cognos Analytics Explore Guide*.

- From the **Upload and create** and **Create from existing data** quick launch tiles in the Cognos Analytics welcome page.

For more information, see the "Welcome page" topic in the *IBM Cognos Analytics Getting Started Guide*.

If an automatic dashboard cannot be generated from the selected source, you might need to select a different source or create a different type of asset.

Creating a dashboard

A dashboard helps you to monitor events or activities at a glance by providing key insights and analysis about your data on one or more pages or screens.

Procedure

1. Click the **Open menu** icon , and then click **+ New**.
2. Click **Dashboard**.
3. Select a template to use and click **Create**.

Predefined templates contain grid lines for easy arrangement and alignment of visualizations and other elements. For example, you can create an infographic to convey information with pictures on one page that you scroll through.

Templates

IBM Cognos Analytics provides templates that contain predefined designs and grid lines for easy arrangement and alignment of the visualizations.

When you create a new dashboard, choose a tabbed template to create a dashboard with multiple tabs or choose an infographic for a long, scrollable dashboard. You can also hide tabs on a tabbed dashboard if you want just one tab and less clutter on the screen.

Hiding the tab button

If your dashboard has only one tab, you might find the single tab button to be unnecessary when you switch to preview mode. You can hide the tab button to create more space on the screen.

Procedure

1. Open a tabbed dashboard that has only one tab.
2. On the app bar, click the **Properties** icon .
3. Click **Tabs**.
4. Click the **Show tabs in preview** toggle to hide the tab button.

5. Click the **Edit** icon  to see preview mode with the tab hidden.

Setting up the page in a dashboard

You can set up your dashboard to create the layout you need for your business purposes.

About this task

You can set whether the layout positioning is relative or absolute.

When you choose a layout style, consider the screen size of the device that is used to view the dashboard.

You can define the page size or select the page size from a number of presets.

If you choose absolute layout positioning, the objects retain their size and position, regardless of the screen size of the device that they are being viewed in. For small screen sizes, absolute positioning can increase the need for scrolling because objects are larger than the screen. Absolute positioning results in one large area that is not divided into sections. Choose absolute if you want visualizations to appear exactly as you size and place them, regardless of the screen size of the device that they are viewed in.

The option **Fit page** resets the view of the dashboard to fit your screen. When you select absolute layout positioning, then the option **Fit page** is not available.

If you choose relative layout positioning, the objects adjust their size and position, relative to each other, the data they show, and the screen size of the device that they are viewed in. Select relative layout positioning if you want the size and position of visualizations to adjust to fit into the screen size of the device that they are viewed in. The appearance of the dashboard can change depending on the size of the screen that it is viewed in.

Procedure

1. Open a dashboard.
2. On the app bar, click the **Properties** icon .
3. If you don't see the **Properties** icon, click the **Edit** icon .
4. Under **Canvas**, select a relative or absolute layout positioning.
5. Under **Page size**, select the page size from the **Preset** menu or specify the width and height yourself. Optionally select the **Fit page** option.

Setting the default zoom level

You can specify a default zoom level for viewing the dashboard canvas.

About this task

When you open a dashboard in **View** mode, you can use the **Zoom** icon  in the toolbar to specify a zoom level when viewing the dashboard canvas.

The default zoom level is 100%, but you can change this in the dashboard properties. The zoom controls are available only on dashboards with the **Layout positioning** field set to **Absolute**.

Procedure

1. Open a dashboard and click the canvas background.
2. On the app bar, click the **Properties** icon .
3. If you don't see the **Properties** icon, click the **Edit** icon .
4. Under **Canvas**, select **Absolute** from the **Layout positioning** field.

4. Under **Page zoom (Absolute layout only)**, select the default zoom level for the dashboard.

Specify one of the following default zoom levels for the dashboard:

- **Fit to width**: Resets the view of the dashboard to fit the width of your canvas.
- **Fit to page**: Resets the view of the dashboard to fit the entire canvas.
- Percentage: 200%, 150%, 100%, 75%, or 50% of the actual size of the dashboard.



Dashboard properties

^ Canvas

Layout positioning

Absolute ▾

Page zoom (Absolute layout only)

Default zoom value

100% ▾

Page size

Preset

Screen 16:9 ▾

Fit page



Width

Height

1280 px

720 px

Grid

Show grid



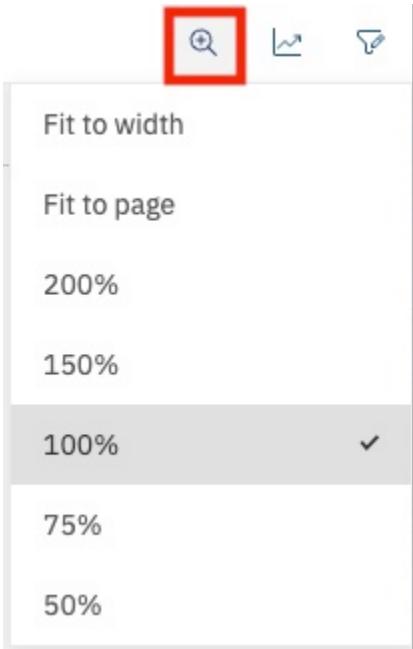
Snap to grid



What to do next

When the dashboard is in **View** mode, use the **Zoom** icon in the toolbar to change the zoom level for the dashboard canvas:





For more information, see "Specify the zoom level of the canvas" in the *IBM Cognos Analytics Dashboards and Stories User Guide*.

Changing the template on a tabbed dashboard

You can change the template while you're assembling a tabbed dashboard. After you change the template, move the objects around to fit.

Before you begin

If there are no tabs on your dashboard, open the dashboard properties, expand the **Tabs** menu, and click **Show tabs**.

Procedure

1. On a dashboard, select a tab and then click the selected tab.
2. Click **Change template**.
3. Select a template.

Creating a custom template

Create custom templates to use to quickly create new dashboards.

About this task

You can create templates that have color palettes and styles that match your company branding and standards. Complete the following steps to create a custom template.

Procedure

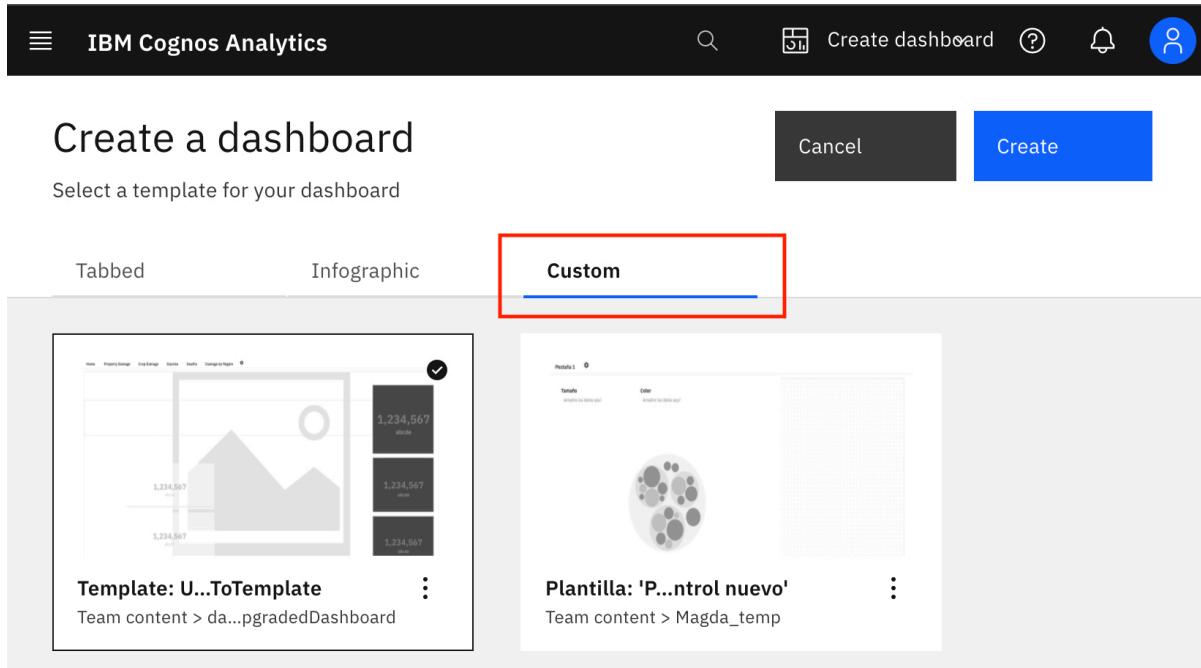
1. Open a dashboard or create a new dashboard.
2. Click the down arrow beside the **Save** icon .
3. Select **Save as a template**.
4. Type a name for the custom template.
5. Select a folder location to save the template, and click **Save**.

Opening a custom template

After you create a custom template, you can open the custom template to create a new dashboard.

Procedure

1. Click the **Open menu** icon , and then click **+ New**.
2. Click **Dashboard**.
3. From the **Create a dashboard** page, click **Custom**.



4. Select a thumbnail from the **Custom template** list.
5. Click **Create**.
A new dashboard opens with chart types, colors, placement, and other formatting.
6. Select a data source and build your dashboard.

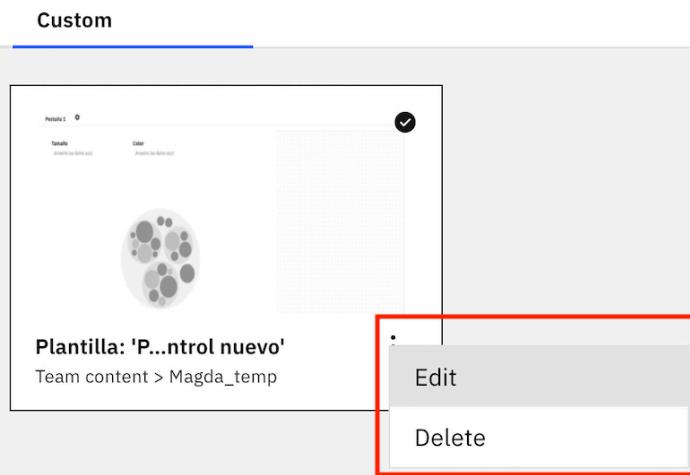
Editing or deleting a custom template

You can edit or delete your custom templates.

Procedure

1. Click the **Open menu** icon , and then click **+ New**.
2. Click **Dashboard**.
3. From the **Create a dashboard** page, click **Custom**.

4. Click the **More** menu on a custom template thumbnail and click **Edit** or **Delete**.



Customizing tabs

Customize tab styling for individual tabs or for all the tabs in your dashboard. You can move the tabs to the top, left, bottom, or right of your dashboard and you can add icons to your tabs.

Customizing tab styling for individual tabs

For individual tabs on your dashboard, you can change the tab title color, the bar under the title that indicates which tab is selected, and the tab fill color.

Procedure

1. Open a dashboard that has at least one tab.
2. On the app bar, click the **Properties** icon.



If you don't see the **Properties** icon, click the **Edit** icon.



3. Click **Tabs**.
4. Under **Individual tab styling**, select the tab that you want to customize.
5. Select a color for the tab title.
6. Select a color for the bar under the tab title that indicates which tab is selected.
7. Select a fill color for this tab.

Tip: You can also click **Select custom color** to open the color picker instead of choosing from the default color options.

Customizing tab styling for all tabs

At a global level for all tabs on your dashboard, you can change the tab title color, the bar under the title that indicates which tab is selected, and the tab fill color.

Procedure

1. Open a dashboard that has at least one tab.
2. On the app bar, click the **Properties** icon.



If you don't see the **Properties** icon, click the **Edit** icon.



3. Click **Tabs**.
4. Under **Master tab styling**, select a color for tab titles.
5. Select a color for the bar under the tab title that indicates which tab is selected.
6. Select a fill color for the tabs.

Tip: You can also click **Select custom color** to open the color picker instead of choosing from the default color options.

Changing tab position

You can move the tabs to be displayed on the top, left, bottom, or right of your dashboard.

Procedure

1. Open a dashboard that has at least one tab.
2. On the app bar, click the **Properties** icon.



If you don't see the **Properties** icon, click the **Edit** icon.



3. Click **Tabs**.
4. From **Tab position**, select **Top**, **Left**, **Bottom**, or **Right**.

Adding icons to tabs

You can add icons to your tabs and control the placement and color of the icons.

Procedure

1. Open a dashboard that has at least one tab.
2. On the app bar, click the **Properties** icon.



If you don't see the **Properties** icon, click the **Edit** icon.



3. Click **Tabs**.
4. Under **Individual tab styling**, select the tab that you want to add an icon to.
5. Under **Visual**, select an icon.
6. Select a color for the icon.
7. Click **Back** on the properties pane.
8. Under **Tabs**, select the position of the icon on the tab, relative to the title, for example, **Right of title**.

Snapping objects to a grid and to each other

You can display a grid on your dashboard or story to help you place objects exactly where you want them. You can snap objects to the grid and snap objects to each other.

Procedure

1. On the app bar, click the **Properties** icon.
2. If you don't see the **Properties** icon, click the **Edit** icon.
3. For the entire dashboard or story, ensure that nothing else has focus by clicking the background, away from any visualization or object.
4. On the **General** tab, open **Canvas**.
5. In the **Grid** section, complete one or more of the following actions:

| Goal | Action |
|--|---|
| Show or hide the grid on the canvas | Set the Show grid option to on or off. This option is on by default for dashboards that are created in the current release. |
| Snap objects to the grid on the canvas | Set the Snap to grid option to on or off. This option is on by default for dashboards that are created in the current release. |
| Snap objects to each other | Set the Snap to objects option to on or off. This option is on by default. |

Creating a visualization in a dashboard

While you assemble a dashboard, you might realize that you need another visualization. You can create one in the dashboard.

Procedure

1. Click **Sources**.

If you don't see the **Sources** icon, click the **Edit** icon.



2. In the **Selected sources** pane, expand the data asset that you want to use.

If a different data asset is open, click **Selected sources** to see a list of the data assets you have open.

3. To create the new visualization, complete one of the following actions:

- Drag a column onto the canvas.

IBM Cognos Analytics creates a visualization to match the column. For example, when you add Year or Department, a table is created. Drag in a measure, such as Revenue, and a bar visualization is created.

- Click **Visualizations** and select a type. Then, add a column to each field.



Creating a visualization using drop zones

You can drag data directly onto a visualization to quickly build a visualization.

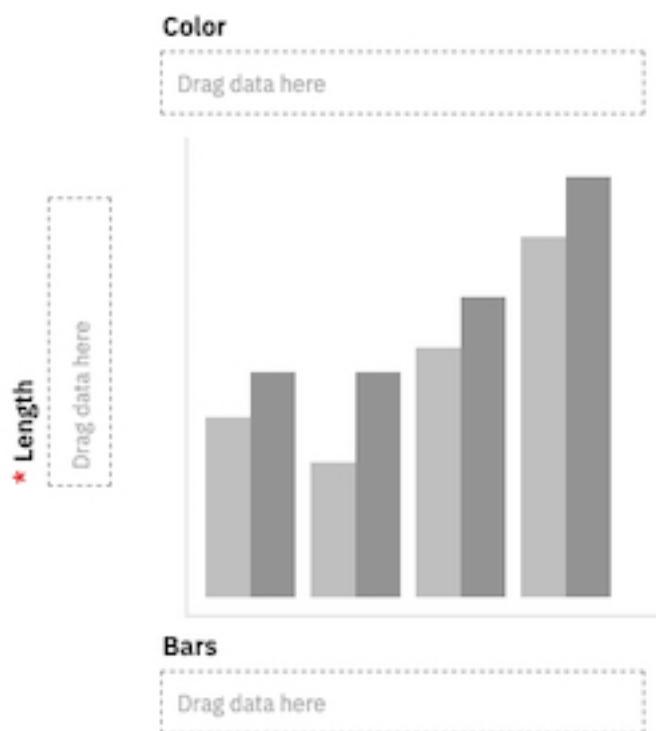
About this task

To quickly create a visualization, start with a blank visualization.

Procedure

1. Click the **Visualizations** icon and select a type.

The visualization is displayed on the dashboards with drop zones and without data.



2. Drag data from the **Sources** pane to the **Drag data here** drop zones.

Creating a visualization that uses search in data fields

You can quickly build a visualization that uses search in data fields.

Procedure

1. Click the **Visualizations** icon and select a type.

The visualization is displayed on the dashboards without data.

2. Click **Fields** and search for the data you are looking for. Click the data to populate the data field.

Results

Filters Fields Properties

Bars

org

IBM_HR_Training_2014-17.csv

abc Organization

Click or drag data here

y-start

Click or drag data here

⊕ Target

Click or drag data here

Sharing content

If an administrator connects Cognos Analytics to Slack or Microsoft Teams, or enables email sharing, you can send Cognos Analytics report and dashboard content to other users. You can also share your Cognos Analytics content via URL links and embedded html in web pages. For Dashboards only, you can save your content as an exported PDF document.

You can share content from two locations:

- your [Cognos Analytics canvas](#)
- the [Team content folder](#)

Sharing content from the canvas

You can send Cognos Analytics content that you are currently viewing in a report or dashboard to your colleagues via Email, Microsoft Teams, or Slack. You can also share visualizations from the Assistant panel that were generated by the Assistant.

For more information, see "Sharing visualizations from the Assistant" in the *IBM Cognos Analytics Dashboards and Stories Guide*.

Before you begin

Your administrator must configure a mail server and/or a collaboration platform before you can use this feature.

Procedure

1. While viewing your Cognos Analytics content in a report, dashboard, or the Assistant panel, click the **Share** icon .

Tip: A different **Share** icon  appears in a context menu, after you click the More icon  for a content folder or on the **Welcome** page. However, the **Share** panel that you invoke from a context menu only allows you to share saved report outputs or dashboards. To share an image of an asset that is open and that you are currently viewing, you must click the **Share** icon  in the application bar.

The **Share** panel appears.

2. In the **Share** panel, do one of the following to choose your sharing platform:

- Click **Email**. Then click **Send**, and go to step “3” on page 20.

Tip: If **Email** does not appear as a platform, your administrator did not enable content sharing by email.

- Click **Microsoft_Teams_platform_name**. Then click **Send**, and go to step “4” on page 21.

Tip: If a **Microsoft Teams** platform appears grayed out, your administrator has disabled the platform. If you are not part of a team in Microsoft Teams, you can join it through the pop-up window and then click on the *Microsoft_Teams_platform_name* again in Cognos Analytics to continue sharing your content.

If a **Microsoft Teams** platform doesn't appear, and your administrator had enabled it, your administrator may also need to update an advanced setting.

- Click **Slack_platform_name**. Then click **Send**, and go to step “5” on page 21.

Tip: If a **Slack** platform appears grayed out, your administrator has disabled the platform. If you are not part of a slack workspace, you can join it through the pop-up window and then click on the workspace again in Cognos Analytics to continue sharing your content.

3. If you selected **Email**, in the **Share with email** panel, perform these steps:

- a) Search for a recipient name, group, role, distribution list, or contact and then click **Search directory**. Repeat this step as necessary.

Tips:

- For external email accounts, enter the full email address, and then press Enter.
- If you start typing someone's name that you emailed recently, the full name quickly appears and you can select it.
- You can narrow the search results and speed up retrieval time by typing more characters in the recipient fields.
- Search results appear for all namespaces that you are logged into. You may need to scroll to see results for a different namespace.
- You can also browse for a recipient, by clicking **Directory > namespace**.

To quickly find an entry:

- Type text in the  **Find** field.

You can click the Search Method icon  to find entries that either contain, start with, or are an exact match with the text that you type.

- Click the filter  icon to narrow the view of entries.

- b) Enter the email subject.

- c) Enter the message that you want to send.

Tip: To format your message, use the **Styles** and **Format** buttons.

4. If you selected a Microsoft Teams platform in the **Share** panel, perform these steps:

- Enter and select up to 10 channels, group chats, or recipient names.

Tips:

- For each recipient, start typing either a Teams channel name (starting with the hashtag symbol (#) or a Teams user name if you want to send a Direct Message in Teams. As you type, the list of possible choices is filtered, until you can select the one you want.
- If you entered multiple recipients, each one will receive the content in an individual Direct Message.

- Enter the message that you want to send.

Tip: You must include some text in your message.

5. If you selected a Slack platform in the **Share** panel, perform these steps:

- Enter a channel or recipient name.

Tip: Start typing either a Slack channel name (starting with the hashtag symbol (#) or a Slack user name if you want to send a Direct Message in Slack. As you type, the list of possible choices is filtered, until you can select the one you want.

- Enter the message that you want to send.

Tip: You must include some text in your message.

6. Select **Include link** if you want your recipient to click a link to your content.

Tip: **Include link** appears only if your content is located in the **Team content** folder. Other users cannot link to content located in **My content**.

7. Select **Include image** if you want to attach an image of your content to your Email or Slack message.

8. If you selected the **Include image** option, you can edit the image before you send it: it. At the bottom of the **Share with platform_name** window, click the image before you send it.

- At the bottom of the **Share with platform_name** window, click the image.

- Follow the steps to edit the image before you share it.

9. Click **Send**.

Results

Your message (and your image, if applicable) is sent to your selected recipients via email, Microsoft Teams, or Slack. You are then notified that the selected recipients received your message successfully. You are also notified of any recipients who do not receive the message.

Editing canvas content for sharing

You can annotate a screen shot image of your Cognos Analytics content before you share it via email, Microsoft Teams, or Slack.

Before you begin

Follow steps “1” on page 20 to “8.a” on page 21 in [Sharing content from the canvas](#).

Procedure

1. To add text, an arrow, or a freehand line to your image, follow these steps:

- Go to the toolbar  of the **Modify your image (optional)** pane and click one of these icons:

- The Textbox icon 
- The Arrow icon 
- The Pen icon 

- Select a color.

- c) Type your text or draw an arrow or line.
 - d) Click **Done**.
2. To add a rectangle to your image, follow these steps:
- a) Go to the toolbar of the **Modify your image (optional)** pane and click the Rectangle icon .
 - b) Click the Border icon , and then select the border color.
- Tip:** If you previously selected a border color, the Border icon appears in that color.
- c) Click the Fill icon , and then select the fill color.
- Tip:** If you previously selected a fill color, the Fill icon appears in that color.
- d) Hover over the image and click, drag, and then release to draw a rectangle.
 - e) Click **Done**.
3. To edit any text, arrow, freehand line, or rectangle that you added, follow these steps:
- a) Ensure that you selected **Done** in the previous steps so that the Modify your image toolbar appears .
 - b) Click on the image.
 - c) To select an object, click on it.
- A rectangle with drag handles appears around the object.
- Tip:** You can also press **Tab** successively to select each object that you created in the order that you created them. For more information, see [“Keyboard commands to edit canvas content” on page 22](#).
- d) To move a selected object, move your cursor over the selected object so that the cursor changes to the Move cursor icon  and then drag the object to the position you want.
 - e) To resize a selected object, select and drag one of its handles.
 - f) To delete one or more selected objects, click the Delete icon .
 - g) To delete every object that you added to the image, from the Modify your image toolbar , click **Clear**.
4. To crop your image, follow these steps:
- a) Go to the toolbar of the **Modify your image (optional)** pane and click the Crop icon .
 - b) On the image, click, drag, and then release to draw a highlighted rectangle over the area that you want to crop.
 - c) Click **Done**.
5. If necessary, complete any remaining steps to send a message [via email, Microsoft Teams, or Slack](#).

Results

Your message and edited Cognos Analytics content are shared with the recipients via your selected collaboration platform.

Keyboard commands to edit canvas content

You can use keyboard shortcuts as an alternative way to invoke a command by pressing a combination of keyboard keys.

The following tables list keyboard shortcuts to edit an image on your canvas that you plan to share with your colleagues.

| PC keyboard command | Macintosh keyboard command | Description |
|---------------------|----------------------------|---------------------------|
| t | t | Activate the Textbox Tool |

| PC keyboard command | Macintosh keyboard command | Description |
|----------------------------|-----------------------------------|---|
| a | a | Activate the Arrow Tool |
| p | p | Activate the Pen Tool |
| r | r | Activate the Rectangle Tool |
| c | c | Activate the Crop Tool |
| q | q | Rotate object(s) clockwise 10 degrees |
| Shift + Q | Shift + Q | Rotate object(s) counter-clockwise 10 degrees |
| Delete/Backspace | Delete | Delete object(s) |
| [| [| If the active select object is a textbox, shrink the word-wrapped area horizontally by 5 px. |
| Shift + { | Shift + { | If the active select object is a textbox, shrink the word-wrapped area horizontally by 50 px. |
|] |] | If the active select object is a textbox, expand the word wrapped area horizontally by 5 px. |
| Shift + } | Shift + } | If the active select object is a textbox, expand the word wrapped area horizontally by 50 px. |
| Ctrl + z | Ctrl + z / Command + z | Undo Previous Action |
| Ctrl + y | Ctrl + y / Command + y / | Redo Previous Action |
| Escape | Escape | Close Entire Panel |

| PC keyboard command | Macintosh keyboard command | Description |
|----------------------------|-----------------------------------|---|
| Tab | Tab | Move the tool selection on the toolbar from Left to Right one at a time. If you press Tab on the final tool (for example, Clear/ Done) the focus moves from the toolbar to the image. |
| Shift + Tab | Shift + Tab | Move the tool selection on the toolbar from Right to Left one at a time. Pressing Shift + Tab on the First tool moves the focus from the toolbar to the parent element. |
| Enter | Enter/Return | Activate the selected tool/color |

| PC keyboard command | Macintosh keyboard command | Description |
|----------------------------|-----------------------------------|--|
| Up Arrow | Up Arrow | Scroll the image up (If applicable) |
| Down Arrow | Down Arrow | Scroll the image down (If applicable) |
| Left Arrow | Left Arrow | Scroll the image left (If applicable) |
| Right Arrow | Right Arrow | Scroll the image right (If applicable) |
| Up Arrow | Up Arrow | Move the selected Object(s) up by 5 px. |
| Down Arrow | Down Arrow | Move the selected Object(s) down by 5 px. |
| Left Arrow | Left Arrow | Move the selected Object(s) left by 5 px. |
| Right Arrow | Right Arrow | Move the selected Object(s) right by 5 px. |
| Shift + Up Arrow | Shift + Up Arrow | Move the selected Object(s) up by 50 px. |
| Shift + Down Arrow | Shift + Down Arrow | Move the selected Object(s) down by 50 px. |
| Shift + Left Arrow | Shift + Left Arrow | Move the selected Object(s) left by 50 px. |
| Shift + Right Arrow | Shift + Right Arrow | Move the selected Object(s) right by 50 px. |
| Shift + Alt + Up Arrow | Alt + Up Arrow | Scale the selected Object(s) up by 5 px. Bottom Right Corner is selected for scaling. |
| Shift + Alt + Down Arrow | Alt + Down Arrow | Scale the selected Object(s) down by 5 px. Bottom Right Corner is selected for scaling. |
| Shift + Alt + Left Arrow | Alt + Left Arrow | Scale the selected Object(s) left by 5 px. Bottom Right Corner is selected for scaling. |
| Shift + Alt + Right Arrow | Alt + Right Arrow | Scale the selected Object(s) right by 5 px. Bottom Right Corner is selected for scaling. |
| Shift + Alt + Up Arrow | Shift + Alt + Up Arrow | Scale the selected Object(s) up by 50 px. Bottom Right Corner is selected for scaling. |
| Shift + Alt + Down Arrow | Shift + Alt + Down Arrow | Scale the selected Object(s) down by 50 px. Bottom Right Corner is selected for scaling. |
| Shift + Alt + Left Arrow | Shift + Alt + Left Arrow | Scale the selected Object(s) left by 50 px. Bottom Right Corner is selected for scaling. |

| PC keyboard command | Macintosh keyboard command | Description |
|----------------------------|-----------------------------------|---|
| Shift + Alt + Right Arrow | Shift + Alt + Right Arrow | Scale the selected Object(s) right by 50 px. Bottom Right Corner is selected for scaling. |
| Tab | Tab | Press successively to select each object that you created in the order that you created them. If the final object is already selected, hitting Tab will move focus from the image to the Share Panel. |
| Shift + Tab | Shift + Tab | Press successively to select each object that you created in the order that you created them. If the first object is already selected, hitting Shift + Tab will move the focus from the image to the toolbar. |
| Enter | Enter/Return | Enter Textbox Editing Mode if the active select object is a textbox. |
| Escape | Escape | Deselect any active object. If the selected object is a textbox and is currently in Textbox Editing Mode, it exits Textbox Editing Mode. |
| Escape | Escape | Deselect the active object and stop drawing. If the active select object is a textbox, exit Textbox Editing Mode |
| Enter | Enter/Return | Begin drawing an object with the virtual cursor by simulating a mouse down event. |
| Enter | Enter/Return | End drawing an object with the virtual cursor by simulating a mouse |
| Up Arrow | Up Arrow | Move the Virtual Cursor up by 5 px. |
| Down Arrow | Down Arrow | Move the Virtual Cursor down by 5 px. |
| Left Arrow | Left Arrow | Move the Virtual Cursor left by 5 px. |
| Right Arrow | Right Arrow | Move the Virtual Cursor right by 5 px. |
| Shift + Up Arrow | Shift + Up Arrow | Move the Virtual Cursor up by 50 px. |
| Shift + Down Arrow | Shift + Down Arrow | Move the Virtual Cursor down by 50 px. |

| PC keyboard command | Macintosh keyboard command | Description |
|---------------------|----------------------------|---|
| Shift + Left Arrow | Shift + Left Arrow | Move the Virtual Cursor left by 50 px. |
| Shift + Right Arrow | Shift + Right Arrow | Move the Virtual Cursor right by 50 px. |

Exporting a dashboard to PDF

You can create a PDF of your dashboard to print or to share electronically.

Before you begin

Before you export your dashboard to PDF, consider the following points:

- Keep the default print margins in your browser print window.
- What you see on your screen is what you see on the PDF output. For example, a large screen displays more rows in a table than a small screen and this difference is captured in the PDF.

You can enable the PDF to display the extended contents of crosstab, table, or list visualizations in a new page.

- Make sure that your printer device driver is set to use the maximum resolution.
- Use print preview to see what your PDF looks like before printing.

Note: If you are using a Windows operating system, ensure that you installed a PDF driver. Later versions of Windows already include a feature that installs a PDF driver, called Microsoft Print to PDF. Ensure that this Windows feature is enabled.

About this task

Because each web browser handles printing differently, depending on which browser and operating system that you are using, you must select particular settings in the print window. When you export a dashboard to PDF, refer to the following steps for more details for your specific browser and OS.

Tip: To get the best PDF output results, you might need to try a different web browser such as Google Chrome.

Procedure

1. Open a dashboard.
2. Optional: Specify how you want to export the detailed contents of visualizations in the PDF output.

Some visualizations on the dashboard canvas display limited information. To find more details, you normally use the scroll bars to zoom in or scroll through the information. When you export your dashboard to PDF, the information that the visualization displays on your screen is what you see in the PDF output in the main canvas.

You can configure each crosstab, table, or list visualization on the dashboard to export detailed information into new pages in the PDF output. A hyperlink at the visualization on the main canvas in the PDF file directs you to the new page where the detailed visualization information appears.

- a) Click a visualization that you want to configure.

You can configure crosstab, table, and list visualizations to export the detailed contents.

- b) On the app bar, click the **Properties** icon.



If you don't see the **Properties** icon, click the **Edit** icon.



- c) Click **General**.
- d) Under **PDF print settings** select the **Print options** setting for your visualization.

In view

This visualization exports only the information that is in view of the screen to the PDF output in the main canvas. This setting is the default for all visualizations in the dashboard.

New page

This visualization exports the information that is in view of the screen to the PDF output in the main canvas. This visualization also exports additional information in a new page on the PDF output, and the visualization on the main canvas has a hyperlink to the new page.

3. On the app bar, click the share icon.



4. Select the **Export** tab.
5. Select a page size and orientation.
6. To include a list of the filters that are applied to your dashboard, select **Include filters**.
7. Click **Export**.

Important: The Cognos Analytics dialog for page size and orientation is the first step to properly formatting your dashboard to export to PDF. The print window for the browser is where you must make sure that the page size and orientation are properly set.

The print window for the browser opens.

8. Make sure that the settings in the print window for the browser match the **Export to PDF** options that you selected.

For example, if you selected the **Portrait** orientation in the IBM Cognos Analytics user interface, before you print the PDF, make sure that the print window for your browser is set to **Portrait**.

Note: If you select the **Tabloid** page size, some browsers label this page size as 11x17.

What to do next

The generated PDF looks closely like your dashboard. However, you might see some small differences. For more information about your specific browser and OS, see the following instructions:

- [“Exporting on Windows with Chrome” on page 27](#)
- [“Exporting on Windows with Firefox” on page 28](#)
- [“Exporting on macOS or iOS with Safari” on page 28](#)
- [“Exporting on macOS with Chrome” on page 29](#)
- [“Exporting on macOS with Firefox” on page 29](#)

Exporting on Windows with Chrome

Complete the following steps if you are exporting a dashboard to PDF with the Chrome browser on Windows by using Microsoft Print to PDF.

Procedure

1. In the print window for the browser, select the print destination: **Microsoft Print to PDF**.
2. In the **Print** dialog, expand **More settings**.
3. From the **Paper size** list, select the page that matches the **Paper size** you selected from the IBM Cognos Analytics **Export to PDF** dialog. The page orientation is automatically selected.
4. Make sure that **Background graphics** is cleared.
5. Click **Print** to export your file to PDF.

Exporting on Windows with Firefox

Complete the following steps if you are exporting a dashboard to PDF with the Firefox browser on Windows by using Microsoft Print to PDF.

Procedure

1. From the Firefox application bar, select the **Open** menu and select **Print**.
2. Click **Page Setup**.
3. From the **Page Setup** dialog, make sure that **Print Background (colors & images)** is selected and **Shrink to fit Page Width** is cleared.

Note: Do not adjust the default margins in the **Margins & Header/Footer** tab.

4. Click **OK**.
5. On the IBM Cognos Analytics app bar, click the more icon.
6. If you don't see the more icon, click the **Switch to preview icon** to switch to preview mode first.
7. Select **Export to PDF**.
8. Select a page size and orientation, and then click **OK**.

The print window for the browser opens.

9. Select the print destination: Microsoft Print to PDF.
10. From the print window for the browser, click **Properties**.
11. From the **Microsoft Print to PDF Document Properties** dialog, click the **Orientation** drop-down and select the value that matches the **Orientation** you selected in the IBM Cognos Analytics **Export to PDF** dialog.
12. Click **Advanced**.
13. From the **Microsoft Print to PDF Advanced Options** dialog, click the **Paper Size** drop-down and select the value that matches the **Page size** you selected from the IBM Cognos Analytics **Export to PDF** dialog.
14. Click **OK**.
15. Click **OK** to close the **Microsoft Print to PDF Document Properties** dialog.
16. Click **OK** to export your file to PDF.

Exporting on macOS or iOS with Safari

Complete the following steps if you are exporting a dashboard to PDF with Safari on macOS or iOS.

Procedure

1. In the print window for the browser, select the page size.

Note: If you selected the **Tabloid** page size in the IBM Cognos Analytics **Export to PDF** dialog, select **11x17** in the macOS print window.

2. From the print window for the browser, select the **Orientation** you selected in the IBM Cognos Analytics **Export to PDF** dialog.
3. Enable **Print backgrounds**.
4. Enable **Print headers and footers**.
5. From the **PDF** drop-down, select **Save as PDF**.
6. Type a name, select a folder location, and click **Save** to save your PDF.

Exporting on macOS with Chrome

Complete the following steps if you are exporting a dashboard to PDF with the Chrome browser on macOS.

Procedure

1. In the print window for the browser, enable **Headers and footers**.
2. Enable **Background graphics**.
3. Click **Save**.
4. Type a name, select a folder location, and click **Save** to save your PDF.

Exporting on macOS with Firefox

Complete the following steps if you are exporting a dashboard with the Firefox browser on macOS.

Procedure

1. From the print window for the browser, select the page size.
Note: If you selected the **Tabloid** page size in the IBM Cognos Analytics **Export to PDF** dialog, select **11x17** in the macOS print window.
2. From the print window for the browser, select the **Orientation** you selected in the IBM Cognos Analytics **Export to PDF** dialog.
3. Clear **Ignore Scaling and Shrink to Page Width**.
4. Enable **Print Background Colors**.
5. Enable **Print Background Images**.
6. From the **PDF** drop-down, select **Save as PDF**.
7. Type a name, select a folder location, and click **Save** to save your PDF.

Exporting visualization data to a CSV file

From the toolbar for a visualization, or from the data tray, you can export the data that makes up your visualization.

About this task

You can export up to 1000 rows of data from a dashboard visualization to a CSV file.

Procedure

1. Open a dashboard.
2. Select the visualization that you want to export the data for.
3. On the toolbar at the top of your dashboard, click the **Show data** icon .
If you don't see the **Show data** icon, click the **Edit** icon .
- The data for the selected visualization is displayed at the bottom of your dashboard in a table on the **Visualization data** tab.
4. Click the **Visualization data menu** icon  and select **Export data**.

| Visualization data | | Great outdoors data module | |
|-------------------------|--------------|----------------------------|--|
| Quantity | Product Cost | Product Type | |
| Show disaggregated data | 163187870.64 | Woods | |
| Export data | 135602473.09 | Irons | |
| 418560 | 78380688.26 | Rope | |
| 829354 | 6428902.92 | First Aid | |

Sharing assets from the Team content folder

You can share with your colleagues report outputs or dashboards that are located in the **Team content** folder.

Sharing assets from Team content via email

You can share Cognos Analytics report outputs or dashboards in the **Team content** folder by Email.

Before you begin

Your administrator must configure a mail server before you can use this feature.

About this task

Cognos Analytics allows you to select  **Share** in an asset's context menu from several access points:

- the **Team content** folder
- the **Home**  page, in the list of recently opened assets
- the **Search results**  pane

Note: The following task describes accessing the context menu from the **Team content** folder. However, you can use any of the access points listed above.

Procedure

1. Save your dashboard or report output in the **Team content** folder.

Tip: Other users are not authorized to open content in your **My content** folder.

2. Navigate to the saved asset in the **Team content** folder.

3. Click the More icon  for the asset and then, in the context menu, click **Share**.

Tip: A different **Share** icon  appears in the application bar at the top of your window when you are viewing content on your canvas:

- If you are editing a new report or dashboard on your canvas and you click the **Share** icon  in the application bar, the **Share** panel only allows you to share the content from your current view.

Previously saved report output cannot be shared by clicking the **Share** icon  in the application bar.

- If you are viewing a saved report output PDF and you click the **Share** icon  in the application bar, the **Share** panel only allows you to share the saved PDF version as a link or an attachment.

4. In the **Share** panel, click the **Send** tab.

Tip: If the **Send** tab does not appear, the administrator did not configure a mail server and did not configure a collaboration platform.

5. Click **Email**.

Tip: If **Email** does not appear as a platform, your administrator did not enable content sharing by email.

The **Share with email** panel appears.

6. Search for a recipient name, group, role, distribution list, or contact and then click **Directory**. Repeat this step as necessary.

Tips:

- To add an external email address, enter the full address and then press Enter.
- If you start typing someone's name that you emailed recently, the full name quickly appears and you can select it.
- You can narrow the search results and speed up retrieval time by typing more characters in the recipient fields.
- Search results appear for all namespaces that you are logged into. You may need to scroll to see results for a different namespace.
- You can also browse for a recipient, by clicking **Directory > namespace**.

To quickly find an entry:

- Type text in the  **Find** field.

You can click the Search Method icon  to find entries that either contain, start with, or are an exact match with the text that you type.

- Click the filter  icon to narrow the view of entries.

7. Keep the default subject or enter a new one.

8. Enter the message that you want to send.

Tip: To format your message, use the **Styles** and **Format** buttons.

9. Select **Include link** if you want your recipient to click a link to your content.

Tip: **Include link** appears only if your content is located in the **Team content** folder. Other users cannot link to content located in **My content**.

10. Click **Send**.

Results

Your message is sent to your selected recipients via email.

Sharing assets from Team content via Microsoft Teams or Slack

In Cognos Analytics, you can send Cognos Analytics report outputs or dashboards in the **Team content** folder via Microsoft Teams or Slack.

Before you begin

Your administrator must configure a collaboration platform before you can use this feature.

About this task

Cognos Analytics allows you to select  **Share** in an asset's context menu from several access points:

- the **Team content**  folder
- the **Home**  page, in the list of recently opened assets
- the **Search results**  pane
- the **Recent**  pane

Note: The following task describes accessing the context menu from the **Team content** folder. However, you can use any of the access points listed above.

Procedure

1. Save your Cognos Analytics dashboard or report output in the **Team content** folder.

Tip: Other users are not authorized to open content in your **My content** folder.

2. Navigate to the saved asset in the **Team content** folder.

3. Click the More icon  for the asset and then, in the context menu, click **Share**.

Tip: A different **Share** icon  appears in the application bar at the top of your window when you are viewing content on your canvas:

- If you are editing a new report or dashboard on your canvas and you click the **Share** icon  in the application bar, the **Share** panel only allows you to share the content from your current view.

Previously saved report output cannot be shared by clicking the **Share** icon  in the application bar.

- If you are viewing a saved report output PDF and you click the **Share** icon  in the application bar, the **Share** panel only allows you to share the saved PDF version as a link or an attachment.

The **Share** panel appears.

4. In the **Share** panel, do one of the following to choose your sharing platform:

- Click **Email**. Then click **Send**, and go to step “5” on page 32.

Tip: If **Email** does not appear as a platform, your administrator did not enable content sharing by email.

- Click **Microsoft_Teams_platform_name**. Then click **Send**, and go to step “6” on page 33.

Tip: If a **Microsoft Teams** platform appears grayed out, your administrator has disabled the platform. If you are not part of a team in Microsoft Teams, you can join it through the pop-up window and then click on the *Microsoft_Teams_platform_name* again in Cognos Analytics to continue sharing your content.

If a **Microsoft Teams** platform doesn't appear, and your administrator had enabled it, your administrator may also need to update an advanced setting.

- Click **Slack_platform_name**. Then click **Send**, and go to step “7” on page 33.

Tip: If a **Slack** platform appears grayed out, your administrator has disabled the platform. If you are not part of a slack workspace, you can join it through the pop-up window and then click on the workspace again in Cognos Analytics to continue sharing your content.

5. If you selected **Email**, in the **Share with email** panel, perform these steps:

- a) Search for a recipient name, group, role, distribution list, or contact and then click **Search directory**. Repeat this step as necessary.

Tips:

- For external email accounts, enter the full email address, and then press Enter.

- If you start typing someone's name that you emailed recently, the full name quickly appears and you can select it.
- You can narrow the search results and speed up retrieval time by typing more characters in the recipient fields.
- Search results appear for all namespaces that you are logged into. You may need to scroll to see results for a different namespace.
- You can also browse for a recipient, by clicking **Directory > namespace**.

To quickly find an entry:

Type text in the  **Find** field.

You can click the Search Method icon  to find entries that either contain, start with, or are an exact match with the text that you type.

Click the filter  icon to narrow the view of entries.

- Enter the email subject.
- Enter the message that you want to send.

Tip: To format your message, use the **Styles** and **Format** buttons.

6. If you selected a Microsoft Teams platform in the **Share** panel, perform these steps:

- Enter a channel or recipient name.

Tip: Start typing either a Slack channel name (starting with the hashtag symbol (#) or a Slack user name if you want to send a Direct Message in Slack. As you type, the list of possible choices is filtered, until you can select the one you want.

- Enter the message that you want to send.

Tip: You must include some text in your message.

7. If you selected a Slack platform in the **Share** panel, perform these steps:

- Enter a channel or recipient name.

Tip: Start typing either a Slack channel name (starting with the hashtag symbol (#) or a Slack user name if you want to send a Direct Message in Slack. As you type, the list of possible choices is filtered, until you can select the one you want.

- Enter the message that you want to send.

Tip: You must include some text in your message.

8. Select **Include link** if you want your recipient to click a link to your content.

Tip: **Include link** appears only if your content is located in the **Team content** folder. Other users cannot link to content located in **My content**.

9. Select **Include image** if you want to attach an image of your content to your Email or Slack message.
10. If you selected the **Include image** option, you can edit the image before you send it: it. At the bottom of the **Share with platform_name** window, click the image before you send it.

- At the bottom of the **Share with platform_name** window, click the image.
- Follow the steps to edit the image before you share it.

11. Click **Send**.

Results

Your message is sent to your selected recipients via Slack.

Linking to saved content

In Cognos Analytics, you can create a URL for any view in your dashboard or report. You can then send the URL by email or embed the URL in a web page or another dashboard or report.

You can share content objects, such as reports and dashboards, with a URL that opens the content object directly, instead of having to browse to the content object from the Cognos Analytics welcome screen. You can also embed Cognos Analytics content objects (except for data modules) in customized web pages. An embedded content object does not display the application or navigation bars.

Procedure

1. Save your Cognos Analytics dashboard or report output in the **Team content** folder.

Tip: Other users are not authorized to open content in your **My content** folder.

2. Navigate to the view that you want to send to a co-worker.

3. Click the More icon  for the asset and then, in the context menu, click **Share**.

Tip: A different **Share** icon  appears in the application bar at the top of your window if you are viewing content on your canvas. However, if you click that icon, the **Share** panel only allows you to share the content from your current view, not previously saved output.

4. In the **Share** panel, click the **Link** tab.

Tip: You can modify the URL to perform other actions, such as opening a report for editing instead of running the report, or changing the output format of the report. For more information, see *Creating custom URLs to display and run Cognos Analytics content* in *IBM Cognos Analytics Getting Started User Guide*.

5. If you want to send the link to a co-worker by email, do the following:

- a) In the **Link** section, click the **Copy** icon .

The URL is copied to your clipboard.

- b) Paste the URL into your email and send the email.

6. If you want to embed the html code for your view in a web page, go to the **Embed code** section, and follow these steps:

- a) If you want to change the height and width of the iframe that will contain the code, adjust the values in the **Width** and **Height** fields.

- b) click the Copy icon .

The URL is copied to your clipboard.

- c) Paste the URL into the html text of your web page.

Authentication sample with embedded content

The embedded content sample shows how to use the IBM Cognos Analytics REST API to sign in a user and then display embedded content.

Procedure

1. Copy the `embedded_content` folder from the `<installation_location>\samples` folder to the `<installation_location>\webcontent` folder.
2. Open the `\webcontent\embedded_content\preLoginSample.html` file in a text editor, and locate the `<select>` element:

```
<select size="1" name="namespace">
    <option value="CognosEx">CognosEx (Example)</option>
    <option value="LDAP">LDAP (Example)</option>
</select>
```

3. For any of the configured namespaces that you want to see as a selection in the login page, define the `<option>` element within the `<select>` element, using the following syntax:

```
<option value="namespace_ID">namespace_name</option>
```

The `namespace_ID` corresponds to the **Namespace ID** property, as defined for the namespace in Cognos Configuration, under **Security > Authentication**. The `namespace_name` can be any word; however, the name defined in Cognos Configuration is preferred.

4. Open the `\webcontent\embedded_content\iFrameSample.html` file, and replace the iFrame objects with **Embed** iFrame objects from your Cognos Analytics installation.
5. In a web browser, type `http://<server_name>:<port>/embedded_content/preLoginSample.html`

Results

A sign-in web page is displayed. After you sign in, the embedded content objects are shown.

Embedding a dashboard in Microsoft Teams

You can upload a Cognos Analytics app to Microsoft Teams, allowing you to connect to an external Cognos Analytics server from within Teams. You can then add a tab in Teams that displays a dashboard from the Cognos Analytics environment.

Note: You can run your Teams application on any platform: Windows, Macintosh, or the Web.

Before you begin

Ensure that these requirements are met:

- Cognos Analytics version 11.2.3 or later is configured as follows:
 - SSL is enabled
 - You have set the advanced configuration parameter `Configuration.cookieSameSite` with a value of `None`.

For more information, see [Setting the SameSite attribute on cookies](#)
- You have administrator privileges in your Teams environment.
- If you are running Teams on Firefox, you may need to turn off the Enhanced Tracking protection option.

Note: You don't need to be a Cognos Analytics administrator. If you can access a dashboard in Cognos Analytics, you can embed a dashboard in Teams.

Procedure

1. In a browser window, enter the Cognos Analytics URL, appended with `msteamsapp/download`, as follows:
`https://host_name:port_number/bi/v1/msteamsapp/download`
or
`https://web_server_name:443/virtual_directory/bi/v1/msteamsapp/download`
A .zip file, `cognosanalyticsteamsteams.zip`, is downloaded to your computer.
2. Start Microsoft Teams.
3. Click **Apps**, then click **Manage your apps**.
4. Click **Upload an app**, and then select **Upload a custom app**.
5. Browse to the `cognosanalyticsteamsteams.zip` file that you downloaded in step “1” on page 35, select it, and then click **Open**.
6. Do one of the following to specify where the dashboard tab will appear in Teams:

- Click **Add to a team**, then type a team or channel name.
- or
- Click **Add to a chat**, then type the name of a person or a chat.

7. Click **Set up tab**.

8. Enter the Cognos Analytics URL, as follows:

`https://host_name:port_number/bi/`

or

`https://web_server_name:443/virtual_directory/bi/`

9. Click **Confirm**.

10. Log into Cognos Analytics.

Note: In Teams, in both the Web application and the desktop application, you can log in using your IBM ID. Other OIDC authentication types are not supported.

11. Browse the **Team content** folder, select a dashboard, and then click **Select**.

12. Click **Save** to confirm your selection.

The Cognos Analytics dashboard is added as a tab in Microsoft Teams.

Tip: If you'd prefer to view your dashboard in Cognos Analytics, rather than in Microsoft Teams, click **Open in Cognos Analytics** in the title bar of your dashboard tab. Cognos Analytics is then launched in a new browser window. This allows you to perform other tasks in Cognos Analytics.

Resetting a dashboard

You can reset your dashboard to revert to the last saved version of the dashboard.

Before you begin

If you don't see the option to reset the dashboard, the dashboard you are viewing was never saved.

To reset all the changes you applied since you last saved the dashboard, complete the following actions:

Procedure

1. Open a saved dashboard.
2. Click the **Edit** icon  .
3. Make one or more changes to the dashboard.
4. Click the **Edit** icon  .
5. On the toolbar, click the **Reset dashboard** icon .
6. Click **OK**.

The dashboard returns to its last saved view. Any change that you made since the last saved view is lost.

Tip: After you save the dashboard, the **Reset dashboard** icon disappears from the toolbar.

Creating multilingual dashboards

You can create a dashboard or story in different languages so that a user can experience a dashboard in their language of choice. This activity is also called localizing your dashboard.

About this task

In the dashboard properties, in the **Advanced** section, there is a languages option. This option is where you get started by setting a default language and where the different languages for your localized dashboards are displayed.

The localized content can include tab titles, visualization titles, and border colors on visualizations. For text widget properties, changes to font family, font size, style, text color, fill color, and border color can all be captured in a localized dashboard. You can also localize the descriptions in image, media, and web page widgets. In a story, you can localize the scene names and other items.

Users can set the content language in **My preferences**. After you localize a dashboard, a user opens the dashboard and IBM Cognos Analytics matches the content language to the available languages in the **Languages** list. If the content language does not match any language in the **Languages** list, the default language is displayed for the dashboard. For example, if a user's content language is set to French (Canada), when the user opens the dashboard, the languages in the **Languages** list are matched according to the following order:

- French (Canada)
- French
- French (*any country*)
- Default language in the **Languages** list

Users can also select the preferred language for the IBM Cognos Analytics user interface. For more information, see [Language settings](#).

Procedure

1. Open a dashboard.
2. On the app bar, click the **Properties** icon .

If you don't see the **Properties** icon, click the **Edit** icon .

3. Click **Advanced**.
4. Click **Set default language** and select the language to localize to.

The first language that you choose becomes the default language and starts your list of languages on the **Dashboard properties** pane. You can set a different language to the default later.

5. In the **Dashboard properties** pane, under **Languages**, click the menu icon *** for the language you want to localize to, and click **Edit translations**.
You can now translate the dashboard.
6. Localize the default language by translating text widgets, titles on your visualizations, titles on tabs, and so on.
7. Click **Done**.

Note: If the language is not already added and you click **Done** without changing the dashboard, the language is not added to the **Languages** list.

8. Alternatively, download a CSV file that lists all of the text strings in your dashboard that require localization. To do so, click the menu icon *** for the default language, and click **Download**.
You can send this list to a translator for localization.

Note: You cannot upload the CSV file. A translated CSV file is a reference for you to manually localize a dashboard.

9. Click **Add another language** and select a language from the list.

Localize each translatable area that is marked with a translation mode icon .

10. Click **Done**.

11. To change the default language, click the menu icon *** for the language you want to set to the default language, and then click **Set as default**.
12. To switch any language in your **Languages** list to another language, click the menu icon *** for the language you want to switch, and then click **Switch language**.

Results

A localized dashboard opens for users based on the languages in the **Languages** list and the content language set in the user's preferences.

Collecting and analyzing performance data about a dashboard

You can use Cognos Analytics Interactive Performance Assistant (IPA) to obtain and analyze detailed performance data about your dashboards.

Before you begin

Your administrator must first [set up IPA to collect performance data](#).

About this task

The performance data for your dashboard is captured in the IPA database when you run your report. The dashboard performance reports referenced in the steps below are located in **Team content > ZIPI > Interactive Performance Assistant**.

| Action time | Dashboard object path time | Dashboard request sequence chart | Dashboard toolbar reference report |
|--|--|--|--|
| Demonstrates the process gestures and their elapsed time within a service. Last Accessed 5/9/2023, 6:31 AM | Provides detailed time information for individual objects, such as query planning ti... Last Accessed 4/6/2023, 1:11 PM | Creates a Gantt chart to visualize how requests progress through the dataset servi... Last Accessed 5/27/2023, 10:32 AM | A report used for defining a toolbar, and the report is used as a component reference in... Last Accessed 4/6/2023, 1:12 PM |
| Object path time | ProcessTime | ProcessTimeDashboard | Request sequence chart |
| Provides detailed time information for individual objects, such as query planning ti... Last Accessed 5/9/2023, 6:31 AM | Displays the elapsed time for report production in related Cognos processes. Last Accessed 5/9/2023, 6:29 AM | Shows elapsed times for object operations of a dashboard running the dataset service. Last Accessed 5/27/2023, 10:31 AM | Creates a Gantt chart to visualize how requests progress through the Cognos back... Last Accessed 5/9/2023, 6:29 AM |
| Service time | Toolbar reference report | | |
| Shows the elapsed time for report production in all Cognos services. Last Accessed 5/9/2023, 6:31 AM | A report used for defining a toolbar, and the report is used as a component reference in... Last Accessed 4/6/2023, 1:15 PM | | |

Note: The performance detail reports that are included in Cognos Analytics are in English only.

Procedure

1. In **Team content**, navigate to your dashboard and click it to open it.
2. Click the Edit icon to go in Author mode.
3. Select a widget and press **Ctrl + .** (period).

The **Serviceability** flyout opens.

4. Enable the **Show duration for all visualizations** option.

This specifies that performance information is returned.

5. Enable the **Rerun all widgets to include performance details** option.

The data in the flyout is refreshed with new performance numbers. The **Duration** numbers represent the time, in milliseconds, to run queries and render the visualization.

Server query 1 (ms) and **Server query 2 (ms)** represent the queries for the line and bar components of the chart.

6. To determine which query relates to the columns and which relates to the line, click **View Specification**. Download and search the specification. The first reference is the first query and so on.

7. Click a query link in the **Duration** section of the **Serviceability** flyout.

The **Process time dashboard** report appears.

8. Copy the ZIPI ID value to a Notepad file.

Tip: If you navigate later to one of the performance reports in **Team content > ZIPI > Interactive Performance Assistant**, you may need to select the ZIPI ID for the dashboard you're interested in.

9. Click the **Dashboard request sequence chart** button.

The **Dashboard request sequence** Gantt chart appears. By default, it shows the start and end times of all the processes of the dashboard. Processes shown include the following:

- Java process – Content Manager, presents the output in the viewer.
- BIBusTKServerMain process – Output (HTML) generation. (Also query planning and execution for CQM.)
- dataset-service - java process – Plans, executes the query, and generates a result set. (Not applicable to CQM.)

Notes:

- A dashboard running with Compatible Query Mode (CQM) does not display the dataset-service - java process, as this processing is performed in the BIBusTKServerMain process.
- Firefox might not display the Gantt chart properly.

10. If you want to see the **Dashboard request sequence** Gantt chart for a specific set of criteria, select the filters that you want.

11. Click the **Dashboard process time** button, and then click an **Action Name** link in the **Process time dashboard** report.

The **Dashboard object path time** report appears. It lists the objects for the selected action and their execution times in milliseconds.

Exploring your data

You can explore the data that is shown in a visualization by using the interactive title, drilling up or down columns, and viewing the details of a data point.

Viewing the underlying data

The data tray shows you all the rows and columns that are available for you to analyze.

Procedure

1. Click the **Sources** icon .

If you don't see the **Sources** icon, click the **Edit** icon .

2. Click the **Open data tray** icon  at the bottom of the canvas.

If you don't see the **Open data tray** icon, click the **Edit** icon .

The data for the selected visualization is displayed in a table on the **Visualization data** tab.

3. Review and explore the columns that are available for you to use.

The data fields that are in the columns are not sorted. To sort this data, click a column heading and select the sort type from the dialog.

Viewing the underlying visualization data

From the toolbar for a visualization, or from the data tray, you can view the data that makes up your visualization.

Procedure

1. Open a dashboard.
2. Select the visualization that you want to view the data for.
3. Click the **Open data tray** icon  at the bottom of the canvas.

If you don't see the **Open data tray** icon, click the **Edit** icon .

The data for the selected visualization is displayed in a table on the **Visualization data** tab.

The data fields that are in the columns are not sorted. To sort this data, click a column heading and select the sort type from the dialog.

4. Click the **Visualization data menu**  to toggle between an aggregated and disaggregated display.

Changing the columns or members in a visualization

You can focus on points that are of interest to you by changing the data that appears in the visualization.

Procedure

1. Select the visualization that you want to work with.
2. In the **Selected sources** pane, expand the data asset that you want to use.
If a different data asset is open, click the **Selected sources** next to the name of the data asset that is open.
3. To replace the column, drag a new column to the axis.
For example, if you have years in one axis and you drop months on top of it, you now see data for months.
4. To remove a column, click the **Menu** icon  and then click **Remove column**.

Selecting columns from a different data asset

You can use data from more than one data asset in your dashboard. Each visualization must use data from a single data asset. You cannot use data from multiple data assets in the same visualization.

Procedure

1. In the **Selected sources** pane, click the **Add a source** icon .

If you don't see the **Add a source** icon, click **Selected sources** next to the name of the data asset that is open.

2. Find and select the data asset that you want to use.
3. Now you can drag items from the new data asset to the canvas of your dashboard.

Drilling up and down in your data

Explore your data at different levels to gain a broader perspective or a more detailed view.

Note: When you drill back up after you drill down, you might lose filters that are applied. For example, you create a filter to include the data for sales regions of the US and Canada. You drill down on Florida. When you drill back up, by clicking **Back** from the list of options, the analysis no longer includes Canada in its scope.

Procedure

1. Right-click a label in the visualization.
2. To see more details, click **Drill down**.
3. To gain a different or broader perspective, click **Navigate**, and select another column to explore.

Working with a data point

You can view details, select, or perform actions on a data point.

About this task

You can work with an individual data point in different ways:

- You can view its details. Sometimes you want to see the data for one specific part of a visualization. For example, a bar visualization shows you the monthly sales revenue for each country that you sell in. The bar for the UK in January shows you the proportional share for the UK but not the revenue number.
- You can select it. This allows you to see the data point highlighted in all related visualizations in the current tab of the dashboard.
- You can perform actions on it. For example, you can keep or exclude it in the visualization, drill down into it, sort it, or filter it.

Procedure

1. To view the details of a data point, such as a bar, slice, or bubble, hover over it.
A tooltip appears, showing information about the data point.
2. To select the data point, click it.
3. To perform actions on the data point, right-click on it and select an option from the list.

Relinking sources

You can relink a dashboard to the same source or to a different source directly from the dashboard.

About this task

The relinked (target) source must be of the same type as the original source. For example, a package can be relinked only to another package and an uploaded file to an uploaded file.

Note: Relinking data modules is not supported.

In addition to the matching source types, the following conditions must be met:

- All columns from the original source must exist in the target source, and the columns **Identifier** properties (case-sensitive) and data types must match. For example, file A with columns ColA and ColB can be relinked to file A (in a different folder) with columns ColA and ColB. Relinking to file A with columns colA and colB would not work.

- For packages, all tables from the original source must exist in the target source and the tables **Identifier** properties (case-insensitive) must match.
- For files, the target file name must match exactly the source file name. All column names between the two files must match.
- If the file is a multi-sheet spreadsheet, then all sheet names must match between the two files.

For example, your visualizations are linked to a source called `Sales_Data.xlsx`. You can relink your visualizations to an updated `Sales_Data.xlsx` source or to a different source called `Sales_Data.xlsx`, stored in a different folder. If the same columns appear in both sources, the visualizations are updated automatically. If the columns don't match, the visualization indicates that a field is missing. To resolve the mismatched columns, expand the visualization and manually update the columns.

Note: When you relink a data source and multiple data source connections and data source signons are associated with your credentials, a message prompts you to resolve the ambiguous connections.

To switch the data source connection while you are authoring a dashboard or story, use **Relink** in the Selected sources pane.

Procedure

1. Open the **Selected sources** pane.
2. Click the **More** icon : next to a data source.
3. Click **Relink** and browse to the data source that you want to use.

Resolving ambiguous data source connections

When you open a dashboard or story and there are multiple data source connections and data source sign-ons associated with your credentials, a prompt asks you to resolve the ambiguous connections.

Procedure

When prompted, select a connection to use for your data source, and click **OK**.

If your connection also has an ambiguous sign-on, you will get prompted twice; one prompt for the connection and then a second prompt for the sign-on.

Zooming in and out

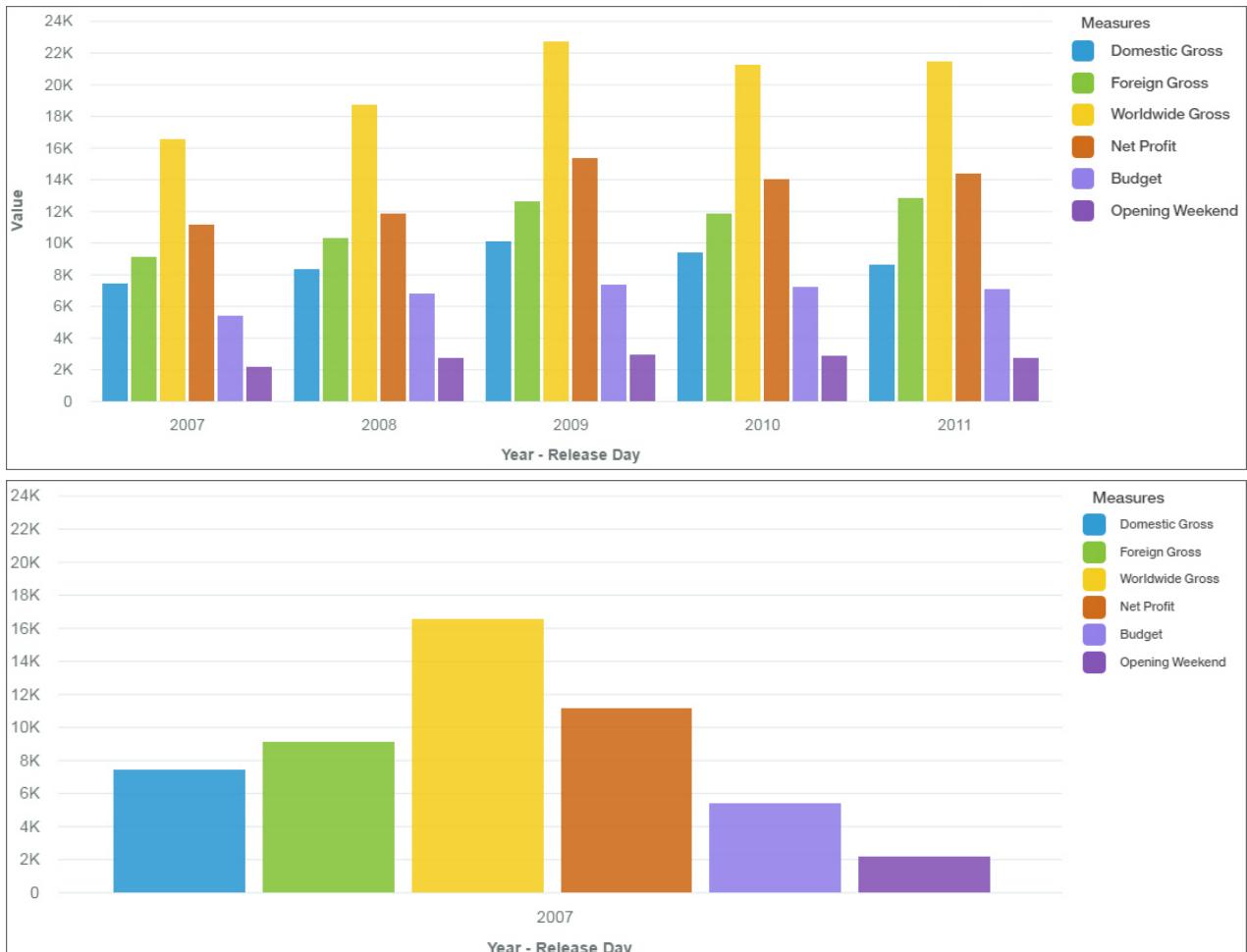
Sometimes you want to zoom in on a visualization to see the details, such as in a large bar visualization. For the visualizations that support zoom, use the scroll button on your mouse or the icons in the visualization to zoom in and out.

Procedure

- To zoom in or out, use the wheel on your mouse.

Results

When you have a column visualization that shows the results for all years, you can zoom in and pan on the year you want to investigate on.



Specify the zoom level of the canvas

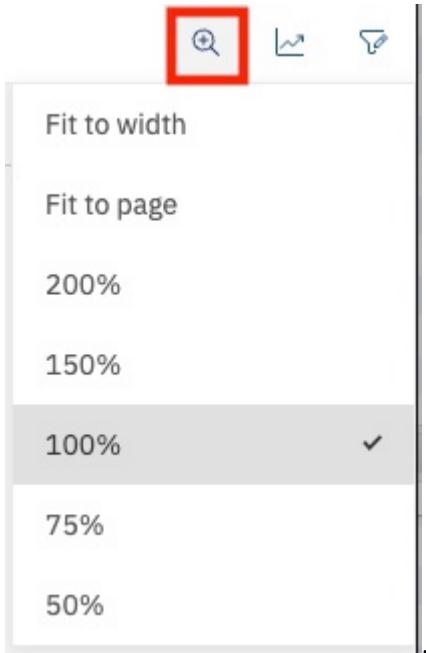
You can specify the zoom level in which to view the dashboard canvas.

About this task

When you open a dashboard in **View** mode, you can specify a zoom level when viewing the dashboard canvas. The zoom controls are available only on dashboards with the **Layout positioning** field set to **Absolute**.

Procedure

1. Open a dashboard and click the canvas background.
2. On the app bar, click the **Zoom** icon and select the zoom level for the dashboard canvas.



- **Fit to width:** Resets the view of the dashboard to fit the width of your canvas
- **Fit to page:** Resets the view of the dashboard to fit the entire canvas
- Percentage: 200%, 150%, 100%, 75%, or 50% of the actual size of the dashboard

Expanding and collapsing hierarchies in crosstabs

You can expand hierarchies in a crosstab that displays data from an OLAP data source and view several levels of data at one time.

About this task

Complete the following steps to expand or collapse a crosstab hierarchy:

Procedure

1. Open a crosstab that is using an OLAP data source.
2. Click the plus icon in a cell to expand the hierarchy and view the levels of data.
3. Click the minus icon in an expanded cell to collapse the hierarchy.

Expanding visualizations

Use focus mode to maximize the size of a visualization to quickly review chart content.

About this task

Focus mode is also available in preview for dashboard consumers.

Procedure

1. Select a visualization.
2. Click the **Expand** icon

Creating an enriched package from a Planning Analytics cube

You can create an enriched package from an Planning Analytics cube in IBM Cognos Analytics, and use features such as **Forecasting** to explore data presented in visualizations.

Procedure

1. Log in to IBM Cognos Analytics.
2. On the Welcome page, click **Manage** and then click **Administration console**.
3. In IBM Cognos Administration, click the **Configuration** tab.
4. Click **New Data Source**.
5. Create a data source connection for IBM Planning Analytics.
6. When the wizard finishes creating the data source connection, select the option to create a package.
7. Go to **Team Content** to enrich the newly created package.
8. Right-click the package and enrich package.

Results

You can now create a Dashboard with the enriched package and access features like **Forecasting**.

Visualizations

You can change the visualization type or change the columns that are used in the visualization.

Visualization types

A visualization can be one of the following types:

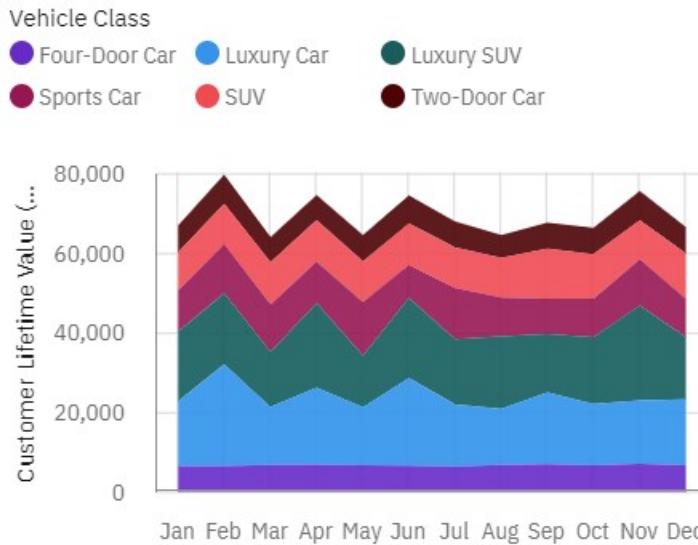
Area

Use an area visualization to emphasize the magnitude of change over time.

Area charts are like line charts, but the areas below the lines are filled with colors or patterns. Stacked charts are useful for comparing proportional contributions in a category. They plot the relative value that each data series contributes to the total. Since an area visualization stacks the results for each column or item, the total of all results is easily seen.

An area visualization is excellent for looking at revenue over time across several products. The following area visualization shows the customer lifetime value for each vehicle class per month. Since the area visualization stacks the results, you see the totals for each month.

Customer Lifetime Value by Expiry Month colored by Vehicle Class



The preceding area visualization was created by using the data in the **Customer Analysis** source. To recreate this visualization, complete the following steps:

1. From a dashboard, click **Visualizations** and select **Area**.

2. Click **Sources**  and from **Team content**, open **Samples > Data > Data > Customer Analysis**.

3. Move the following data sets to the indicated fields:

- Drag **Expiry Month** type onto the **x-axis** field.
- Drag **Vehicle Class** onto the **Color** field.
- Drag **Customer Lifetime Value** onto the **y-axis** field.

The following animation demonstrates the previous steps:

Sample dashboards

An example of an area visualization in a dashboard is available in the Samples folder.

Location

Samples > By business function > Customer experience > Dashboards > Call centre YTD performance

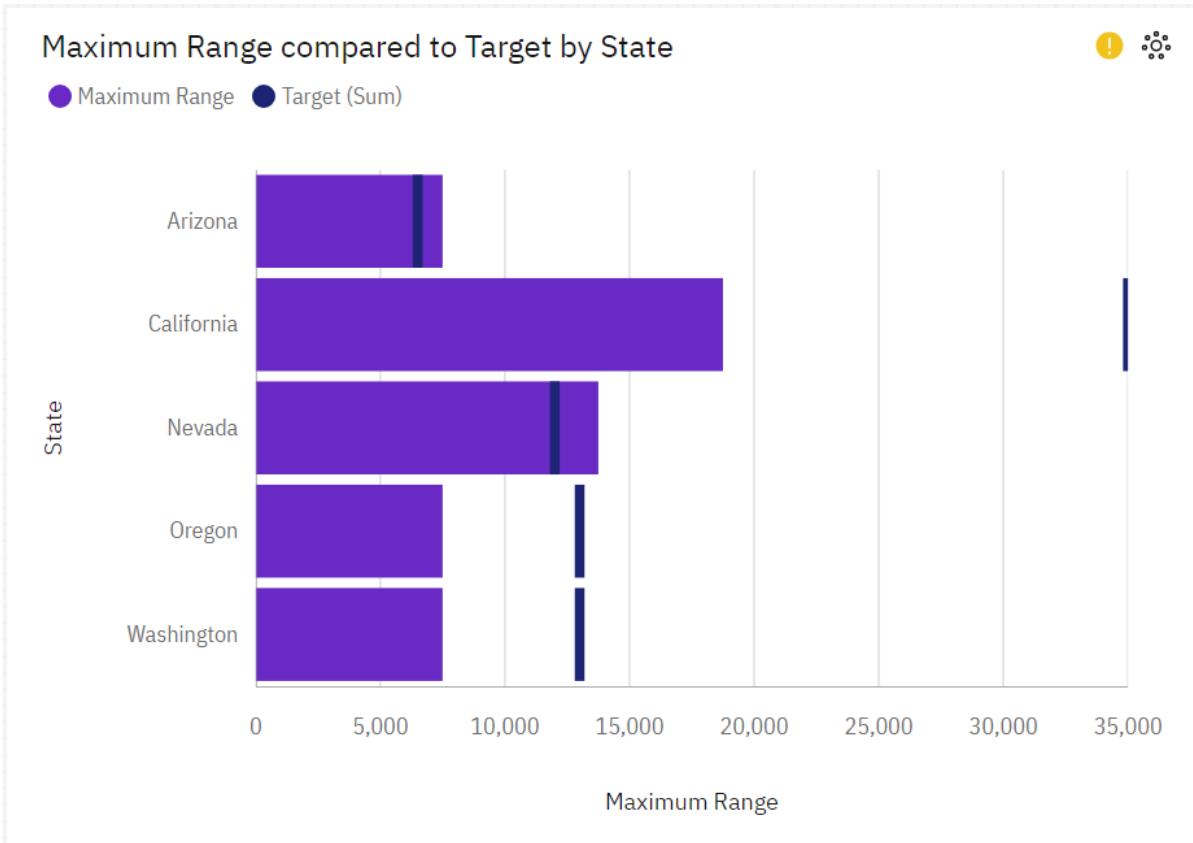
If any of the sample objects are missing, contact your administrator.

Bar

Use a bar visualization to compare values by one or more columns.

Bar visualizations use horizontal data markers that are arranged in groups to compare individual values. You can use bar visualizations to compare discrete data or to show trends over time.

A bar visualization can show change over a specific time period or can compare and contrast two or more columns in a time period or over time. If there are so many bars that the labels are impossible to read, filter the data to focus on a subset of the data or use a tree map.



The preceding bar visualization was created by using the data in the `Customer_analysis_targets.xlsx` source. To recreate this visualization, complete the following steps:

1. From a dashboard, click **Visualizations** and select **Bar**.
2. Click **Sources**  and from **Team content**, open **Samples > By feature > Mobile > Data > Source files > Customer_analysis_targets.xlsx**.
3. Move the following data sets to the indicated fields:
 - Drag **State** type onto the **Bars** field.
 - Drag **Maximum range** onto the **Length** field.
 - Drag **Target** onto the **Target** field.

The following animation demonstrates the previous steps:

Box plot

Use box plot visualizations to identify outliers and compare distributions of data.

Box plots are used to show the mean and median quartiles, and outliers for a variable. The inter-quartile range (IQR) corresponds to the length of the box, so it is the difference of the 75th and 25th percentiles ($IQR = Q3 - Q1$). The middle line in the box is the 50th percentile (Q2) which is also the median. Each box has extending lines that are called whiskers that connect to a data point. Whiskers give additional information about the spread of data. The empty circles (○) are the outliers in the data. Outliers are values that are significantly different from the rest of the data. Use the key field in a box plot visualization to determine which items you want to identify outliers and compare distributions. The mean score of the data is represented by the plus (+) sign.

The following image is an example of a box plot visualization:



To re-create this visualization, complete the following steps:

1. Follow the steps in [“Creating a visualization in a dashboard” on page 17](#).

The SampleFile_Go_Sales.xls uploaded file must be added as the dashboard source.

2. Drag the following columns to the indicated fields:

- **Gross profit** to the **y-axis** field.
- **Retailer country** to the **x-axis** field.
- **Province or State** to the **Key** field.

Note: Drill-through is not available in a box plot visualization.

Sample dashboards

A box plot visualization is available in the **Policy analysis** dashboard, on the **Renewals** tab.

Location

Team content > Samples > By industry > Insurance> Policy analysis.

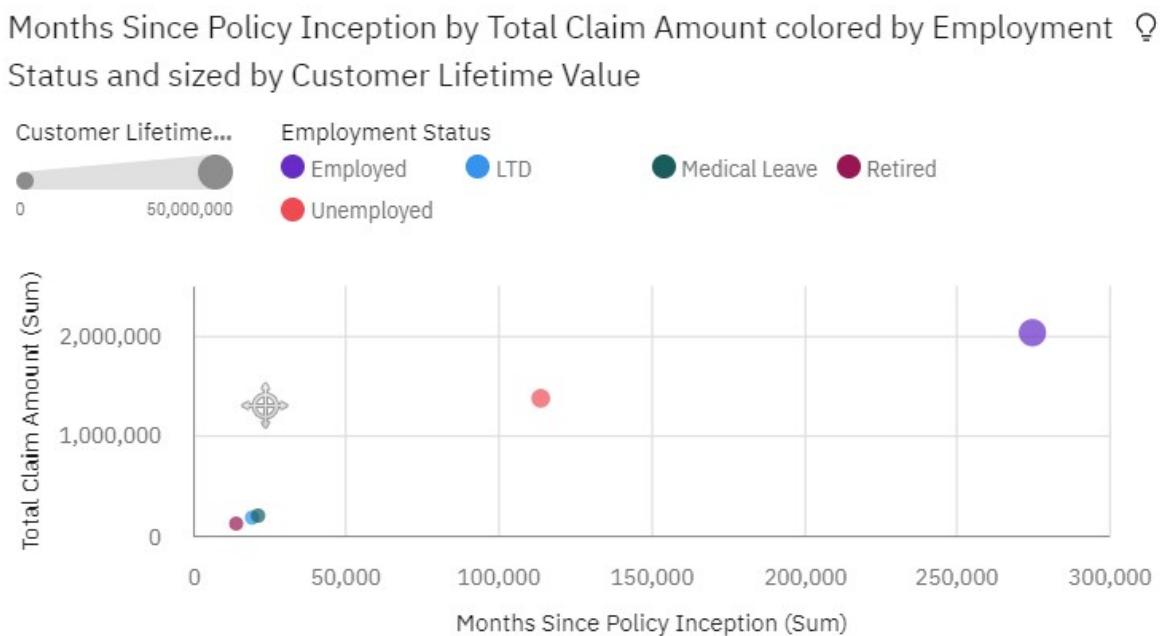
Bubble

Use a bubble visualization to show the relationships between three data sets.

A bubble visualization uses sizable plotted points—known as bubbles—to show the relationship between three data sets. The x-axis represents one data set and the y-axis represents the second data set. The size of the bubbles represents a third data set and the values of the third data set are indicated by the area of each bubble.

Example

The following bubble visualization shows when customers of different employment status claim of their insurance policy and the total claim amount. The x-axis indicates the total amount claimed, the y-axis indicates the number of months since the policy's creation, and the size of the bubble indicates the customer's lifetime value to the insurance company.



This bubble visualization was created by using the data in **Customer Analysis** source. To recreate this visualization, complete the following steps:

1. From a dashboard, open **Visualizations** and select **Bubble**.
2. Click **Sources**  and from **Team content**, click **Samples > Data > Customer analysis**.
3. Move the following data sets to the indicated fields:
 - **x-axis:** Months Since Policy Inception
 - **y-axis:** Total Claim Amount
 - **Size:** Customer Lifetime Value
 - **Color:** Employment Status

The following animation demonstrates the previous steps.

Bullet

Use bullet charts to compare measures against target values.

Bullet visualizations compare an actual measure (the bullet) to a targeted measure (the target). Bullet visualizations also relate the compared measures against colored regions in the background that provide more qualitative measurements, such as good, satisfactory, and poor. Bullet visualizations can be resized to smaller sizes while still effectively conveying information.

A bullet visualization features a single, primary measure, and compares that measure to one or more other measures to enrich its meaning. For example, you can use this visualization to compare current year-to-date revenue to a target. The primary measure is displayed in the context of a qualitative range of performance, such as poor, satisfactory, and good.

In a call center, you can use a bullet chart to measure metrics like call volume, call answer speed, and percentage of abandoned calls.

In manufacturing, you can use a bullet chart to track metrics like number of defects and orders that are shipped.

In a fitness context, you can use a bullet chart to measure metrics like steps that are taken and calories that are burnt.

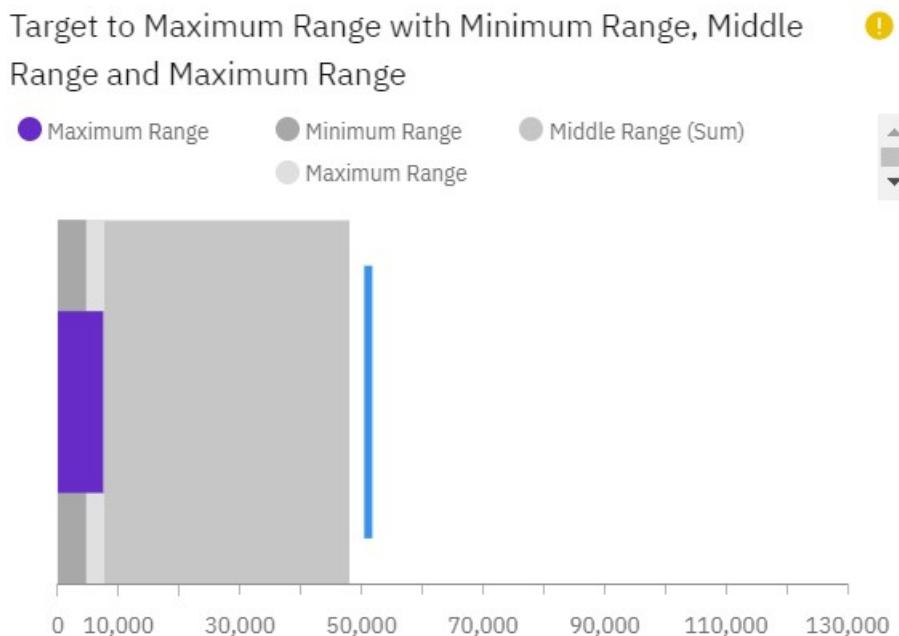
The bullet visualization contains the following fields:

- The **Actual bar** field specifies the actual measure.
- The **Target** field specifies the target measure.
- The **Minimum range** field specifies the minimum qualitative range.
- The **Middle range** field specifies the middle qualitative range.
- The **Maximum range** field specifies the higher qualitative range.

Make sure the minimum, middle, and maximum ranges relate to the actual and target measure.

Note: Drill-through is not available for a bullet visualization.

The following image is an example of a bullet visualization:



1. From a dashboard, click **Visualizations** and select **Bullet**.

2. Click **Sources** and in **Team content**, go to **Samples > By feature > Mobile > Data > Source files**. Open the **Customer_analysis_targets.xlsx** file.
3. Drag the following data sets to the indicated fields:
 - **Minimum Range** onto the **Minimum range** field.
 - **Middle Range** onto the **Middle range** field.
 - **Maximum Range** onto the **Maximum range** field
 - **Maximum Range** onto the **Actual bar** field
 - **Target** onto the **Target** field

The following animation demonstrates these steps:

Sample dashboards

An example of a bullet visualization in a dashboard is available in the **Policy analysis** sample folder.

Location

Samples > By industry > Insurance > Dashboards > Policy analysis.

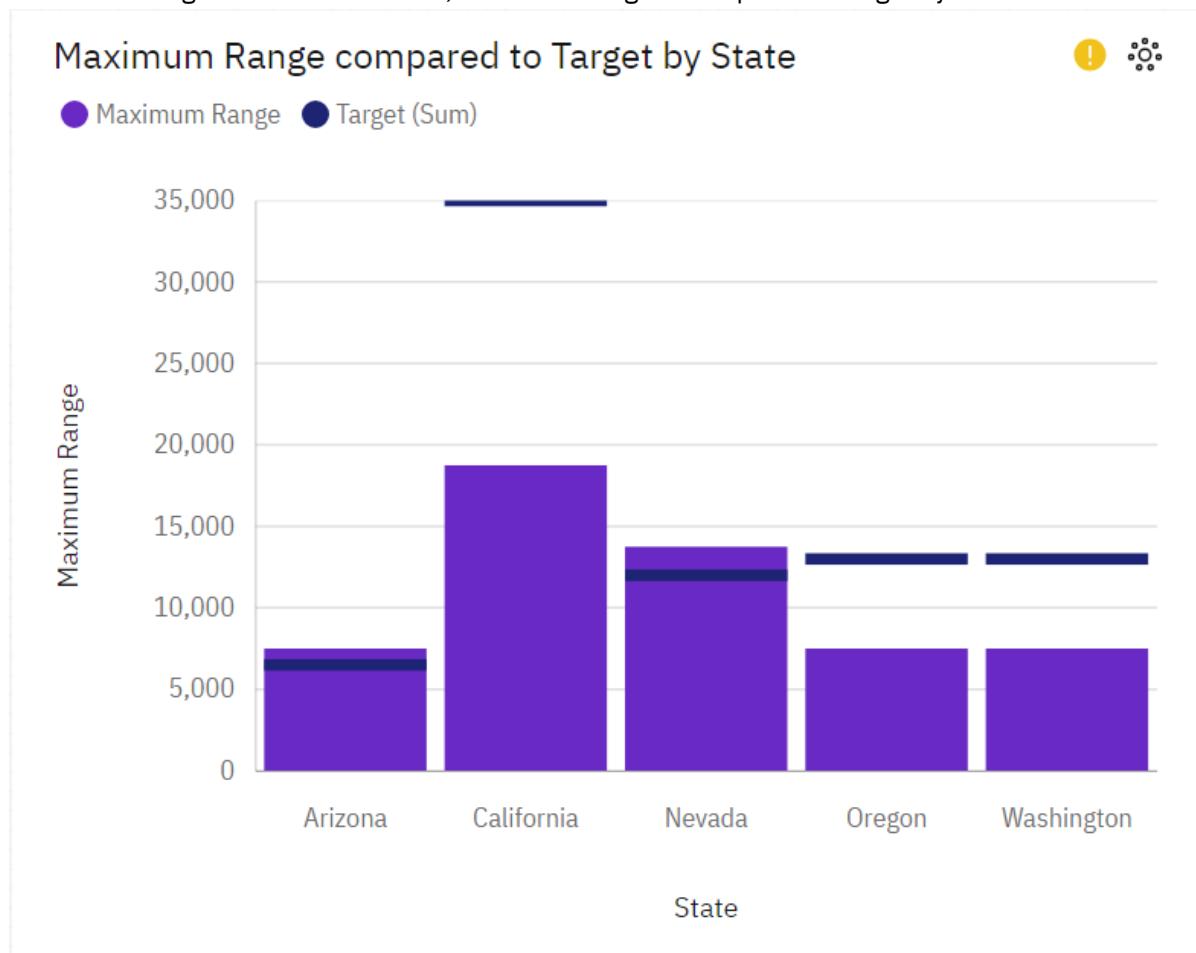
If any of the sample objects are missing, contact your administrator.

Column

Use a column visualization to compare values by one or more columns.

Column visualizations use vertical data markers that are arranged in groups to compare individual values. Use column visualizations to compare discrete data or show trends over time. A column visualization shows change over a specific time period or can compare and contrast two or more columns in a time period or over time. If there are so many bars that the labels are impossible to read, filter the data to focus on a subset of the data or use a tree map.

In the following column visualization, maximum range is compared to target by state.



The preceding bar visualization was created by using the data in the Customer_analysis_targets.xlsx source. To recreate this visualization, complete the following steps:

1. From a dashboard, click **Visualizations** and select **Column**.
2. Click **Sources**  and from **Team content**, open **Samples > By feature > Mobile > Data > Source files > Customer_analysis_targets.xlsx**.
3. Move the following data sets to the indicated fields:
 - Drag **State** type onto the **Bars** field.
 - Drag **Maximum range** onto the **Length** field.

- Drag **Target** onto the **Target** field.

The following animation demonstrates the previous steps:

Crosstab

Use a crosstab when you want to show the relationships between three or more columns or rows. Crosstabs show data in rows and columns with information summarized at the intersection points.

For example, this crosstab shows the income for states by gender.

| Income for State and Gender | | |
|-----------------------------|---------|-------------|
| | | Income |
| Arizona | F | 33,258,643 |
| | M | 30,442,757 |
| | Summary | 63,701,400 |
| California | F | 59,787,475 |
| | M | 58,523,207 |
| | Summary | 118,310,682 |
| Nevada | F | 18,390,070 |
| | M | 15,451,922 |
| | Summary | 33,841,992 |
| Oregon | F | 50,521,333 |
| | M | 47,165,161 |

Tip: A crosstab can display up to 2900 data points. If you exceed the limit, some data points and summaries are clipped at the bottom of the crosstab. To make all the summaries visible, use filters to reduce the number of data points in your crosstab.

You can drag data from the **Selected sources** pane and insert data in a column/row or drop the data on top of existing data to replace it.

You can show relationships on the rows instead of the columns.

Data player

Use a data player to see an animation of the impact of a column on the other visualizations.

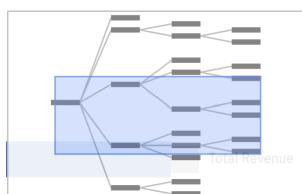
Decision tree

A decision tree shows a connected hierarchy of boxes to represent the values of records. The records consist of decisions and their possible outcomes, and highlight key insights about the decision tree.

Records are divided into groups, which are called nodes. Each node contains records that are statistically similar to each other regarding the target field. For example, a node might contain the records for males who have more than 18 years of education. Nodes can then be used to predict a target's field value. For example, the node about males and years of education might be used to predict salary.

Nodes can be the root node, internal nodes, or leaf nodes. When you click an internal node, its leaf nodes are hidden which helps you to focus on specific records. You can click a leaf node to view the path from the root node.

You can also notice the minimap in the visualization that helps you move around the areas of the tree. The minimap is especially useful if there are many nodes.



Note: Filters are not supported for decision tree visualizations.

Each branch in a decision tree corresponds to a decision rule. A decision rule predicts an outcome in the target field. The decision rules help you determine which conditions are likely to result in a specific outcome. For example, to predict the likelihood of churn, rules might identify classifications based on the customer age range and several previous claims. If customers who are older than 50 and have 1 claim or none are more likely to churn. To view the decision rules in a decision tree visualization, click the **Rules** tab.

Decision trees have a single target. If the target field of the decision tree is continuous, such as income or age, then the key insight indicators show significantly high or low groups. You can see that the color of the node is based on the average of the target for the measure. The higher the average value of the target for a node, the darker the color. If the target field of the decision tree is categorical, like marital status, then the key insight is the mode of the node. The mode of the node is the most frequently occurring category (or categories) of the target field within the group.

When you review a decision tree, you can do the following actions:

- To see all the key drivers, click the **Tree diagram** tab or the **Rules** tab.
- To focus on key drivers, click the **Tree sunburst** tab.

To edit or add key drivers, click *** on the target field.

From the **Nodes** drop-down, you can choose any of the following options to view certain nodes:

- **All:** A full tree is shown with all values.
- **Top 5:** The top five highest target values are shown.
- **Bottom 5:** The five lowest target values are shown.

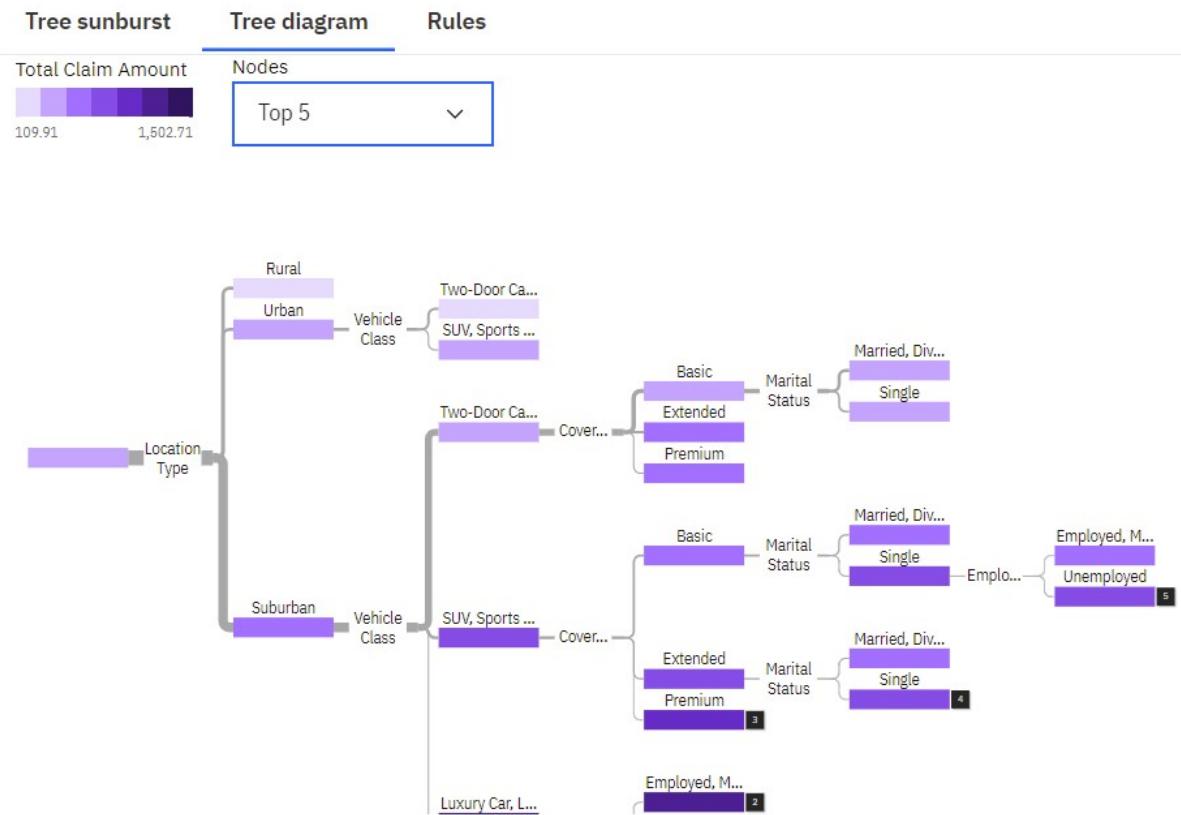
If you have a categorical measure, then select a category from the **Target category** drop-down for which you want to see the top five or bottom five targets values. Ensure that you are zoomed out to view all the top or bottom five nodes.

Examples

Insights are different depending on the type of target. If you are predicting a continuous measure, then the decision tree shows the average value of the target within the node given how far down the node is in the path. For example, consider a tree that is predicting income and with a branch for gender and then a branch for city. If you follow the path from the male node to the Chicago node, then the value that is in the Chicago node is the average income of males in Chicago.

For target fields that are a continuous measure, see the following example of a decision tree visualization for total claim amount:

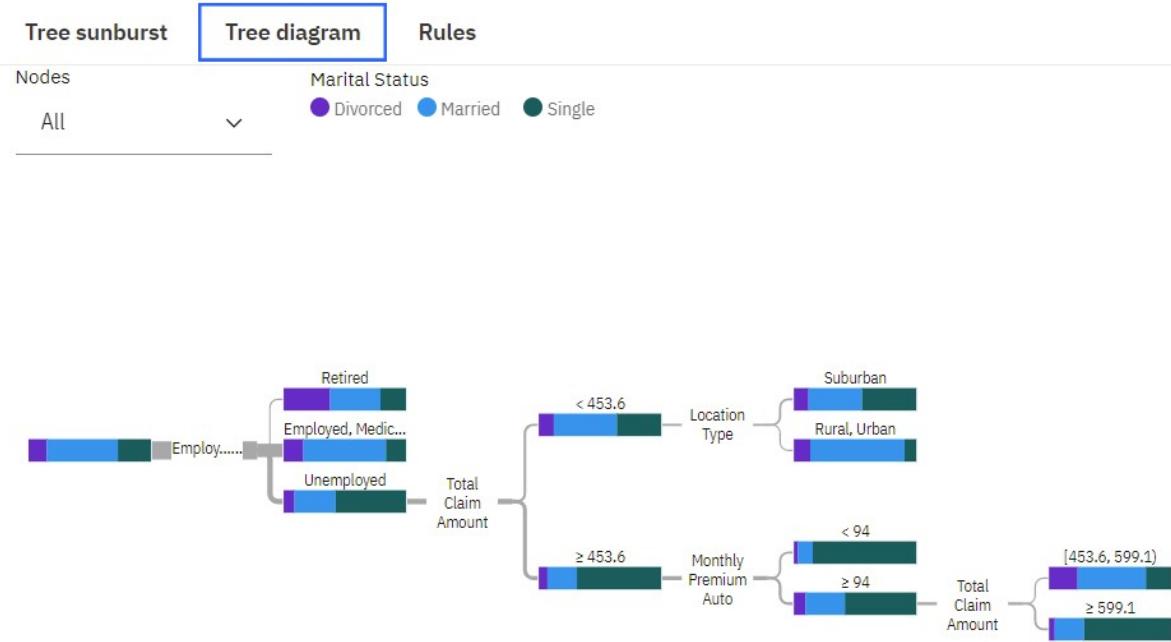
Total Claim Amount



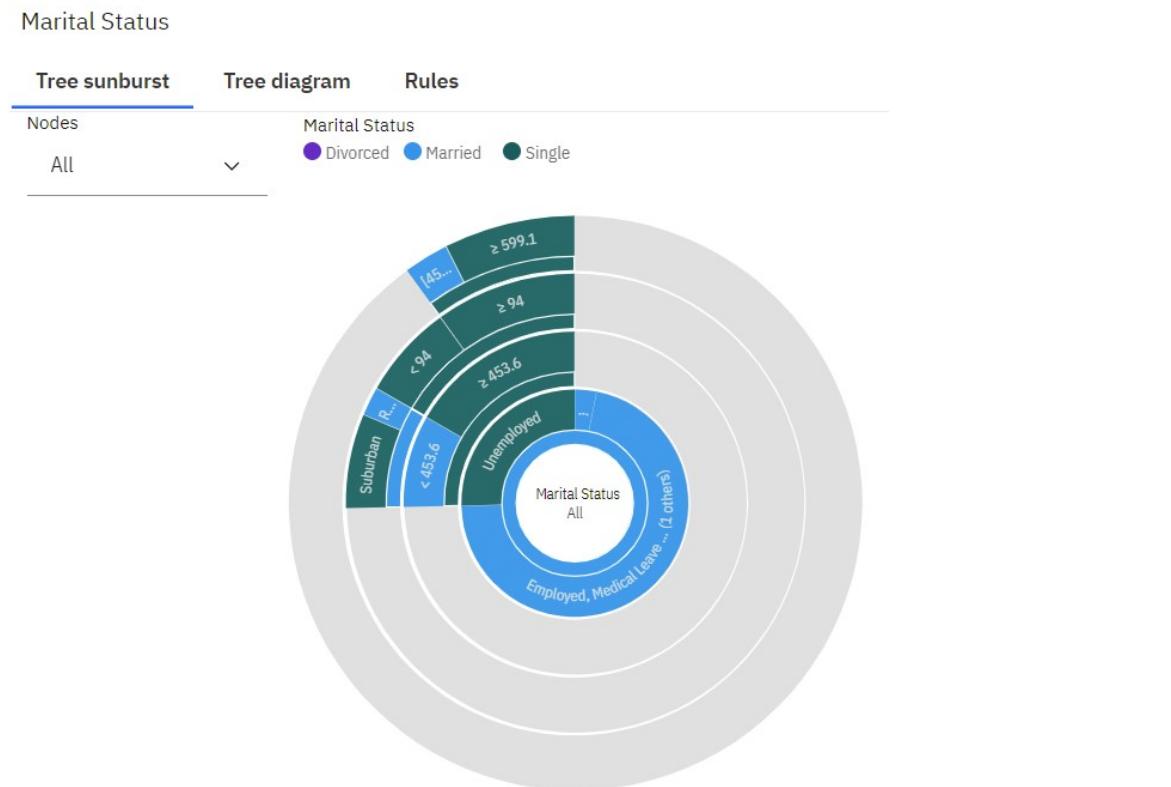
In the decision tree, a strong predictor for a high claim amount is claims that originate from policy holders who live in a suburban location, drive a luxury car, and are employed. A predictor of low claim amount is claims that originate from policy holders who live in a rural location.

For target fields that are categorical, the decision tree has different colors in each node that represents each category. The following image is a decision tree visualization that shows the distribution of people by marital status:

Marital Status



You can view the **Tree sunburst** diagram to see strong predictors of the target:



The strong predictors of the target value, or values, are shown in color while the rest are left out of the diagram. The visualization shows that being employed is a strong predictor for being married.

Samples dashboard

A decision tree visualization is available in the **Telco churn** dashboard, on the **Tenure** tab.

Location

Team content > Samples > By industry > Telecommunications> Telco churn.

Drop-down list

Use the drop-down list visualization to filter other visualizations based on the values that you select.

The screenshot shows the IBM Cognos Analytics interface with a "New dashboard" selected. On the left, a visualization library grid displays various chart types: Area, Bar, Box plot, Bubble, Bullet, Column, Crosstab, Data player, Decision tree, Driver analysis (highlighted with a green box), Drop-down list, Filter dropdown, Heat map, Hierarchy bubble, KPI, Legacy map, Line, Line and column, List, Map, and Marimekko. A "Drop-down list" visualization is placed on the dashboard canvas under "Tab 1". The visualization has a title "City" and a dropdown menu showing options: Select..., Albuquerque, Amsterdam, Anchorage, Ankara, Ann Arbor, and Azores. To the right of the visualization, the "Filters" tab is active, showing a "Drop-down selections" field with "City" selected. Below it is a "Local filters" section with a placeholder "Click or drag data here".

Use the drop-down list with either the single select or multi-select mode. This allows you to filter your visualizations with either a single value or multiple values in the drop-down list. Choose the selection type from the **Visualization properties** field.

Driver analysis

A driver analysis visualization shows you the key drivers, or predictors, for a target. The closer the driver is to the higher value on the scale, the stronger that driver is, thus, a significant predictor.

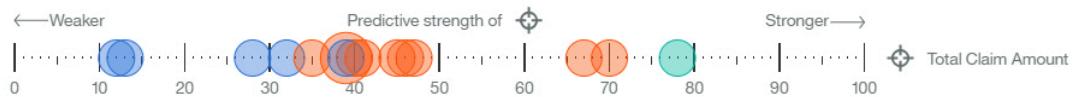
IBM Cognos Analytics uses sophisticated algorithms to deliver highly interpretable insights that are based on complex modeling. You don't have to know which statistical tests to run on your data. Cognos Analytics picks the right tests for the data.

For more information, see *Statistical tests* documentation in the *IBM Cognos Analytics Dashboards and Stories User Guide*.

Key drivers for both continuous and categorical targets are available in the driver analysis visualization in dashboards and explorations.

The following example is a driver analysis visualization that shows the predictors of the target, Total Claim Amount:

- 1 Driver
- 2 Drivers
- Combination



The predictors, or key drivers, have a weak or strong predictive strength that depends on where they are on the scale.

Note:

Due to the number of rows in the data source, the analysis is based on a representative sample of the data to improve performance.

If you hover over a data point, then the driver analysis visualization shows what drives the total claim amount:



The driver analysis visualization shows that the combination of vehicle class, location type, coverage, marital status, and employment status are the strongest drivers of the Total Claim Amount target.

Note: Filters are not supported for driver analysis visualizations.

To edit or add key drivers, click the *** on the target field.

Sample dashboards

A driver analysis visualization is available in the **Policy analysis** dashboard, on the **CLTV** tab.

Location

[Team content > Samples > By industry > Insurance > Policy analysis](#).

Dual line

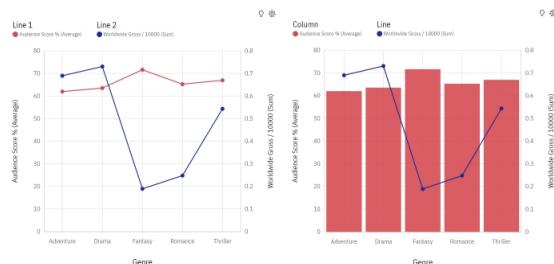
Use a dual line visualization to present as lines two data sets that have two different ranges of values.

A dual line visualization has similar functionality to a line and column visualization. Both visualizations show how two data sets relate to one another. The difference is that the dual line visualization presents both data sets as lines, while the line and column visualization uses columns for one data set and a line for the second data set.

The dual line visualization is not only a line visualization with two lines. It can also present more than one data set, but with a single value axis. The dual line visualization has two value axes that can have different ranges of values.

You can find the dual line visualization in the **System** section of the **Visualization gallery**.

The following figures are a comparison of a dual line visualization (left) and a line and column visualization (right). The visualizations show the average audience score and the worldwide gross profit divided by 10,000 for various movie genres.



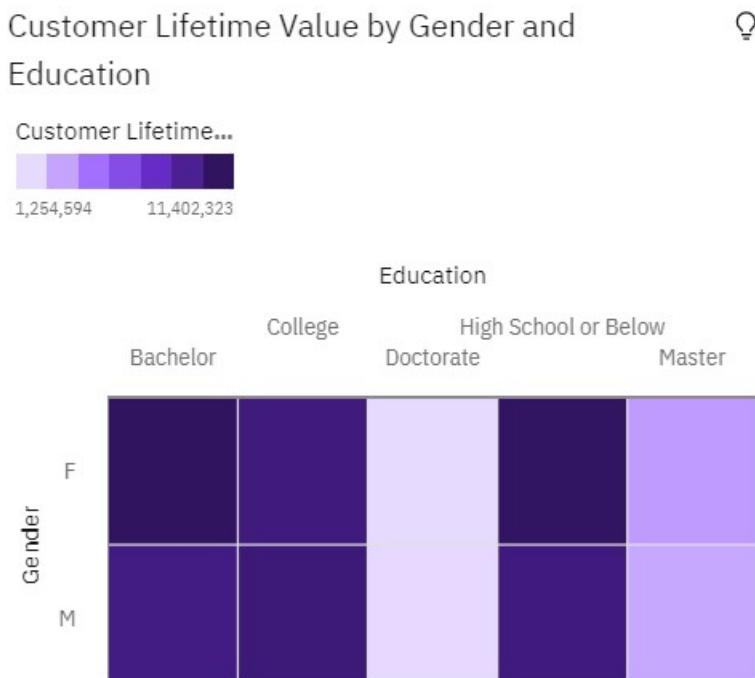
Heat map

Use a heat map visualization to show the relationship between two variables through color.

A heat map visualization uses color and the intensity of the color to show the relationship between two variables. Most often, dark colors represent high-value data points and light colors represent low-value data points.

Example

The following heat map shows the average customer lifetime value, also known as the total net profit a company generates from a customer, by gender and education.



Procedure

The following bubble visualization is created by using the data in the **Customer Analysis** source. To recreate this visualization, complete the following steps:

- From a dashboard, open **Visualizations** and select **Heat map**.
- Click **Sources**  and from Team content, click **Samples > Data > Customer analysis**.
- Move the following data sets to the indicated fields:
 - Rows:** Gender
 - Columns:** Education
 - Heat:** Customer Lifetime Value

Sample dashboards

Cognos Analytics includes a sample dashboard that contains a heat map visualization.

Location

Content > Samples > By feature > Core > Dashboard > Product line dashboard > Retailer.

If any of the sample objects are missing, contact your administrator.

Hierarchy bubble

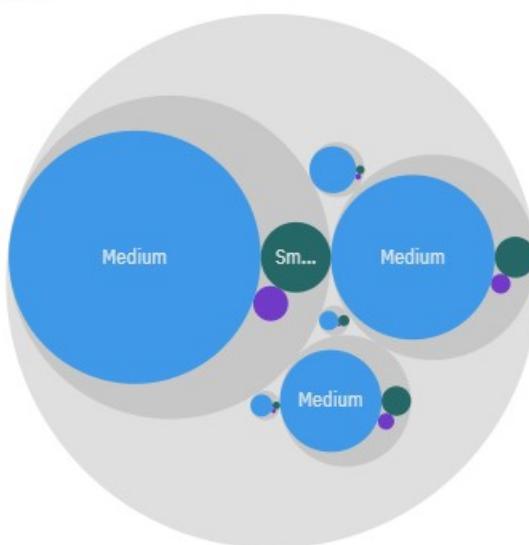
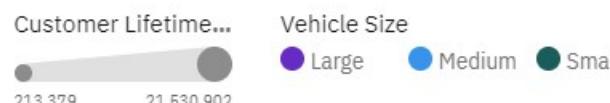
Use a hierarchy bubble visualization when you want to show relationships among columns that contain values, such as net loss.

The visualization is similar to the bubble visualization, but the bubbles are tightly packed instead of spread over a grid. The bubbles use nesting to represent the hierarchy. A hierarchy bubble visualization shows a large amount of data in a small space. The visualization shows multiple levels within a hierarchy and relationships between groups based on assigned attributes. Bubble size and color convey comparative information about categories.

In the following example, the hierarchy bubble visualization shows customer lifetime value by vehicle class per vehicle size. Each bubble is a different vehicle class in one of the three vehicle sizes. The size of each bubble is determined by the customer lifetime value of that vehicle class. The colors of the bubbles are determined by the vehicle size.

Vehicle Class and Vehicle Size hierarchy colored by Vehicle 

Size and sized by Customer Lifetime Value



1. From a dashboard, click **Visualizations** and select **Hierarchy Bubble**.
2. Click **Sources**  and from **Team content**, open **Samples > Data > Data**. Click the **Customer Analysis** data module.
3. Drag the following data sets to the indicated fields:
 - **Vehicle Class** and **Vehicle Size** onto the **Bubbles** field.
 - **Customer Lifetime Value** onto the **Size** field.
 - **Vehicle Size** onto the **Color** field

The following animation demonstrates these steps:

Sample dashboards

An example of a hierarchy bubble visualization in a dashboard is available in the **Policy analysis** dashboard

Location

Samples > By industry > Insurance > Dashboards > Policy analysis.

If any of the sample objects are missing, contact your administrator.

KPI

Use a KPI visualization to display a key performance indicator (KPI) that contains two related measures, such as revenue and planned revenue. Optionally, you can display a sparkline and a meaningful shape in your KPI visualizations.

A KPI visualization compares a base value to a target value and shows the variance between the two measures.

For example, this KPI visualization shows the actual revenue in green with an up arrow to indicate that revenue is up compared to the target. In this case, the target value is planned revenue. A sparkline displays the shape of the variation over time and is the same color as the base value.

TARGET_LINE compared to Revenue for
MonthsAsMember

\$228,762,440.00 ↑

Revenue

\$176,454,488.14 (+29.64%)

Planned Revenue



Create a similar KPI visualization by dragging measures from your own data source to the fields in an empty KPI visualization:

1. From the side bar, click the visualizations icon  and then click **KPI**.
2. Drag a measure onto the **Target value** field.
3. Drag another measure onto the **Base value** field. This value is the actual target.
4. Drag another measure onto the **Time** field. This value creates a sparkline for your KPI visualization. You can add multiple measures, for example Years and Months, to the **Time** field.

Use the properties to customize a KPI visualization. For example, the properties are set by default to display a green conditional color when the target is met and a red conditional color if the target is not met. To display the actual target in another color, under properties, expand the rule and then select a different **Text color**.

Complete the following steps to edit a conditional color rule and select a custom colors:

1. Select the KPI visualization on your dashboard.
2. Click the properties icon .
3. In the **Visualization** tab, click **Color**.
4. Under **Rules**, expand the rule that you want to edit.
5. From **Text color**, select a color.

The following information describes the KPI properties under **Rule style**:

- **Text color**

Set the color for the value, sparkline, and indicator shape.

- **Indicator**

Select a shape to display on the KPI visualization when the rule is met. For example, you might want to display a down arrow when your base value falls below a certain threshold compared to the target value.

Legacy map

Use a legacy map to represent data by geography. You can use a legacy map without internet connection.

A legacy map visualization compares values and shows categories across geographical regions. To determine if data is mappable, IBM Cognos Analytics analyzes up to 2000 values of a data set and looks for map values, such as counties, regions, states, and countries. If 80% or more of the values are recognized as map values, Cognos Analytics produces a legacy map.

For more information, see [Legacy maps in Cognos Analytics](#)

Example

The following example shows revenue by retailer country. The darker color indicates higher revenue, while the lighter color lower revenue.



Line

Use a line visualization to show trends over time.

Line visualizations identify changes and trends, suggest correlations between variables, or how a variable performs over a time range.

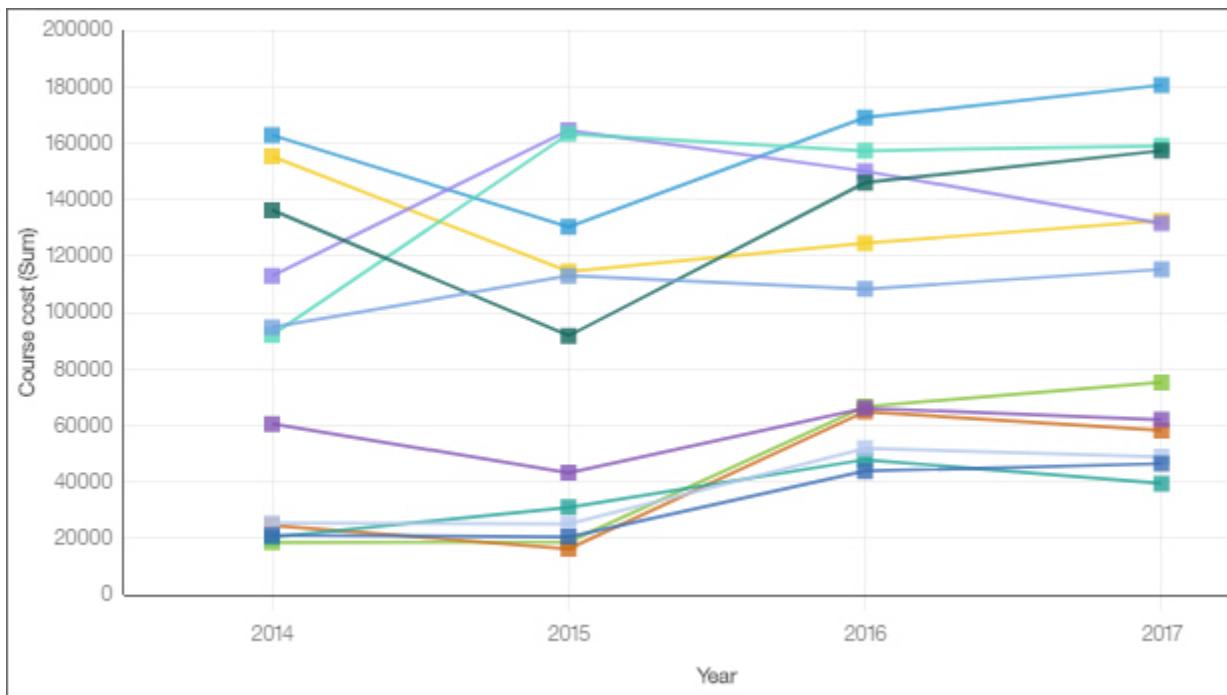
Line visualizations contain a time variable on the x-axis (such as months, years, quarters) and an independent variable on the y-axis. If the x-axis is not a time variable, use a bar or column visualization.

Limitations

- Line visualizations lose clarity when there are many plotted points.
- You can easily manipulate line visualizations. Ensure that you inspect the range of values on both the x-axis and the y-axis.

Example

The following line visualization shows the trend in course costs by department between the years 2014 to 2017.



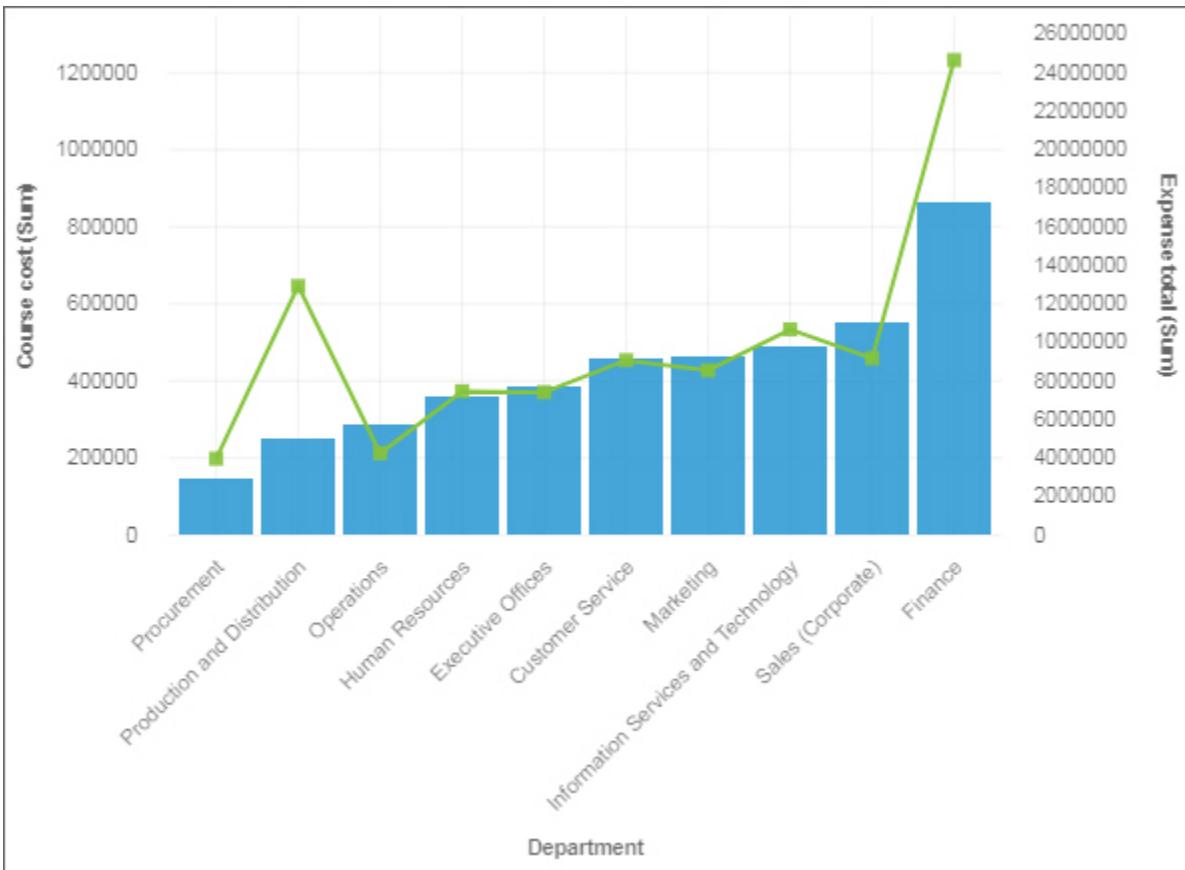
Line and column

Use a line and column visualization to show the relationship between two data sets by combining bars and lines in one visualization.

A line and column visualization presents the relationship between two data sets. By using a combination of different visualizations, each data set is better distinguished and you can combine data sets that vary widely in range.

Example

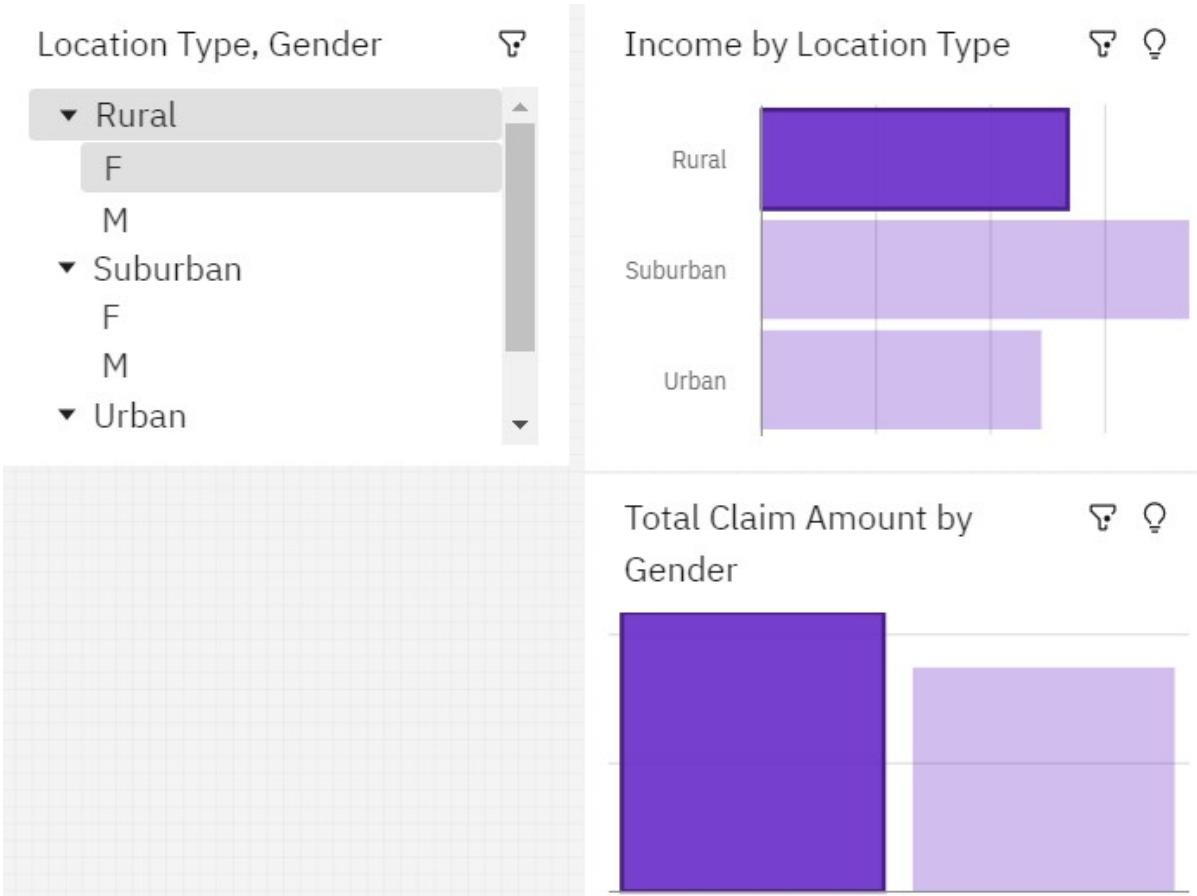
The following line and column visualization shows the course cost and corporate expenses by business departments. The column visualization indicates the course cost for each business department and the line visualization indicates the total corporate expenses of each department.



List

Use a list visualization to create an overview the data in a hierarchical way.

You can use a list visualization as a filter widget. The next example show how you can use the list visualization as a filter widget.



Map

Use a map to see patterns in geographical data assets.

Data assets in maps must contain geographical data, such as countries, states, provinces, or continents. Maps show patterns in geographical data such as levels of revenue made by specific countries or customer loyalty levels of countries. The colors heat palette on the map shows different levels with the lightest color as the least value and the darkest color as the highest.

Note: Maps do not show animations if you set your ease of access system settings to not display animations.

Maps in Cognos Analytics support the following continents:

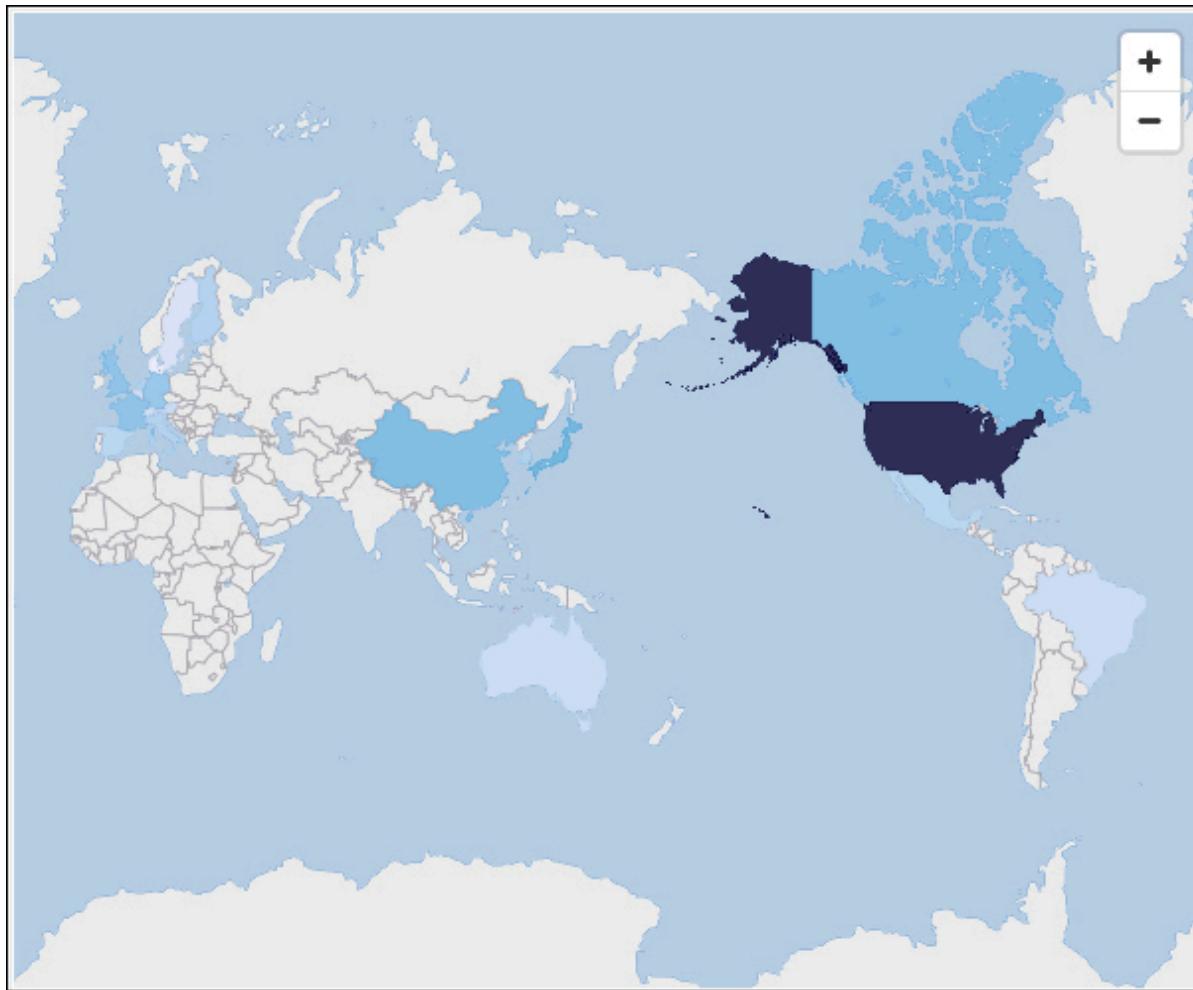
- North America
- South America
- Africa
- Asia
- Europe
- Antarctica
- Oceania

Cognos Analytics analyzes a sample of 2000 values in the location column, looking for recognizable place names to map a column. If 80% or more are recognized as map values, Cognos Analytics produces a map. If you have four countries in your location column: Brazil, China, India, and Russia. The typographical error for India means that only 75% (Brazil, China, and Russia) of the values are recognizable place names and you will not see a map. But if you have five countries and one has a typographical error in it, a map is produced.

You can use a map to view the levels of revenue by retailer country with the darker color representing the higher revenue.

Notice: If you encounter a problem with map rendering in Firefox browser on Windows, go to the topic [WebGL-related problem with maps in Firefox](#).

The following sample image is an example of a map visualization:



Marimekko

A marimekko visualization is similar to a stacked column visualization. It shows data through varying heights and includes an added dimension of data through varying column widths. The width of the columns is based on the value that is assigned to the width field. Individual segment height is a percentage of the respective column total value.

You can quickly spot large segments, such as a specific vertical that has a large share of a region. You can also identify white space such as an under-represented vertical in a specific region.

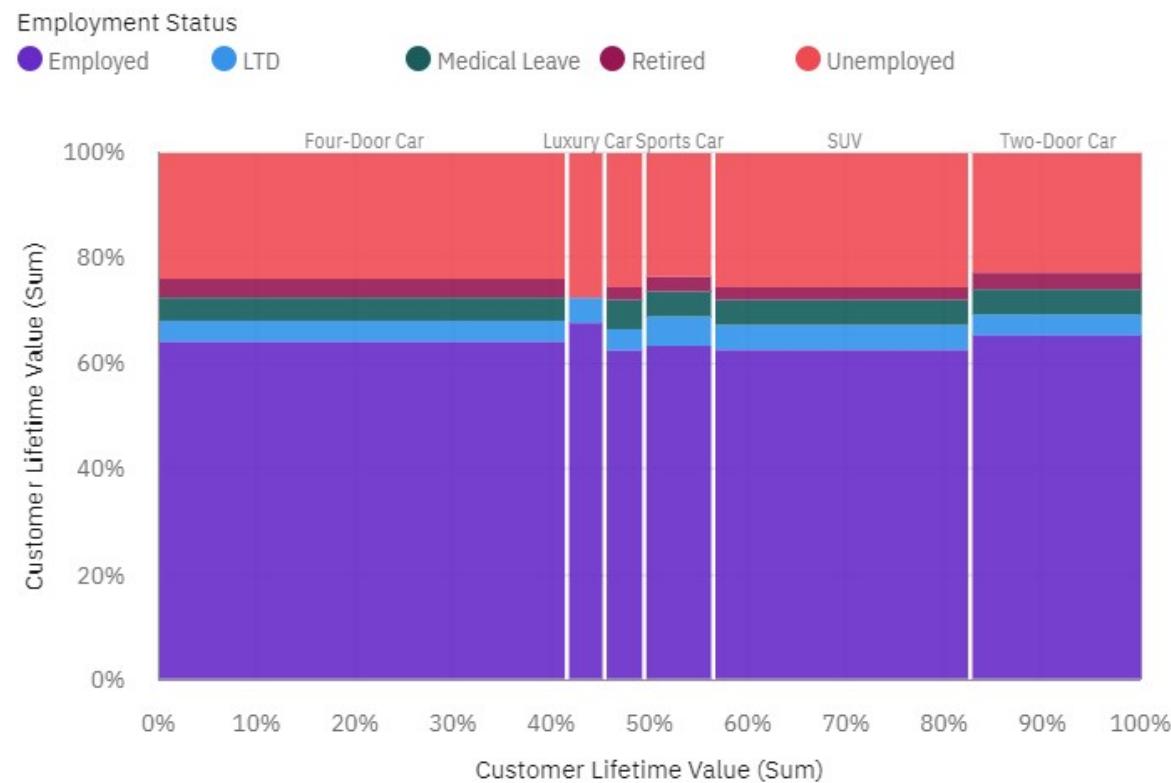
The marimekko visualization is useful for part-to-whole comparisons, where you need to show an extra measure/variable.

The marimekko visualization allows data to be depicted along two dimensions simultaneously. For example, market segments are often arrayed along the x-axis, with the width of each column corresponding to the financial value of a segment. You use marimekko visualizations in cases, for example, where you want to show the revenue contribution per product line. Or the gross domestic product per country.

The marimekko visualization can display total or partial number. If you want to use stacked percentages instead of number, then use the **Display as stacked percentage chart** option.

The following example shows the contribution of customer lifetime value and employment status in different vehicle classes with the option **Display as stacked percentage chart** enabled.

Customer Lifetime Value for Vehicle Class colored by Employment Status



The marimekko visualization was created by dragging the following data items from the Sources panel:

- Drag **Vehicle Class** type onto the **Bars** field.
- Drag **Customer Lifetime Value** onto the **Length** field.
- Drag **Employment Status** onto the **Color** field

Samples

You can see an example of a marimekko visualization in the sample dashboard **Policy analysis**. You can find the sample here: **Samples > By industry > Insurance > Policy analysis**.

If any of the sample objects are missing, contact your administrator.

Network

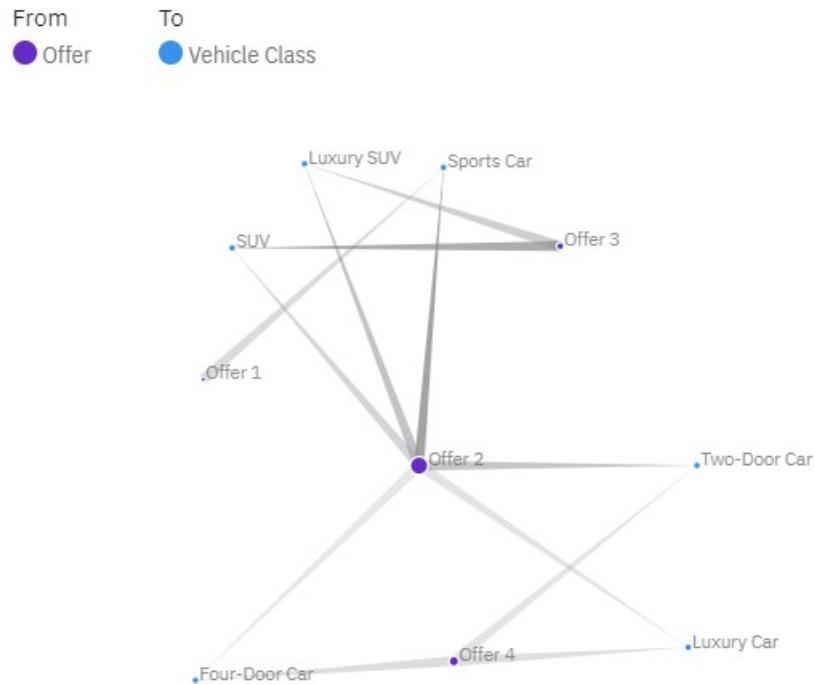
Use a network visualization when you want to see the connections among columns in your data asset. A network visualization is a good choice to show connections, networks, and points of intersection.

Network visualizations display a set of nodes that are represented by colored circles, and links that are represented by paths, to show the relationship between entities or items.

You can use the **From** and **To** fields to define the relationship that you want to investigate.

For example, the following image is a network visualization that shows offer acceptance by Vehicle Class:

Offer to Vehicle Class with line width Accepted



To re-create this visualization, complete the following steps:

1. Follow the steps in [“Creating a visualization in a dashboard” on page 17](#).

The `Customer_analysis_offers.xlsx` uploaded file must be in the dashboard source.

2. Drag the following columns to the indicated fields:

- **Offer** to the **From** field.
- **Vehicle Class** to the **To** field.
- **Accepted** to the **Line width** field.

Next, in the **Properties** pane and under the **General** tab, set the size and node properties of the visualization:

- **Size: Width** to 500px and **Height** to 300px.
- **Nodes minimum size:** 20.
- **Nodes maximum size:** 100.

Samples dashboard

A network visualization is available in the **Policy analysis** dashboard, on the **Offers** tab.

Location

Team content > Samples > By industry > Insurance> Policy analysis.

Packed bubble

Use a packed bubble visualization to display data in a cluster of circles.

A packed bubble visualization uses sizable plotted points, also known as bubbles, to show the relationship between two data sets. The size of the bubble corresponds to the value or proportion of data. There is no positional axis and the bubbles are arranged in a random cluster.

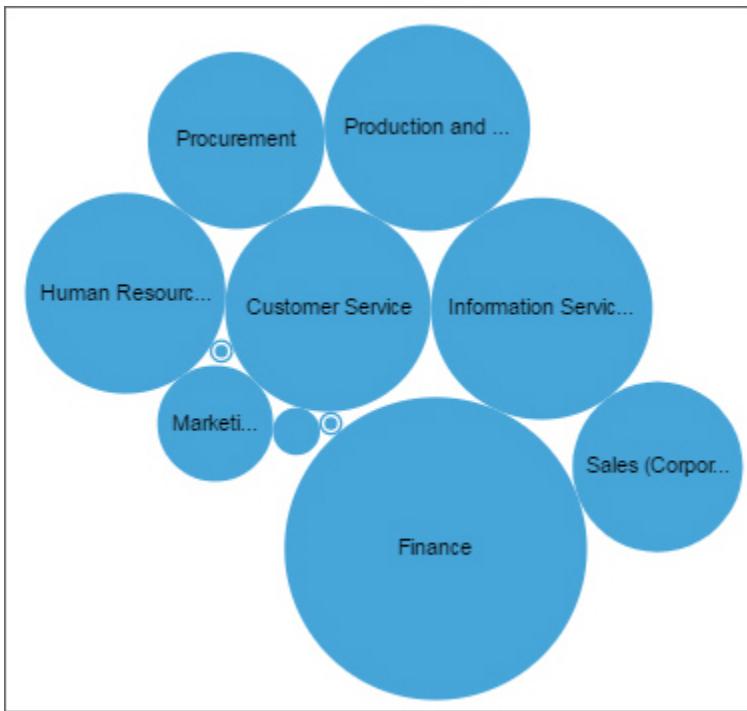
Packed bubble visualizations help convey data that contains many groups and categories. Most often, the bubbles are arranged in a hierarchical order, with larger bubbles placed at the center and smaller bubbles placed along the outside.

Limitations

Due to its random arrangement, it is difficult to interpret exact values and order on a packed bubble visualization.

Example

The following packed bubble visualization shows the number of new hires hired by different departments. Each bubble represents a department and the size of each bubble reflects the number of new hires for that department.



Pie

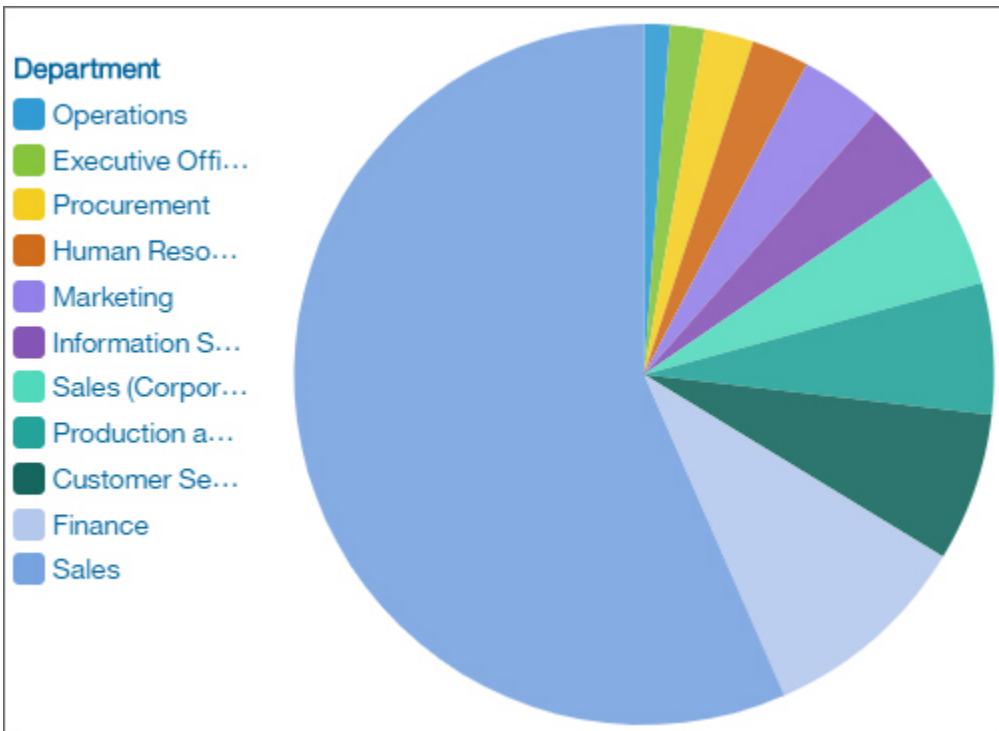
Use a pie visualization to highlight proportions.

Each slice shows the relative relationship of each part to the whole at a set point in time. The larger the size of a slice, the higher the percentage of the whole it represents. Pie charts are suitable to use with both nominal and categorical data sets.

To highlight actual values, use another chart type, such as a stacked chart. Additionally, pie charts plot a single data series. If you need to plot multiple data series, use a 100 percent stacked chart.

Reports in PDF or HTML format show a maximum of 16 pies or gauges per chart.

The following pie visualization shows quantity sold by quarter. In this example, the largest proportion of sales comes from the sales department.



You can add a hole to the middle of your pie chart to create a donut chart. For more information, see [Creating a donut visualization from a pie](#).

Point

Use a point visualization to show trends over time.

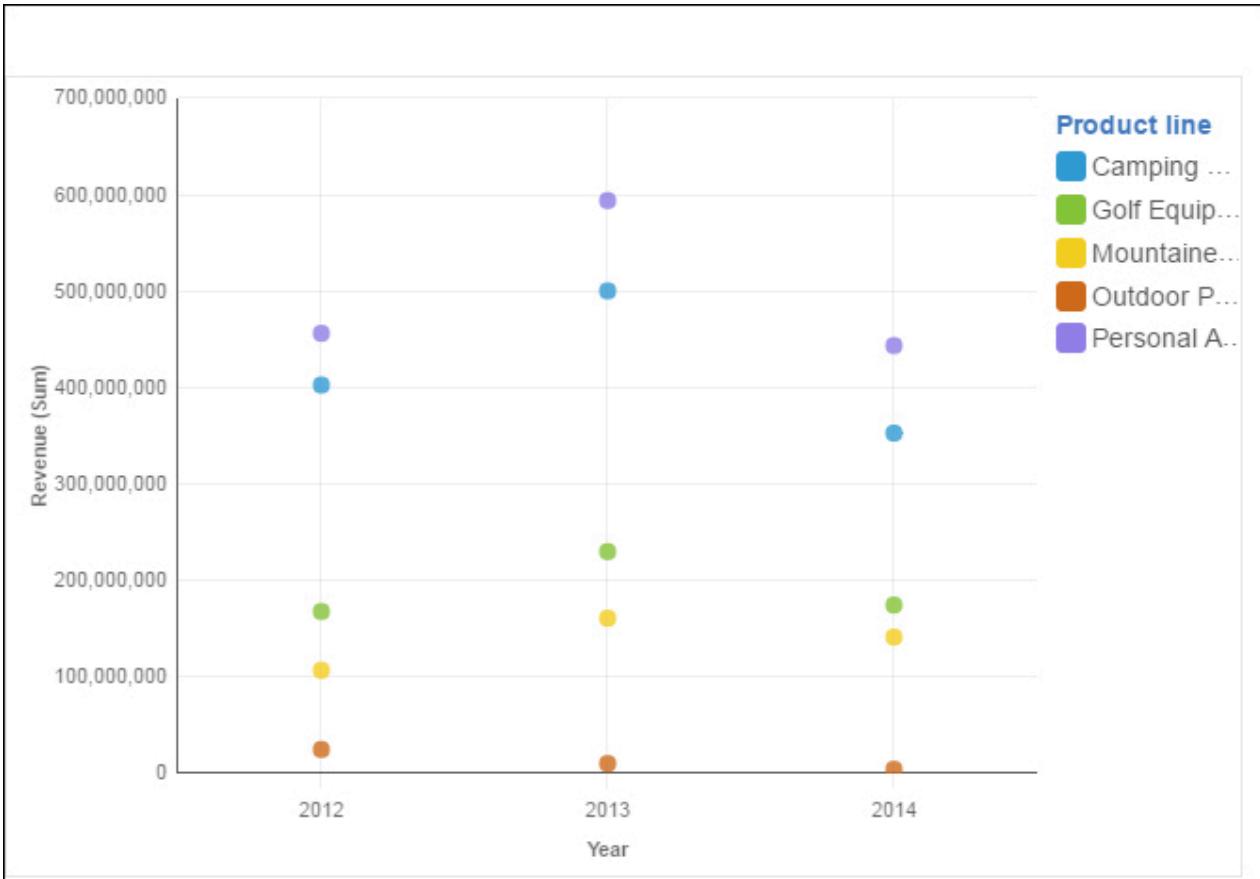
A point visualization can compare trends and cycles, infer relationships between variables, or show how a single variable is performing over time.

A point visualization is like a line chart without the connecting lines.

For an effective line visualization, the x-axis should show time, such as years, quarters, months, or days. If the x-axis shows something else, such as Canada, Netherlands, UK, and US, use a bar visualization.

Data values are plotted vertically.

For example, this line visualization shows revenue over quarter by order method type. Web orders have grown dramatically over this period.



Radar

Use a radar visualization for comparing multiple quantitative variables. The radar visualization shows which variables have similar or outlier values.

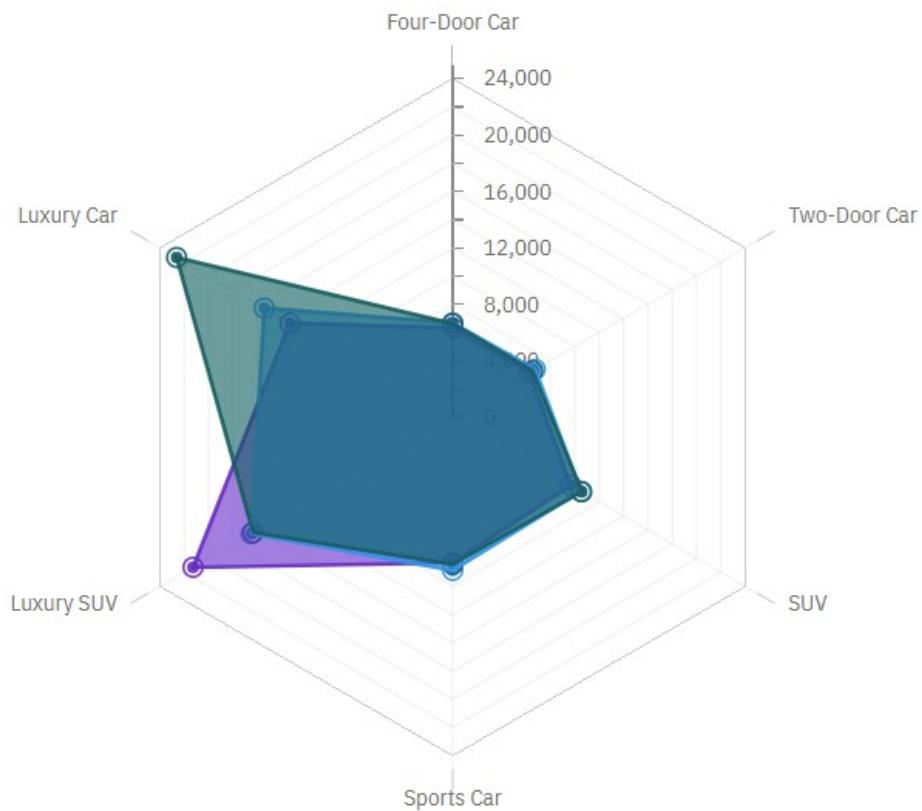
Radar visualizations also show which variables score high or low in a data set, which is useful to display performance. You can use a radar visualization in scenarios such as:

- Comparing different vehicles' speed, durability, comfort, power, and space.
- Comparing competitor profiles, such as the number of employees, revenue, profit, current stock price, and customer satisfaction.

The following example of a radar visualization shows the customer lifetime value per vehicle type, with the size of each vehicle determined by a color:

Customer Lifetime Value by Vehicle Class colored by Vehicle Size

Vehicle Size
● Large ● Medium ● Small



The **Luxury Car** type seems to have the highest **Customer Lifetime Value**.

To re-create this visualization, complete the following steps:

1. Follow the steps in [“Creating a visualization in a dashboard” on page 17](#).

The **Customer analysis** data module source must be added to the dashboard.

2. Drag the following columns to the indicated fields:

- **Vehicle Class** to the **x-axis** field.
- **Vehicle Size** to the **Color** field.
- **Customer Lifetime Value** to the **y-axis** field.

The following animation shows how this radar visualization is created:

Sample dashboards

A radar visualization is available in the **Policy analysis** dashboard, on the **Offers** tab.

Location

Content > Samples > By industry > Insurance > Policy analysis.

Radial

In a radial visualization, each bar appears in a circle with longer bars that represent larger values. Hover over a bar to see the details about it, such as the exact value represented by the bar. Each bar starts at 12 noon and goes in a clockwise direction for positive values and counterclockwise for negative values.

Radial visualizations, also known as dial charts or speedometer charts, show information as reading on a dial. The radial visualization is valid only with one category.

For example, this visualization shows renewals by offer type and gender.



Create the Radial visualization by dragging the following data items from the **Customer Analysis** section

in the **Sources** pane :

- Drag **Renew Offer Type** onto the **Bars** field.
- Drag **Number of Policies** onto the **Length** field.
- Drag **Gender** onto the **Color** field.

The next step is to set the sort properties for **Renew Offer Type** and **Gender**.

1. Click the visualization, then in the **Data** pane, click the **<Renew Offer Type>** data item.
2. Click
3. In the **Properties** pane, for **Sort order**, select **Ascending**.
4. In the **Data** pane, click the **<Gender>** data item.
5. In the **Properties** pane, for **Sort order**, select **Descending**.

6. Click  to close the **Properties** pane.

Samples

You can see an example of a radial visualization in the sample dashboard **Policy analysis**. You can find the sample here: **Samples > By industry > Insurance > Policy analysis**.

If any of the sample objects are missing, contact your administrator.

Scatter

Use a scatter visualization to identify the correlation between two data sets.

Scatter visualizations use plotted points to show the correlation between two data sets. The x-axis represents one data set and the y-axis represents the second data set. The position of each plotted point indicates its value for both the x-axis data set and y-axis data set.

Example

The following scatter visualization shows the correlation between revenue and gross profit for each product type. The x-axis indicates revenue and the y-axis indicates gross profit.



Spiral

A spiral visualization shows you the key drivers, or predictors, for a given target. The closer the driver is to the center, the stronger that driver is.

IBM Cognos Analytics uses sophisticated algorithms to deliver highly interpretable insights that are based on complex modeling. You don't have to know which statistical tests to run on your data. Cognos Analytics picks the right tests for the data.

Key drivers for both continuous and categorical targets are available in the spiral visualization in dashboards and explorations.

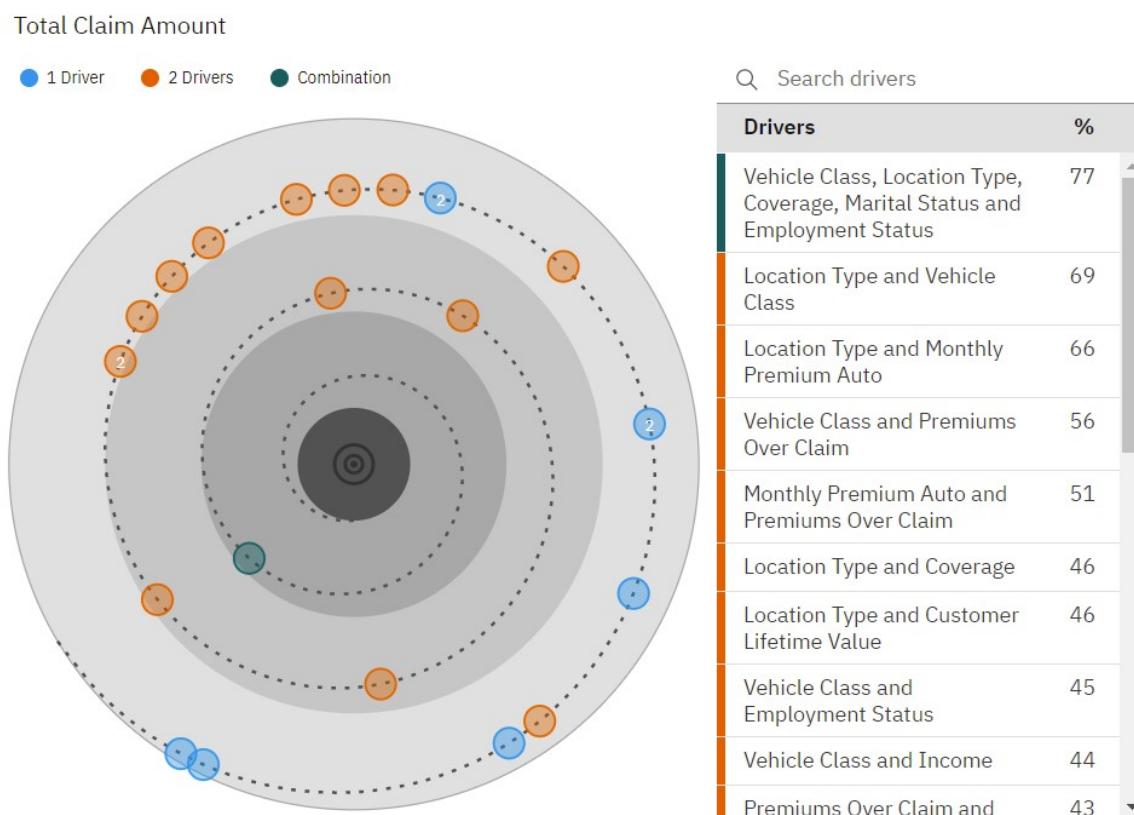
For more information, see *Statistical tests* documentation in the *IBM Cognos Analytics Dashboards and Stories User Guide*.

For example, this spiral visualization shows that the combination of vehicle class, location type, coverage, marital status, and employment status are the strongest drivers of the target, total claim amount.

You can exclude drivers from the analysis. Right-click on a driver and click the **Edit drivers** icon  . Select the drivers that you want to include in the analysis.

To edit or add key drivers, click the *** on the target field.

To improve performance, due to number of rows in the data source, the analysis is based on a representative sample of the entire data.

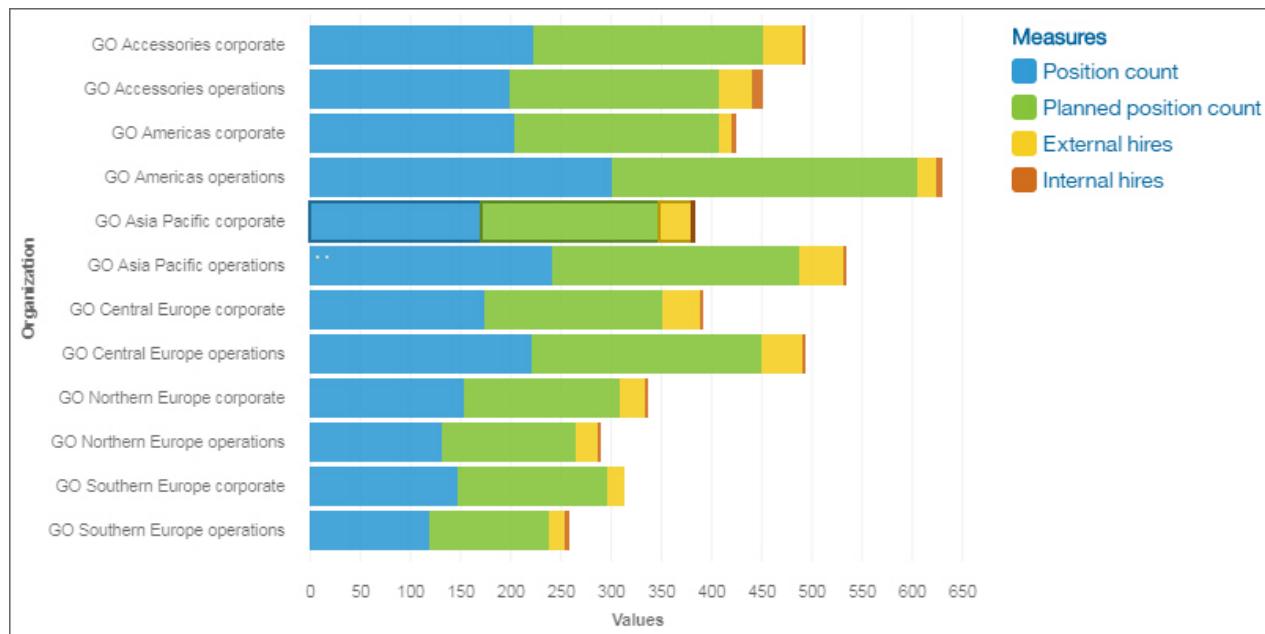


Note: Filters are not supported for spiral visualizations.

Stacked bar

Use a stacked bar visualization to compare the proportional contributions for each item to the total, such as sales for products and sales for products each month.

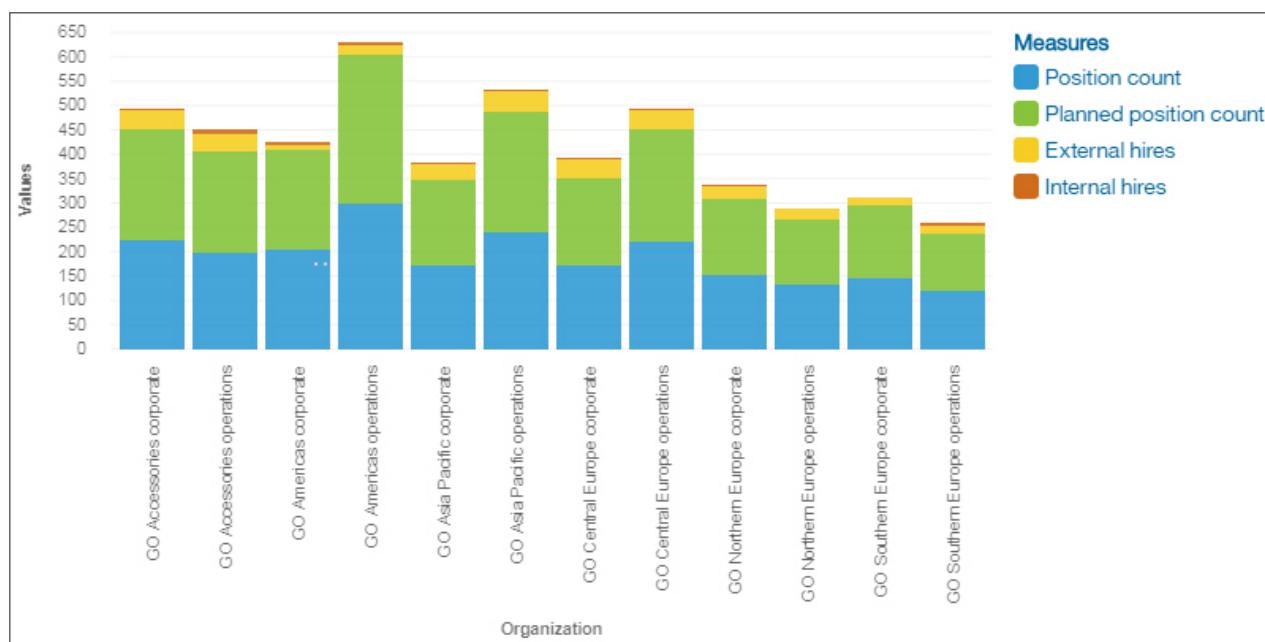
A stacked bar visualization can show change over a specific time period or compare the proportional contributions for each item to the total. If there are so many bars that the labels are impossible to read, filter the data to focus on a subset of the data or use a tree map.



Stacked column

Use a stacked column visualization to compare the proportional contributions for each item to the total, such as sales for products and sales for products each month.

A stacked column visualization can show change over a specific time period or can compare the proportional contributions for each item to the total. If there are so many bars that the labels are impossible to read, filter the data to focus on a subset of the data or use a tree map.



Summary

Use a summary visualization when you want to see the total for a measure or the count for a categorical column.

For example, this summary visualization shows total revenue for all product types.



For example, this summary visualization shows the number of departments in your organization.



For example, this summary visualization uses a shape. If you drag a shape from the **Widgets** panel onto the summary visualization, the value will be represented by multiples of the shape.



To change the color of the shape, select the summary visualization, open the **Properties**, and on the **Visualization** tab, modify the **Element color** property.

Visualization properties

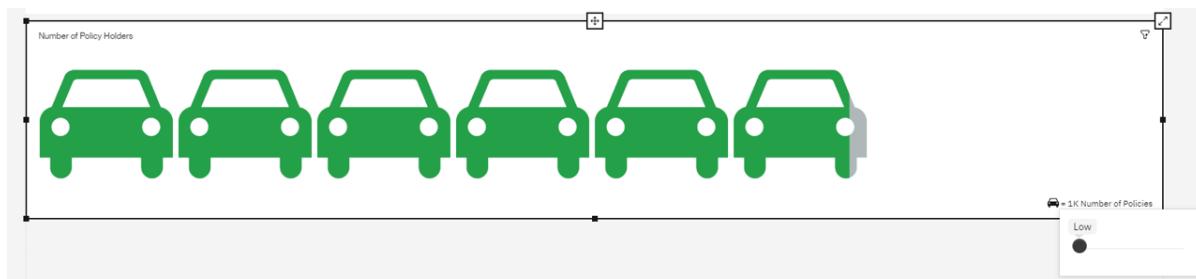
Visualization General

Color

Element color #24A148

Chart

To change the scale represented by the shape, click the legend in the bottom right corner and use the slider to select **Low**, **Default**, or **High**.



Sunburst

A sunburst visualization is used to illustrate how underlying data predicts a chosen target and highlights key insights.

Table

Use a table to show detailed information from your database, such as product lists and customer lists. A table shows data in rows and columns. Each column shows all the values for a data item in the database or a calculation based on data items in the database.

For example, this crosstab shows the income for states by gender.

Gender, Income and State

| State | Gender | Income |
|------------|--------|-----------|
| Arizona | F | 38,009.88 |
| | M | 36,766.61 |
| Summary | | 37,405.4 |
| California | F | 37,792.34 |
| | M | 37,323.47 |
| Summary | | 37,558.95 |
| Nevada | F | 40,417.74 |
| | M | 36,187.17 |
| Summary | | 38,369.61 |
| Oregon | F | 37,872.06 |

Adding more columns to a table

You can focus on points that are of interest to you by adding more data to the visualization.

1. Drag another column to the field where you want additional data.
2. Drop the column beside the existing column.

Starting from Cognos Analytics version 11.1.4, you can drag data from the **Selected sources** pane and insert data in a column/row or drop the data on top of an existing data to replace it.

Resizing columns

To change the column width, in the table heading, click the column border on the right. The border color is changed to blue, and the pointer is turned into a double-headed arrow. Drag the border to the left or to the right, based on the amount of content in the column.

| Vehicle Class | Employment Status | Number of Open Complaints |
|---------------|-------------------|---------------------------|
| Four-Door Car | Employed | 1,180 |
| | Unemployed | 460 |
| Luxury Car | Employed | 46 |
| | Unemployed | 22 |

The minimum column width is 100 pixels. Resizing a column does not affect adjacent columns.

You can also resize the heading height by clicking the bottom border of the heading row and dragging the border up or down.

Treemap

Use a treemap visualization to identify categories and the proportional size of categories in a data set.

A tree map visualizes large amounts of hierarchically structured data. The structure illustrates the hierarchy of the data content and the area of the rectangle is proportionate to the amount of data it represents.

Organization

You can organize a treemap by color in the following ways:

- **By value:** In a treemap that is colored by value, each color and rectangle represents one value. The area of the rectangle represents the proportion of the value to the total.
- **By category:** In a treemap that is colored by category, each color represents a category and each category is further divided into multiple levels. The area of the rectangle indicates the proportion of the value to the total.

Display modes

Treemap visualizations support the following display modes:

- **Squareified:** The default display mode.
- **Slice:** Displays measures that belong to the same node in a vertically sliced way.
- **Dice:** Displays measures that belong to the same node in a horizontally sliced way.
- **Slice - Dice:** Displays stacked hierarchical measures that belong to the same node in a vertically sliced way.

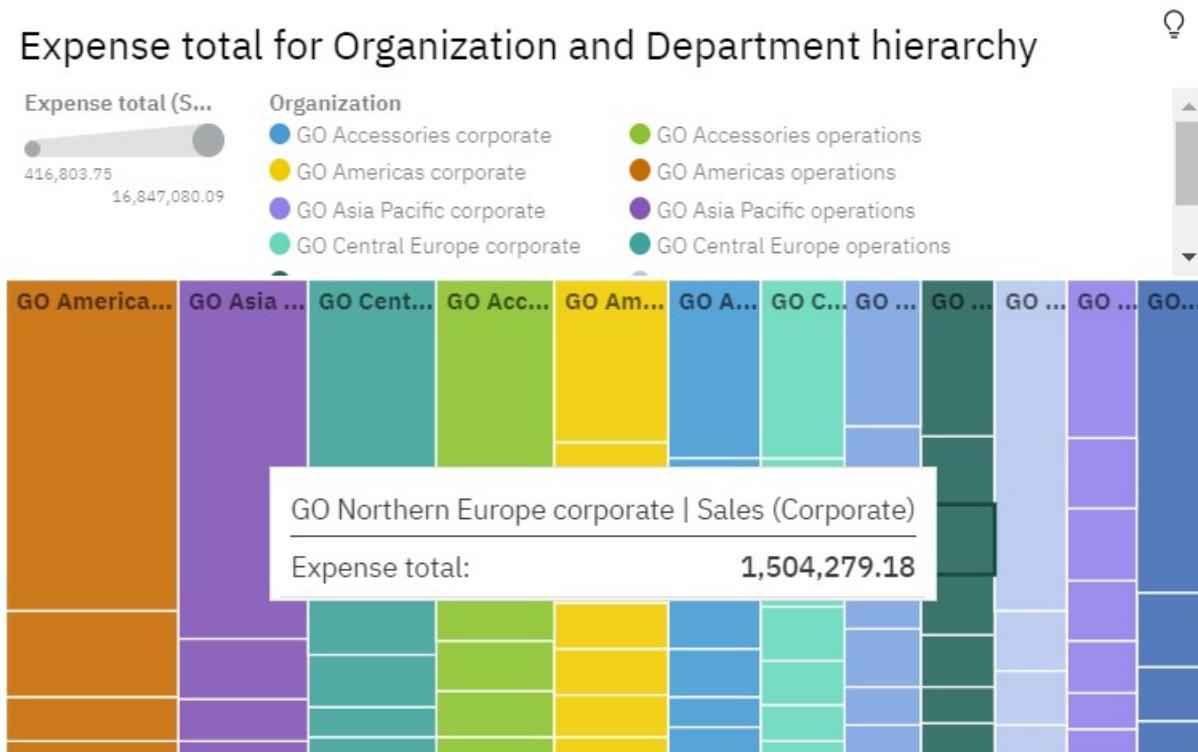
Limitations

Tree maps do not support data with negative numbers. A treemap ignores negative values.

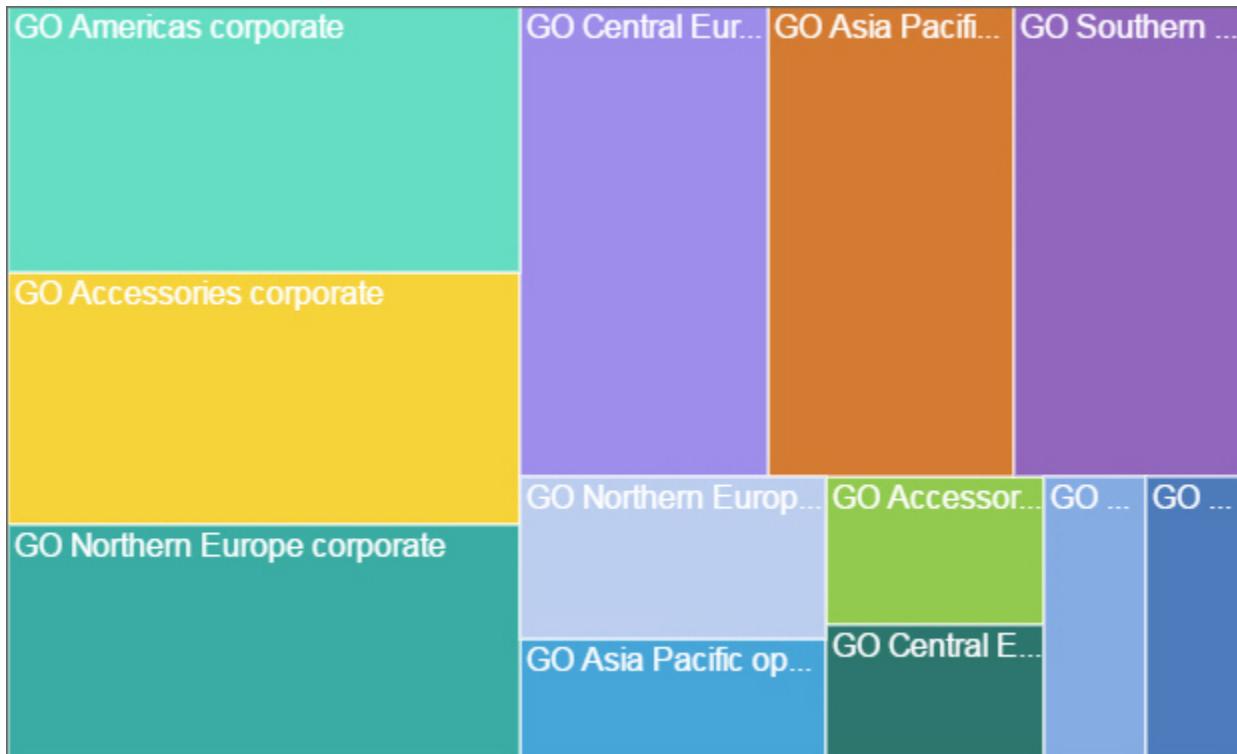
Example

The following treemap illustrates how much different regional departments contribute to the total expenses of a corporate company.

Total expenses organized by value:



Total expenses organized by value:



Sample dashboards

Cognos Analytics includes a sample dashboard that contains a treemap visualization.

Location

Content > Samples > By industry > Industrial manufacturing> Dashboard > Monitor bottle manufacturing

Waterfall

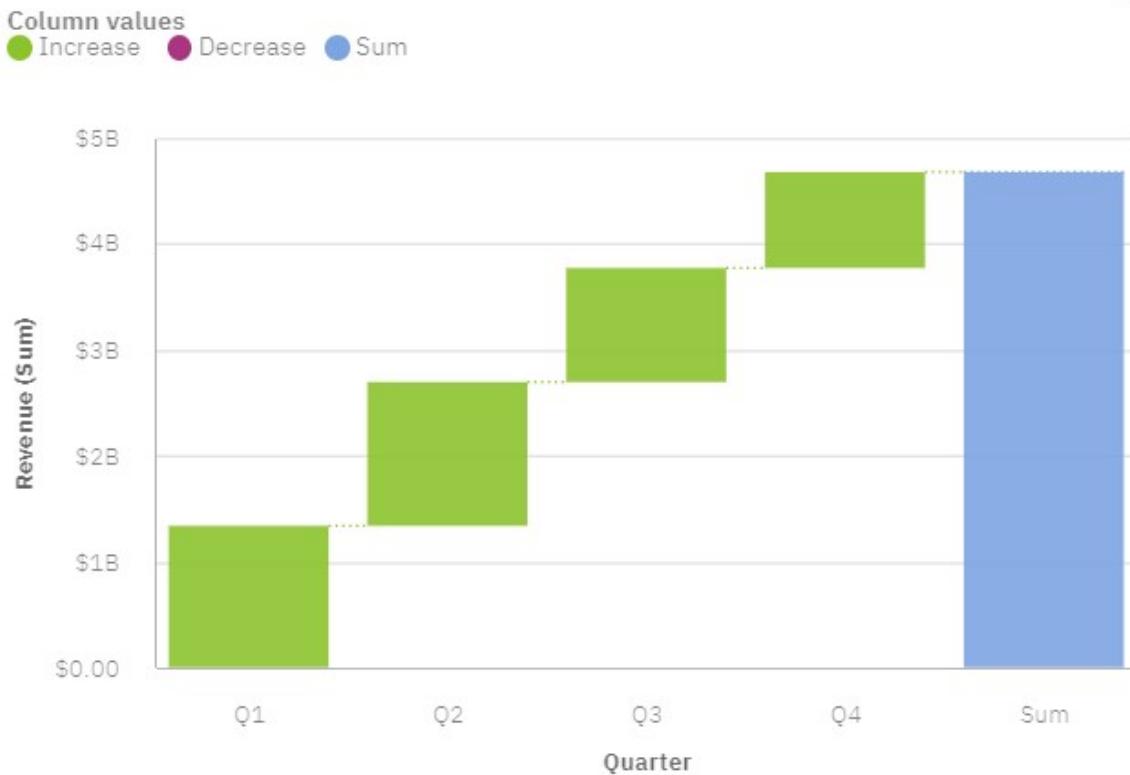
Use a waterfall visualization to understand the cumulative effects that a series of positive and negative values have on an initial value. The bars in a waterfall visualization are not total values.

A waterfall visualization shows how an initial value is increased and decreased by a series of intermediate values, leading to a final cumulative value shown in the far right column. The intermediate values can either be time-based or category-based.

Some examples of waterfall visualizations are as follows:

- Viewing the net income after you add the increases and decreases of revenue and costs for an enterprise over a quarter.
- Cumulative sales for products across a year with an annual total.

The following waterfall visualization shows the revenue delta by quarter.



The preceding waterfall visualization uses data from the Sporting Goods Company source. To recreate this visualization, complete the following steps:

1. From a dashboard, click **Visualizations** and select **Waterfall**.
2. Click **Sources** and from **Team content**, open **Samples > Data > Sporting Goods Company**.
3. Move the following data sets from the **Policy Holders** section to the indicated fields:
 - Drag **Quarter** onto the **x-axis** field.
 - Drag **Revenue** onto the **y-axis** field.
4. Set the properties for the Delta data item. Click the **Actions** icon then set the following options under the **Format > Currency** section:
 - **Abbreviate**
 - **Currency**: Default
 - **Currency display**: Default
5. Set the properties for the appearance of the visualization.

Click the **Properties** icon

In the **Visualization** tab, you can set column color options, axis, legend position, and chart properties.

For this example, set these options:

- **Total column positive color**: #8DC945
- **Show legend**: Off

In the **General** tab, you can set appearance, layout, position, and size.

Note: Size properties are set in percent if the **Dashboard > Canvas > Layout positioning** property is set to **Relative**, and in px if **Layout positioning** is set to **Absolute**. To find out more, see “[Setting up the page in a dashboard](#)” on page 11.

When you are done, click the **Properties** icon



to close the **Properties** pane.

Sub-categories

You can use sub-categories in waterfall visualizations to display how categories are build up.

While in edit mode, drag **month** onto the **Sub-categories** field.



You can see how the revenue of each month contributes to the quarters.

Showing the sub-categories totals by category or cumulative

You can display the total of the sub-categories by category or cumulative.

While in edit mode, click the **Properties** icon . In the **Visualization** tab, click **Chart > Sub-category totals**. From the menu, select either **By category** or **Cumulative**.

Column values
Increase Decrease



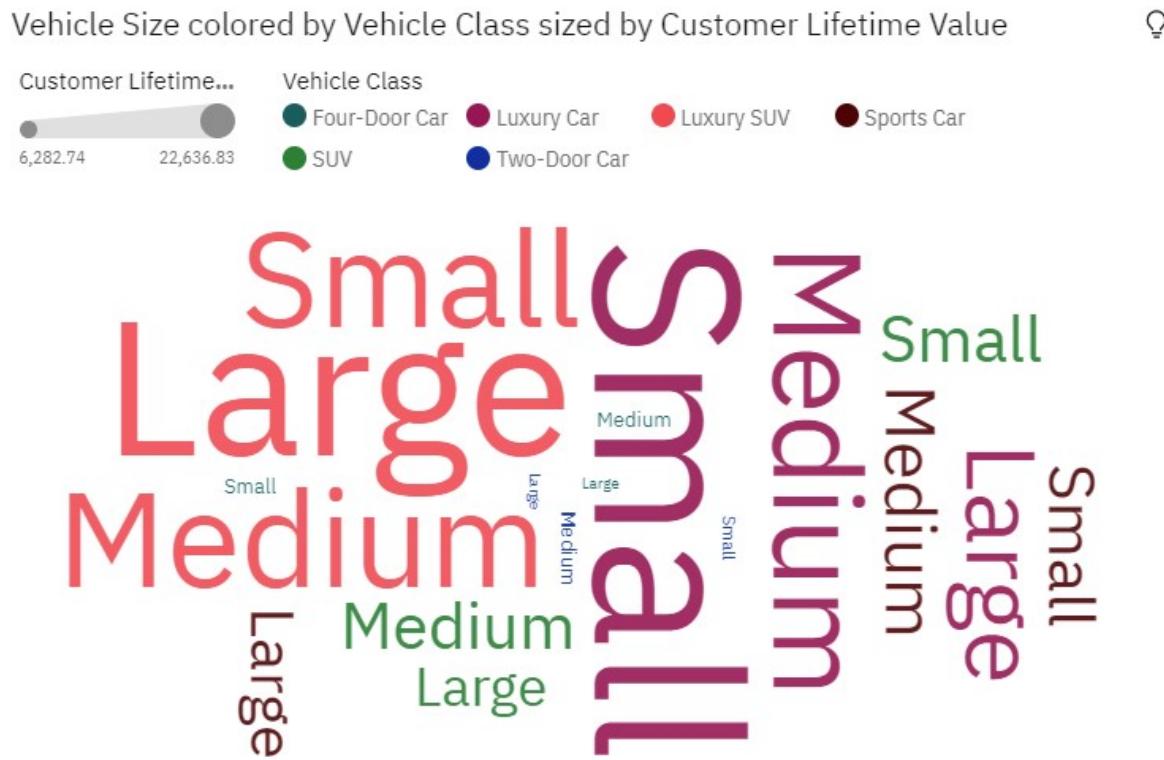
You can see how the cumulative totals in revenue of each quarter contribute to the year.

Word cloud

Use a word cloud visualization when you want to see a text-based visualization of a column. The text height represents the scale. The name itself is the different members of the column.

Tip: The data asset should contain at least 15 columns and at least 100 rows to create an effective word cloud.

For example, this word cloud visualization shows the customer life time value by vehicle size and class.



The word cloud was created by dragging the following data items from the Sources panel:

- Drag **Vehicle size** type onto the **Words** field.
- Drag **Average CLTV** onto the **Size** field.
- Drag **Vehicle class** onto the **Color** field

Samples

You can see an example of a word cloud visualization in the sample dashboard **Auto group executive dashboard**. You can find the sample here: **Samples > By industry > Automotive > Dashboards > Auto group executive dashboard**.

If any of the sample objects are missing, contact your administrator.

Using a different visualization type

Visualizations communicate comparisons, relationships, and trends. They emphasize and clarify numbers. To choose a visualization type, consider what you want the visualization to illustrate and what will appeal to the audience for the visualization.

Procedure

1. Select the visualization that you want to work with.
2. Click the **Change visualization** icon  in the toolbar.

3. Click the visualization type that you want to use.

Take a look at how each visualization type communicates data differently. For example, use a bar, column, or line visualization to compare a set of values. Use a line or area visualization to track relationships. Use a tree map or pie visualization to see the parts of a whole.

4. If you select a visualization type that requires different fields to be used, add a column to each empty field that has an asterisk (*) in it.

Insights in visualizations

IBM Cognos Analytics provides analytic insights that help you to detect and validate important relationships and meaningful differences based on the data that is presented by the visualization.

Insights are available by clicking the **Insights** icon  or the **Analytics** tab in eligible visualizations.

Note: Insights are available only for packages and are not supported in visualizations for data modules containing a Planning Analytics cube.

When you turn on insights, the summary appears in the **Insights** box and related visualization elements are highlighted and details are provided in the corresponding tooltip message. You can control each available insight separately.

Procedure

1. In a visualization that supports insights, click the **Insights** icon  or the **Analytics** tab.
2. Enable **Insights**.
3. Depending on the visualization, the following insights are shown:
 - **Average** Provides the mean of the displayed target value.
 - **Predictive strength** Shows the predictive strength of the relationship between the target and explanatory fields.
 - **Fit line** Shows when either a linear or quadratic relationship exists between the target and explanatory fields.
 - **Meaningful differences** Shows values that are most significantly higher or less than the average or trend.
 - **Most frequent** Shows values that are most frequently reported.

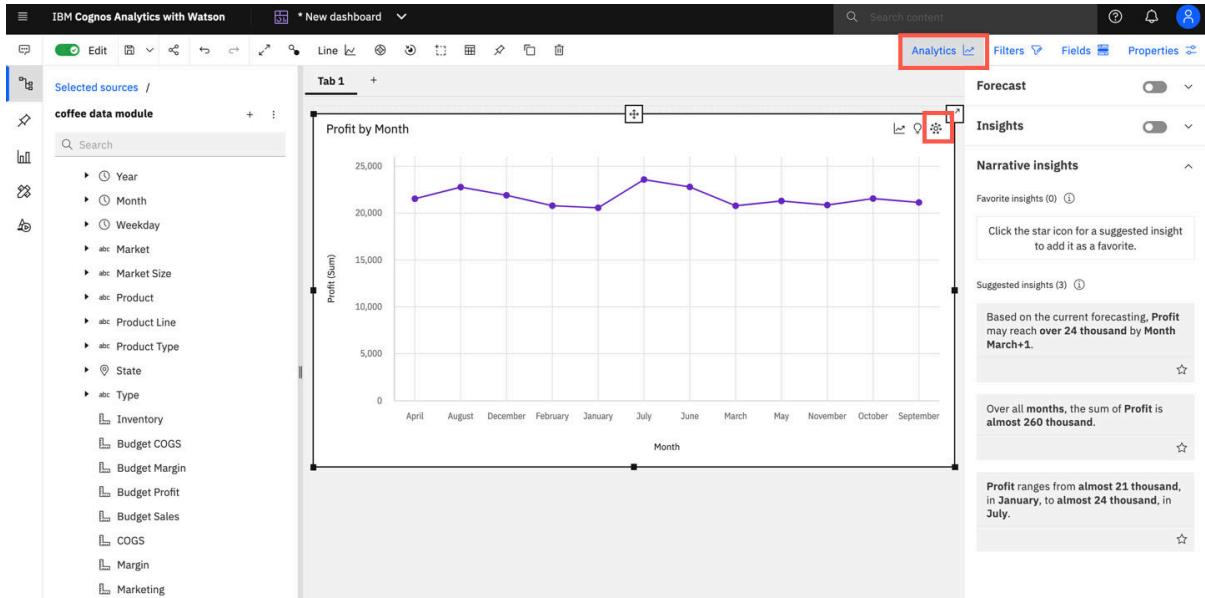
Narrative insights in visualizations

You can view narrative insights in dashboard visualizations that help you see meaningful aspects of the chart's data in natural language. When you generate narrative insights, you can highlight the insights that are of interest to you and share them with other users.

Narrative insights are auto-generated and can even use data from outside the visualization (such as other measures, categories, or time dimensions) to draw conclusions, explain and highlight potential drivers or underlying causes, or further breakdown data.

To see narrative insights in a visualization:

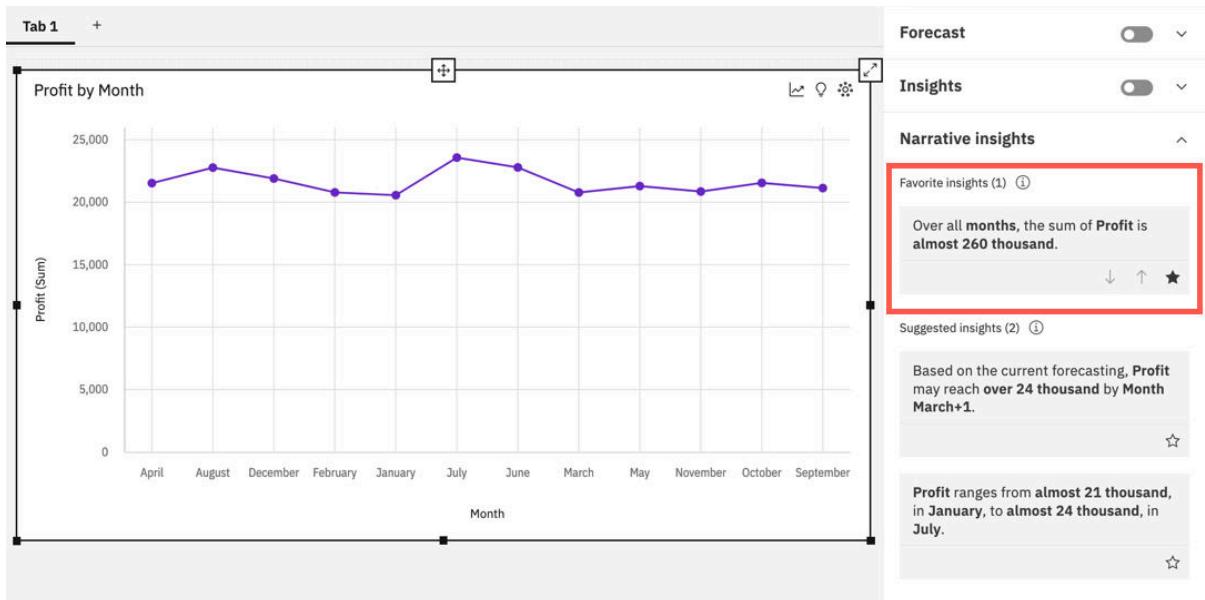
1. Click the **Narrative insights** icon in the visualization, or click **Analytics** to open the **Analytics** panel.
- Note:** Narrative insights are not supported in the Crosstab and Table visualizations.
2. Expand the **Narrative insights** section to see the narrative insights for your visualization.



Dashboard authors can mark a narrative insight as a favorite by clicking the star icon in the insight. Favoriting an insight lets you highlight the insight and share it with other users.

Important: You need to save the dashboard for other users to see the insights you marked as favorite.

You can also choose the order in which your favorite insights display.



Only dashboard authors can make changes to their favorited insights. For example, dashboard authors can add or remove an insight from favorites, and rank the insights in the order they want them to display. Other users that consume the dashboard, can view favorited insights and also see up to three additional insights that are suggested by Cognos Analytics for the dashboard.

Narrative insights

The dashboard author has favorited these insights.

Over all months, the sum of Profit is almost 260 thousand.

Suggested insights (2) ⓘ

Based on the current forecasting, Profit may reach over 24 thousand by Month March+1.

Profit ranges from almost 21 thousand, in January, to almost 24 thousand, in July.

Narrative insights are dynamic and change as the data in the visualization changes. If the data in the visualization changes, narrative insights that are no longer relevant, do not display.

Favorited insights that do not apply to the current data are also hidden from the view. However, if the data changes back to where the hidden favored insights are relevant again, these insights will display in the favored insights section again.

Importing a custom visualization in a dashboard

You can import custom visualizations in your IBM Cognos Analytics dashboard.

About this task

For more information, see the *Developing custom visualizations* documentation in the *IBM Cognos Analytics Custom Visualizations Developer Guide*.

Procedure

1. Create a dashboard.
2. Click the **Visualization** icon  in the toolbar.
3. Click the **Custom** tab.
If there are no custom visuals available, then you can add a custom visual via the **Add a custom visual** icon on the **Custom** tab.

4. From the **Custom visuals** pane, select the custom visualization that you want to use.

Forecasting in visualizations

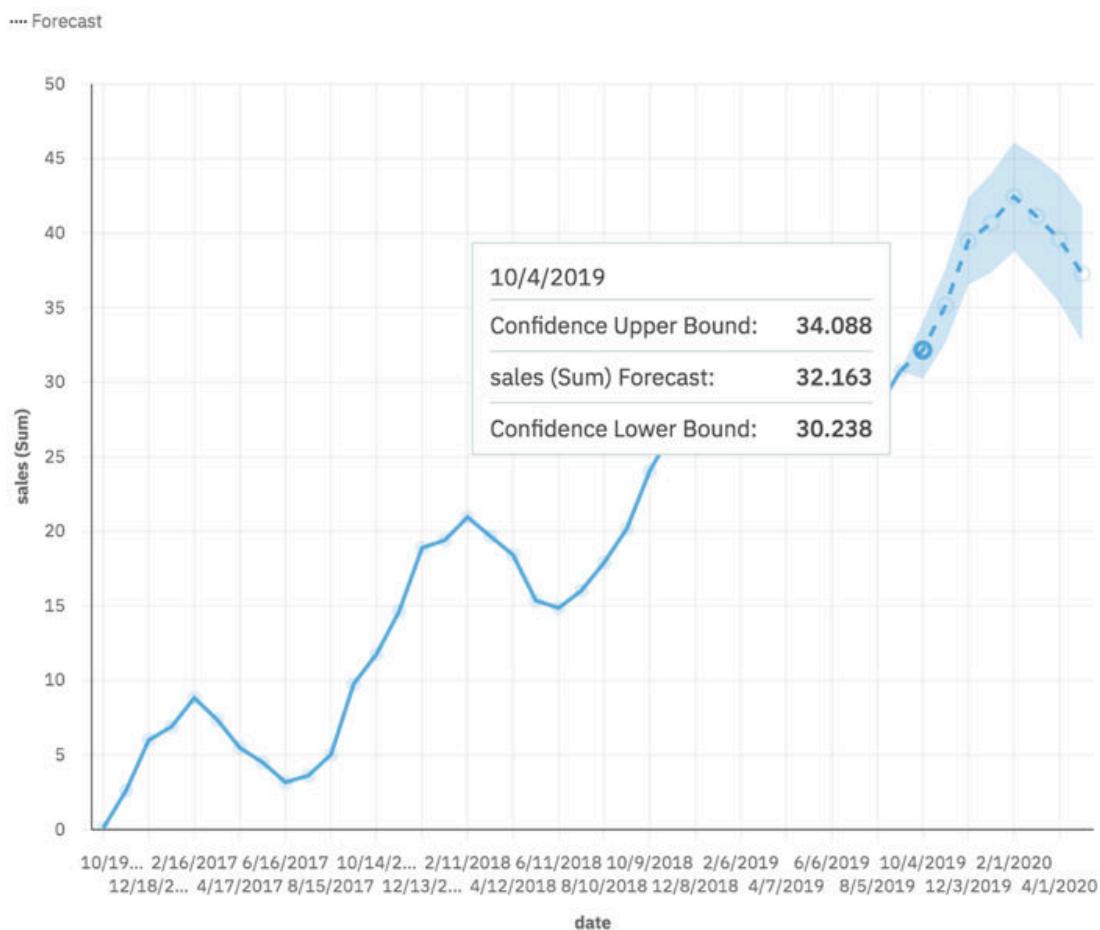
The forecasting feature provides time series data modeling and forecasts based on data presented in corresponding visualizations.

The forecasting feature is controlled by the **Forecast** dialog box available at the right corner of each eligible visualization. A visualization is eligible if both the visualization type and specified data are supported for forecasting.

Note: Support for forecasting is available for packages only and is not available in data modules containing a Planning Analytics cube. However, you can use the forecasting feature with a Planning Analytics cube if you create an enriched package from the cube. For more information, see [Creating an enriched package from a Planning Analytics cube](#).

When the **Forecast** dialog box is available and the feature is turned on, appropriate time series models are estimated and computed forecasts are displayed in the visualization. The **Forecast** dialog box contains user controls to assist in generating suitable models, forecasts, and corresponding confidence bounds. All results are updated when any of the controls are adjusted. While forecasts and confidence bounds are displayed or available in the visualization, the corresponding time series model's specification and data processing summary are available in Forecasting statistical details found in the data tray below the visualization.

The tooltip corresponding to a future value displays the corresponding time point, the forecast value, as well as upper and lower confidence bounds for the forecast value. Forecasting values and confidence bounds appear in a visualization.



Procedure

1. In a visualization that supports forecasting, click the **Forecasting** icon
2. Depending on the visualization, the following forecasting options are shown:

Forecast periods

The number of steps to forecast ahead.

The default value is **Auto**, which is 20% of the length of the historical data. Any missing values at the end of a particular series will also be forecast, but they will not count towards the specified number of forecast periods.

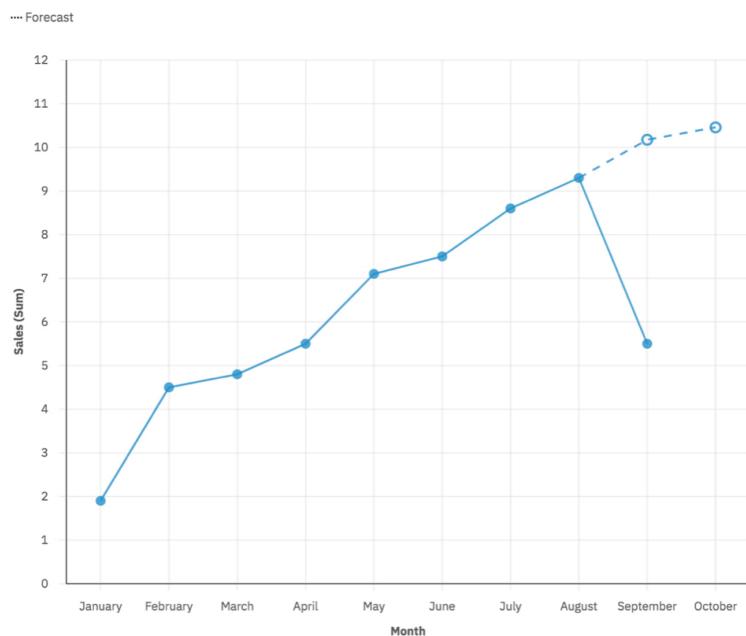
Ignored last periods

Ignores a specified number of data points at the end of a time series when building the model and computing the forecasts. Any missing values at the end of a non-ignored portion of a series will also be forecast. Ignored last periods value must be specified as a non-negative integer, such as: 0, 1, 2, 3.

The default value is 0. If there are no missing values, then all of the historical data is used in model generation and the first forecast point is after the last historical data point. Up to 100 data points can be ignored.

Ignoring the last data period can be useful when the data is incomplete. For example, you might be doing a forecast halfway through a month. Exclude this month from the forecast by setting **Ignored last periods** to 1.

The following visualization shows a forecast that ignores September's results by setting **Ignored last periods** to 1.



Confidence level

The certainty with which the true value is expected to be within the given range. You can see corresponding confidence interval in a tooltip by hovering over any forecast value. The confidence interval is displayed as upper and lower bounds.

You can select 3 different confidence levels: 90%, 95%, and 99%. The default is 95% and the lower and upper bound define the range at which you can be 95% confident that the true value lies within that range.

Seasonal period

The seasonality with which to build the model. Seasonality is when the time series has a predictable cyclic variation. For example during a holiday period each year.

The default value is **Auto**. **Auto** automatically detects seasonality by building multiple models with different seasonal periods and choosing the best one.

You can specify seasonality by entering a non-negative integer, such as: 0, 1, 2, 3 as the seasonal period.

To specify a non-seasonal model, set the **Seasonal period** to 0 or 1. A model with user specified seasonality is displayed only if the seasonal model is more accurate than all of the non-seasonal models

Recommended visualizations

IBM Cognos Analytics provides a number of recommended visualizations based on the data that you are working with.

Using a machine learning pipeline that is derived from training data and the input from visualization specialists, Cognos Analytics matches your data with the visualizations that illustrates your data.

When you drag a measure or column on to the canvas, Cognos Analytics chooses a recommended visualization for you. You can change it by selecting another visualization from either **Recommended** or from **More**.

Highlighting conditionally formatted data with color

Use color in your table or crosstab visualizations to see the distribution of your data and highlight exceptional data points. For example, you might want to highlight low sales numbers in red, or use green to highlight sales numbers over a certain threshold.

Before you begin

Depending on the data that you are using and the outcome that you want, you can use several different ways to define thresholds for conditionally highlighting your data in tables and crosstabs.

When you choose a measure to apply conditional formatting to, you can base the conditionality on the measure itself or a related measure of your choosing. Then, you can decide whether you want the evaluation to be based on a numeric value comparison or a percentage comparison. If you choose the Numeric scale, you get a simple comparison of the number value for each row against the rules you define for the comparison. For example, greater than 100 highlights as green and lower than 50 highlights as red. If you choose the Percentage scale, then the measure you selected for conditional formatting is divided by the number you select in the Color By setting for your conditional rules. If the Color By measure matches the measure you are conditionally formatting, the result is always 100% because you are dividing the number by itself.

The following scenarios illustrate common use cases for defining conditional formatting rules. To try the procedures yourself, you can use one of the data samples such as the GO data warehouse (query) sample.

Comparing a measure to static values

In this scenario, you have a value in your data source and you want to classify your result against hard targets. For example, you want to evaluate your revenue result with an arbitrary target of \$150 million. If you meet or exceed \$150 million, color the cells green. Likewise, if you achieve between \$20 million and \$150 million, then color the cells yellow. If your revenue is less than \$20 million, then color the cells red.

Procedure

1. Select a crosstab visualization and click the **Properties** tab .
2. In the **Conditional color** section of the **Visualization** tab, click the name of data under **Available data** to open the **Conditional data: Name of data** pane.
3. From the **Scale** list, select **Numeric**.
The default setting is a comparison of the measure to itself with a percentage scale.
4. Complete the following steps to create a rule:
 - a) Under **Rules**, select **Add rule**.
 - b) Under **If value is**, select **Greater than or equal to**.
 - c) Type **150,000,000**.
 - d) Under **Rule style**, set the text color, fill color, and indicator to match your preferences.
The default rule style is to color the text green with an **Arrow up** icon indicator.

The screenshot shows the Tableau Conditional Color palette dialog for the 'Revenue' field. The current rule is 'Conditional color: Revenue'. The rule is set to 'IBM conditional palette 1' with three color swatches (green, yellow, red). The 'Color By' dropdown is set to 'Revenue' and 'Scale' to 'Numeric'. The 'Rules' section shows a single rule: 'If value is Greater than or equal to 150,000,000'. The 'Rule style' section shows 'Text color' as #31A8B6 and 'Fill color' as No color. An 'Indicator' dropdown is set to 'Arrow up'. A checkbox for 'AND' is checked. A 'Delete rule' button is at the bottom right.

| Revenue | 2010 | 2011 | 2012 | 2013 | Summary |
|--------------------------|-----------------------|-------------------------|------------------------|-------------------------|-------------------------|
| Camping Equipment | \$32,986,338.06 ↑ | 402,757,573.17 ↑ | 500,582,422.83 ↑ | 352,910,329.97 ↑ | 1,589,036,664.03 |
| Golf Equipment | 153,553,850.98 ↑ | 168,006,427.07 ↑ | 230,110,270.55 ↑ | 174,740,819.29 ↑ | 726,411,367.89 |
| Mountaineering Equipment | (no value) | 107,099,669.94 | 161,039,623.26 ↑ | 141,520,649.7 | 409,660,132.9 |
| Outdoor Protection | 36,165,521.07 | 25,005,574.08 | 10,940,175.84 | 4,471,025.26 | 75,994,296.25 |
| Personal Accessories | 391,647,093.61 ↑ | 486,323,365.9 ↑ | 594,009,408.42 ↑ | 443,693,449.85 ↑ | 1,885,673,307.78 |
| Summary | 914,352,803.72 | 1,159,195,590.16 | 1,495,891,100.9 | 1,117,336,274.07 | 4,686,775,768.85 |

5. Create a rule for the yellow values. Use the **Less than** condition and the **AND** option to add a **Greater than or equal to** condition to the rule. Select an appropriate **Indicator**, such as the right arrow icon.
6. Create a rule for the red values. Use the **Less than** condition and complete the rest of the rule. Select an appropriate **Indicator**, such as the **Arrow down** icon.

The screenshot shows the Tableau Conditional Color palette dialog for the 'Revenue' field. The current rule is 'Conditional color: Revenue'. The rule is set to 'IBM conditional palette 1' with three color swatches (green, yellow, red). The 'Color By' dropdown is set to 'Revenue' and 'Scale' to 'Numeric'. There are two rules: one for yellow values ('Less than or equal to 20,000,000' with 'Arrow right' indicator) and one for red values ('Less than 20,000,000' with 'Arrow down' indicator). The 'Rule style' section shows 'Text color' as #FF5500 and 'Fill color' as No color. A checkbox for 'AND' is checked. A 'Delete rule' button is at the bottom right.

| Revenue | 2010 | 2011 | 2012 | 2013 | Summary |
|--------------------------|-----------------------|-------------------------|------------------------|-------------------------|-------------------------|
| Camping Equipment | \$32,986,338.06 ↑ | 402,757,573.17 ↑ | 500,582,422.83 ↑ | 352,910,329.97 ↑ | 1,589,036,664.03 |
| Golf Equipment | 153,553,850.98 ↑ | 168,006,427.07 ↑ | 230,110,270.55 ↑ | 174,740,819.29 ↑ | 726,411,367.89 |
| Mountaineering Equipment | (no value) | 107,099,669.94 | 161,039,623.26 ↑ | 141,520,649.7 → | 409,660,132.9 |
| Outdoor Protection | 36,165,521.07 → | 25,005,574.08 → | 10,940,175.84 ↓ | 4,471,025.26 ↓ | 75,994,296.25 |
| Personal Accessories | 391,647,093.61 ↑ | 486,323,365.9 ↑ | 594,009,408.42 ↑ | 443,693,449.85 ↑ | 1,885,673,307.78 |
| Summary | 914,352,803.72 | 1,159,195,590.16 | 1,495,891,100.9 | 1,117,336,274.07 | 4,686,775,768.85 |

Evaluating a percentage against a static calculation

In this scenario, you have a percentage result, Gross Margin, in your data source that you're looking to conditionally color. You can use a numeric evaluation as you did in the previous scenario and create rules for the underlying source values such as 0.37 or 0.62. Or, you can create a dummy calculation

with a numeric expression of 1 that can be used to divide the underlying Gross Margin values to get the percentage variance.

Procedure

1. Click **Sources** .
2. Click the **More** icon *** on the **Selected sources** panel, and then click **Create calculation** .
3. In the **Create calculation** dialog box, type a name for your calculation such as DummyCalculation.
4. In the **Expression** field, type 1.
5. Click **OK**.
6. Select the crosstab visualization on your dashboard and click the **Properties** tab .
7. In the **Conditional color** section of the **Visualization** tab, click **DummyCalculation** under **Available data** to open the **Conditional data: DummyCalculation** pane.
8. From the **Color By** list, select **DummyCalculation**.
9. From the **Scale** list, leave the default as **Percentage**.
10. Click **Add rule**.
11. Under **If value is**, select **Greater than or equal to**, and then type 60% for the value.
Keep the default **Rule style** formatting.
12. Click **Add rule**.
13. Under **If value is**, select **Less than or equal to**, and then type 40% for the value.
14. Under **Rule style**, change the **Text color** to red and change the **Indicator** to a **Arrow down** icon.

The screenshot shows a Tableau dashboard with a crosstab visualization titled "Gross Margin for Year and Product Line". The visualization contains the following data:

| | 2010 | 2011 | 2012 |
|----------------------|------------|------------|------------|
| Camping Equipment | 35% ↓ | 37% ↓ | 38% ↓ |
| Golf Equipment | 46% | 47% | 50% |
| Mountaineering | (no value) | 40% ↓ | 40% ↓ |
| Outdoor Protection | 59% | 62% ↑ | 62% ↑ |
| Personal Accessories | 40% | 40% | 42% |
| Summary | 40% | 40% | 42% |

The properties pane on the right is set up for a "Conditional color: Gross Margin" rule. It uses the "IBM conditional palette 1" and "DummyCalculation" for "Color By". The "Scale" is set to "Percentage". The "Rules" section contains two conditions:

- "Greater than or equal to 60%" (with a value of 123) and "Text color #FF5050" (red).
- "Less than or equal to 40%" (with a value of 40%) and "Text color #FF5050" (red).

This procedure works because the underlying source value is divided by the value 1 in the **DummyCalculation** expression. For example, 0.37 divided by 1 returned as a percentage is 37%.

Coloring a measure based on the variance between two measures

In the previous scenario, you were conditionally highlighting the percentage value Gross Margin in your source data. The percentage calculation might not be included in your underlying model. You can automatically calculate the percentage variance between two measures in the conditional color settings. In this scenario, color your Revenue measure based on the percentage variance of Sales Target.

Procedure

1. Select a crosstab visualization and click the **Properties** tab
2. In the **Conditional color** section of the **Visualization** tab, click **Sales target** to open the **Conditional color: Sales target** pane.
3. From the **Color By** list, select **Sales target**.

The default setting is a comparison of the measure to itself with a percentage scale.

4. Complete the following steps to create rules:

- a) Under **Rules**, select **Add rule**.
- b) Under **If value is**, select **Greater than**.

c) Type 110%.

Keep the default **Rule style** formatting.

d) Click **Add rule**.

e) Under **If value is**, select **Less than or equal to**, and then type 110% for the value.

f) Under **Rule style**, change the **Text color** to red and change the **Indicator** to an **Arrow down** icon.

The screenshot shows a dashboard titled "Revenue and Sales Target for Year". The table contains data for the years 2010, 2011, 2012, and 2013, along with a summary row. The "Revenue" column shows values like 914,352,803.72 for 2010 and 1,117,336,274.07 for 2013. The "Sales Target" column shows values like 812,885,300 for 2010 and 1,023,006,840 for 2013. The "Revenue" cell for 2013 is highlighted in green with a green arrow up indicator, while the "Sales Target" cell for 2013 is highlighted in red with a red arrow down indicator. To the right of the table, two conditional formatting rules are displayed:

- Conditional color: Revenue**
 - If value is**: Greater than 110%
 - Rule style**: Text color #3ABB66 (green), Fill color No color, Indicator Arrow up ↑
- If value is**: Less than or equal to 110%
 - Rule style**: Text color #FF5050 (red), Fill color No color, Indicator Arrow down ↓

In this scenario, if you divided the first row Revenue value by the first row Sales Target value, the result is 1.12482. This result is a percentage return of 112% and is why Revenue in the first row is conditionally formatted as green.

Coloring a measure based on a benchmark calculation

In this scenario, highlight Revenue based on how it compares to Sales Target. If Revenue is greater, it is green. If Revenue is lower, it is red. To achieve this result, create a calculation that compares the two values and assigns values of 1 or 0.

Procedure

1. Click **Sources**

2. Click the **More** icon *** on the **Selected sources** panel, and then click **Create calculation** 
3. In the **Create calculation** dialog box, type a name for your calculation such as Revenue Benchmark.
4. In the **Expression** field, type the following text:

```
If  
([Sales].[Sales].[Revenue] > [Sales Target].[Sales Target].[Sales Target])  
then  
(1)  
else  
(0)
```

5. Click **OK**.
6. Select the crosstab visualization on your dashboard and click the **Properties** tab 
7. In the **Conditional color** section of the visualization tab, click **Revenue** under **Available data** to open the **Conditional color: Revenue** pane.
8. From the **Color By** list, select **Revenue Benchmark**.
9. From the **Scale** list, select **Numeric**.
10. Click **Add rule**.
11. Under **If value is**, select **Equal to**, and then type 1 for the value.
12. Under **Rule style**, change the **Indicator** to a **Checkmark** icon.
13. Click **Add rule**.
14. Under **If value is**, select **Equal to**, and then type 0 for the value.
15. Under **Rule style**, change the **Text color** to red and change the **Indicator** to an **X symbol** icon.

The screenshot shows a dashboard with a table visualization titled "Revenue and Sales Target for Year and Product Line". The table has columns for Revenue and Sales Target, grouped by Product Line under the year 2012. The data rows are:

| | Revenue | Sales Target |
|-------------------|----------------|--------------|
| Camping Equip... | 500,382,422.83 | 444,076,500 |
| Golf Equipment | 230,110,270.55 | 211,037,000 |
| Mountaineerin... | 161,039,823.26 | 141,916,800 |
| Outdoor Protec... | 10,349,175.84 | 11,825,200 |
| Personal Acces... | 594,009,408.42 | 523,697,600 |

To the right of the table, there are two conditional color rule panels. The first rule applies to values equal to 1, with a green text color (#3ABB66) and a checkmark indicator. The second rule applies to values equal to 0, with a red text color (#FF5050) and an X symbol indicator.

Grouping data

You can automatically group data into bins to organize and display all your data in one visualization.

About this task

Enable the **Auto-group** feature when there is too much data to display or anytime you want to group your data.

You can enable only one **Auto-group** per visualization.

Note: **Auto-group** can be applied to measures and to relational databases only. If you are using an OLAP package, the **Auto-group** option is not available.

Procedure

1. Open the **Fields** pane.
2. Select a measure from a non-measure field, click the **More** icon , and click **Auto-group**.
3. Click the toggle to enable **Auto-group**.
4. In the **Number of groups** field, type a number in the range of 5 - 100 to set how many groups to display.

Note: You might not see the exact number of groups that you set in the **Number of groups** field because when a group does not have a value, it is not displayed.

Value axis options

With the value axis options, you can modify the value axis on eligible visualizations.

About this task

The following options are available:

- **Value axis show zero origin**

With the option, **Value axis show zero origin** you can set if you want to show or hide the zero origin on the value axis.

- **Value axis tick interval**

With the option, **Value axis tick interval** you can set the interval on the value axis.

- **Value axis minimum value**

With the option, **Value axis minimum value** you can set the minimum value of the value axis.

- **Value axis maximum value**

With the option, **Value axis maximum value** you can set the maximum value of the value axis.

- **Align axes zero** (for the line and column visualization only)

With the option, **Align axes zero** you can set if you want the zero alignment position for the columns and lines to be on the same axes.

Procedure

1. Select the visualization and click the **Properties** icon .
2. On the **Visualization** tab, set the options.

Logarithmic scale

Logarithmic scales are useful when the data you are displaying is much less or much more than the rest of the data or when the percentage differences between values are important.

You can specify whether to use a logarithmic scale, if the values in the chart cover a very large range.

A logarithmic scale shows the base value of 10 raised to the power of a value. For example, 10 has a logarithm of 1 because 10 raised to the power of 1 is 10. 100 has a logarithm of 2 because 10 raised to the power of 2 is 100, and so on.

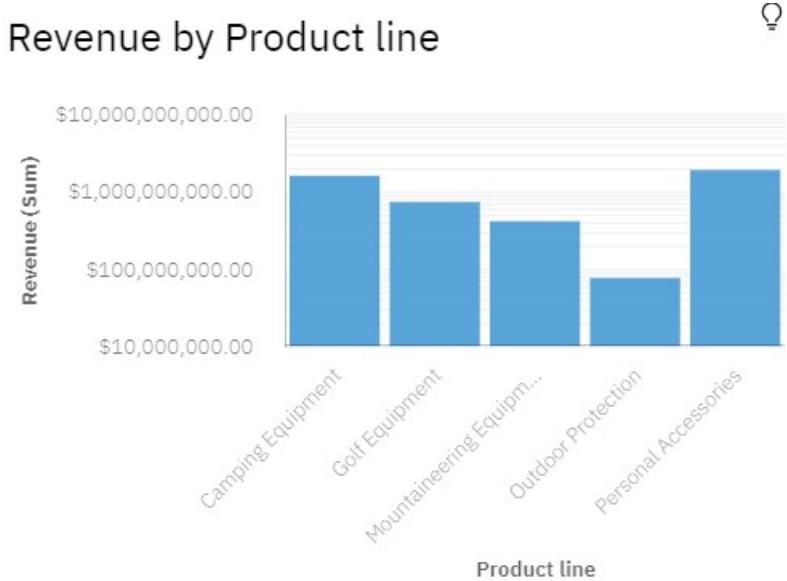
For example, the following chart is using a normal scale:

Revenue by Product line



In this chart, the Y-axis shows values up to 2,000,000,000 with evenly spaced intervals of 1,000,000,000. However, the Outdoor Protection column is so much less than the other columns that it is difficult to compare them.

The following is the same chart that uses a logarithmic scale:



In this chart, the Y-axis still shows the same revenue values, but the intervals reflect a logarithmic scale, which increases exponentially. You can now compare all the product lines because none of the product lines have much higher or much lower values than the others.

Logarithmic scales can also be useful when the percentage or ratio differences between values are important. For example, if the logarithmic scale chart above represents data from 2011, and you add data from 2012 as a second set of colored bars, you could see the differences between the 2011 revenue and 2012 revenue. In a logarithmic scale, differences between values on the Y-axis represent the same percentage for each bar. So if the 2011 and 2012 data differs by the same distance for each product line, you could deduce that your revenue went up by the same percentage for each product line. This would not be clear on a normal scale.

Procedure

1. Select the visualization.

2. In the **Properties** pane, under **Chart**, select the **Value axis logarithmic scaling** option.

Note: If you choose to use a logarithmic scale, ensure that your chart consumers know that the scale is logarithmic by including that information in the axis title or in a note on the chart.

Responsive option

Hides certain aspects of the visualization if the size is limited, to maximize the space that is available to display data.

Procedure

1. Select the visualization and click the **Properties** icon .
2. On the **Visualization** tab, click **Chart > Responsive**.

Creating data groups

You can organize column data into groups so that the data is easier to read and analyze. Create data groups directly in a dashboard without having to open the data modeling component.

About this task

Complete the following steps to create a group, see what columns are included in the group, edit the name of the group, or remove a group.

Note: Data groups can be applied to measures and to relational databases only. If you are using an OLAP package, the **Create data group** option is not available.

Procedure

1. Open a visualization that has a measure.
2. Click any white space in the visualization.
A toolbar appears.
3. Click the **Select tool** icon  in the toolbar.
4. Select the columns that you want to include in a group.

Tip: Alternatively, Ctrl+click one or more columns that you want to include in a group.

5. Ctrl+click one of the columns.
A menu appears.
6. From the menu, click **Create data group**.
7. Type a name for your data group and click **OK**.
8. To see what columns are included in a data group:
 - a) Ctrl+click the data group column on a visualization and click **Drill down**.
The separate individual columns that make up the data group are displayed.
 - b) To redisplay the data group as one column, Ctrl+click a column and click **Back**.

9. To edit the name of a data group:
 - a) Ctrl+click the data group column on a visualization and click **Create data group**.
 - b) Click **Rename**, type a name and click **Replace**.

10. To remove a data group:
 - a) Ctrl+click the data group column on the visualization and click **Create data group**.
 - b) Click **Ungroup**.

The data group is removed from the visualization.

Results

Your data groups appear in the data tray for the dashboard and in the fields for the visualizations that use the data groups. Data groups are not displayed in the **Selected sources** panel.

Showing or hiding rows and columns in a crosstab

Show or hide individual rows and columns in a crosstab and maintain the correct values in the **Summary** cells.

Procedure

1. Right-click on the row or column in a crosstab that you want to hide.
2. Select **Hide**.
A blue line is displayed to indicate that there are hidden values.
3. Double-click the blue bar to show the hidden values.
4. To show all of the hidden values, from the toolbar for a visualization, click the **Show all** icon .

Showing data as points in a visualization

Use the **Points** data slot to show the data for each of the values in a column as a point in the visualization.

Procedure

1. Click a visualization that has a **Points** data field.
2. Click the **Fields** icon  to open the **Fields** pane.
3. Drag the measure that you want to show the points for to the **Points** data field.

Showing data as sizable points in a visualization

Use the **Size** data slot to include the values of a column by setting the size of each point in the visualization.

Procedure

1. Click a visualization that has a **Size** data field.
2. Click the **Fields** icon  to open the **Fields** pane.
3. Drag the measure that you want to show the points for to the **Size** data field.

Showing additional data values in tooltips

Use the **Tooltip** data slot to display additional measures when hovering over a point in the visualization.

About this task

Add additional data items into the **Tooltip** data slot as measures. These data items display as tooltips when hovering over a point in the visualization.

Some visualizations have multiple **Tooltip** slots for multiple data sets, and some do not have any **Tooltip** slots.

For example, the line and column visualization has one **Tooltip** slot for the line and one tooltip slot for the column, while the bullet visualization does not have any **Tooltip** slots.

You cannot add a measure to the **Tooltip** data slot if the measure is already used in the visualization. The dashboard ignores such measures as redundant items. If you need to display the measure again with a different data format, use a calculation and give it the appropriate data format.

Procedure

1. Click a visualization that has a **Tooltip** data field.
 2. Click the **Fields** icon  to open the **Fields** pane.
 3. Drag the one or more measures with the corresponding values you want to show to the **Tooltip** data field.
- You can also click an empty **Tooltip** data field and select the measures that you want to display.

Showing labels in visualizations

You can show value and item labels in some visualizations so that the data values and items are clearer.

Procedure

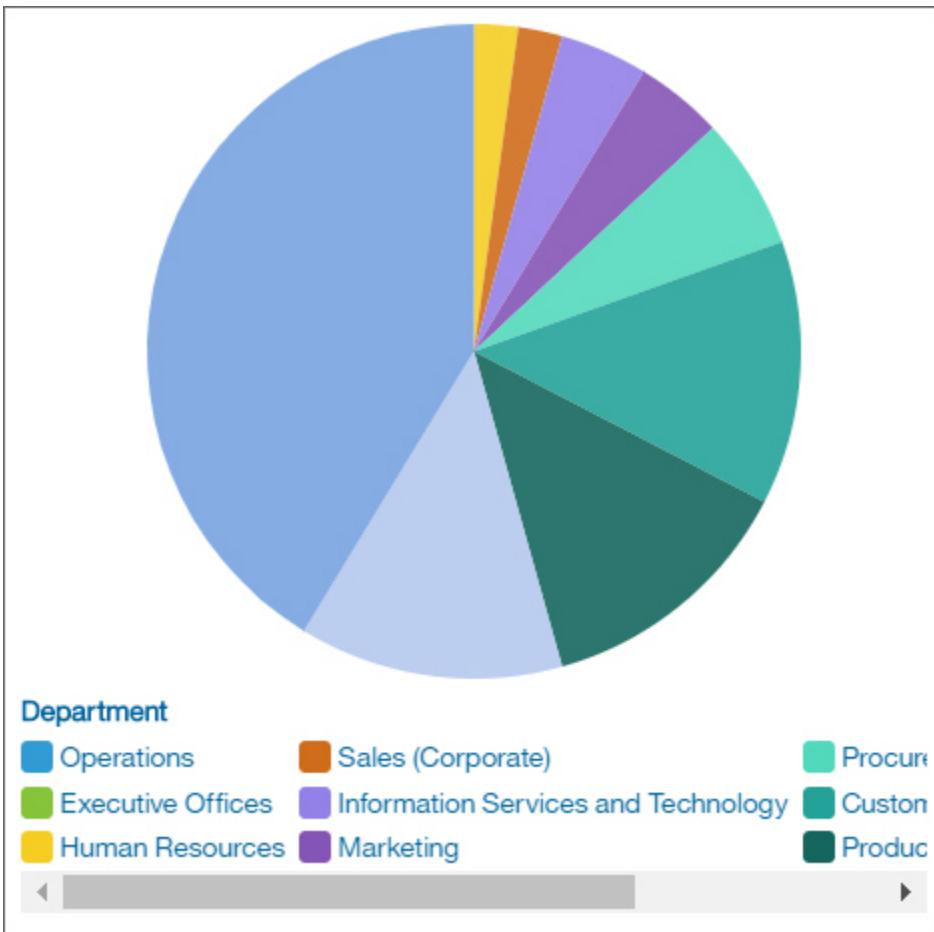
1. Click the visualization.
 2. Click the **Properties** icon .
- If you don't see the **Properties** icon, click the **Switch to edit** icon .
3. In the **Visualization** tab, under **Chart**, click the appropriate **Show ... labels** toggle.
 - For line visualizations, bar visualizations, and column visualizations, this is **Show value labels**.
 - For bubble visualizations and scatter visualizations, this is **Show item labels**
 - For line and column visualizations, this is **Show column value labels** for columns and **Show point value labels** for lines.

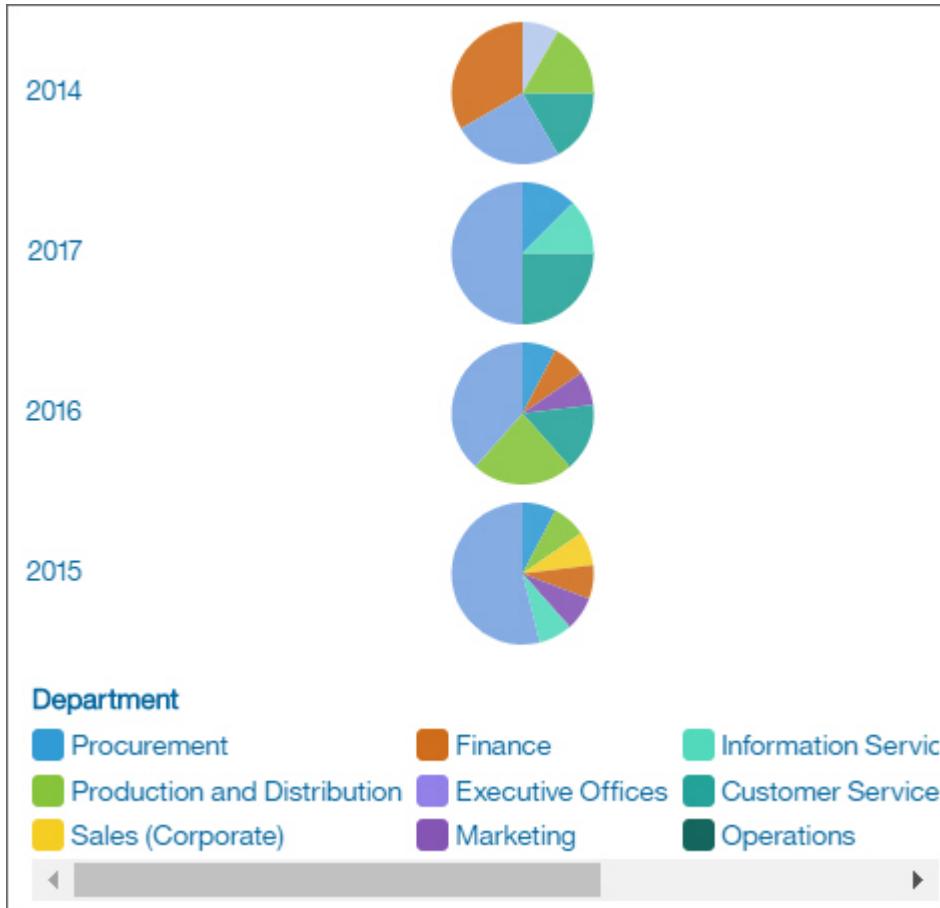
If you enabled the **Show ... labels** toggle, additional label formatting options display. You can specify any formatting options to customize the look and feel of your visualization labels.

Repeating a visualization by row or column

You can repeat a visualization for each member of a specified row or column.

For example, you have a pie visualization that shows the proportion of internal hires by department.





Procedure

1. To repeat the visualization horizontally, drag a column to the **Repeat (column)** data slot.

Note: There is a limit of 20 visualizations that can be shown. Use a filter if you want to control which members of the column appear in the repeating visualizations.

2. To repeat the visualization vertically, drag a column to the **Repeat (row)** data slot.

Suppressing null values in a crosstab or table

If you are using an OLAP package, you can suppress null cells in your tables and crosstabs.

About this task

Null suppression is enabled by default. When null suppression is enabled and an entire row or column contains all null values, the row or column is not displayed. When only some cells in your visualization are null, individual null cell values are displayed as **(no value)**. When null suppression is turned off, null cell values are displayed as **(null)**.

Procedure

1. Click the table or crosstab that contains null values.
2. Click the **Properties** icon

If you don't see the **Properties** icon, click the **Switch to edit** icon

3. In the **Visualization** tab, under **Chart**, select the **Suppression** toggle to enable or disable the setting.

Note: Alternatively, click the table or chart and click the **Suppression** icon in the toolbar.

Customizing null values

You can format how missing values are displayed in your visualizations.

About this task

This customization applies to all cells in a visualization.

Procedure

1. Right-click on the cell, table header, or bar in a visualization.
2. Click **Format data**.
3. Select a format from the list, such as **Text**, **Number**, **Percent**, or **Currency**.
4. In the **Missing value characters** field, type the value that you want to display for null values.
5. Click anywhere outside the **Format data** window to save your changes.

Customizing null values for lines

You can specify how lines display missing values in line visualizations and line and column visualizations.

About this task

This customization applies to all lines in a line visualization or a line and column visualization.

Procedure

1. Click the line visualization or line and column visualization that contains null values.
2. Click the **Properties** icon .

If you don't see the **Properties** icon, click the **Switch to edit** icon .

3. In the **Visualization** tab, under **Chart**, click the **Null values handing** dropdown and select one of the following values:

Interpolate

The line displays an interpolated value based on adjacent data points. This is the default selection.

Show as gaps

The line displays a gap between the adjacent data points.

Show as zero

The line displays missing values as zero.

Customizing unit labels

You can format how unit labels are displayed in your visualizations.

About this task

This customization applies to all cells in the column you apply the change to.

Procedure

1. Right-click on the cell, table header, or bar in a visualization.
2. Click **Format data**.
3. Select a format from the list, such as **Number** or **Currency**.
4. In the **Number label** field, type the value that you want to display for the formatted number.
5. In the **Label position** list, select **Default**, **Beginning**, or **End** depending on where you want to display the number label.
6. Click anywhere outside the **Format data** window to save your changes.

Setting a timer to automatically refresh a visualization

You can set a timer in individual visualizations to seconds, minutes, or hours to indicate how often you want the item to automatically refresh.

Procedure

1. Click the visualization or object.
2. Click the **Properties** icon .

If you don't see the **Properties** icon, click the **Edit** icon .

3. In the **Visualization** tab, under **Chart**, select the **Refresh automatically** toggle and set the refresh frequency to seconds, minutes, or hours.

The **Widget timer** icon  appears on the visualization.

Tip: Click the **Widget timer** icon  to see when the last refresh occurred.

Adding a title to a visualization

Add clarity by adding a title to any visualization.

Procedure

1. Click the visualization or object.
2. Click the **Properties** icon .

If you don't see the **Properties** icon, click the **Edit** icon .

3. In the **Visualization** tab, click **Chart > Title type**. Choose one of the following options:

- **Smart title** Data is used to display the title.
- **Custom title** You can specify the title.
- **No title**

Limiting data to top or bottom values in a dashboard visualization

You want to focus your visualization on the items of greatest significance to your business question. For example, you want to identify your top 100 customers and what that group of customers is worth.

You can limit the data to the top or bottom values of a set. Limiting keeps the amount of data that is shown in the work area small, even when you use large data sources.

You can define a top or bottom rule by specifying:

- A number, such as the 10 top or bottom performing sales people.
- A percentage, such as customers who contribute to the top 10% of overall revenue.

If the selected set contains a filter, then the top or bottom rule applies only to the included values. For example, if you apply a filter to show only retailers with revenue greater than 1.000.000 dollars, the bottom rule applies to the lowest values within those results.

You can filter a set of members to show only those members at the top or bottom and base the filter on the measure you are using.

Note: Tables in dashboards provide only summary totals for data measures that are aggregated by TOTAL when the top or bottom filter is applied. If it is possible, use a crosstab visualization in these cases.

Procedure

1. Click the **Edit** icon .

2. Right-click a column and click **Top or bottom**.
3. Select whether to filter the **Top count**, **Top %**, **Bottom count**, or **Bottom %** values.
4. In the **By** field, specify a member that you want to use for the top or bottom filtering.

Note: If individual data points have the same value, then the visualization shows all these values even if you specified a limit of, for example, 10 values.

Performing calculations on measures and creating new columns

If you want to compute with values that are the result of an aggregation, then you can create calculations based on measures.

For example, you can create a calculation by adding a fixed value to a measure. The following example adds 1 million to the Total Claim Amount measure.

You can use a calculation based on measures only in the dashboard where you created the calculation. Calculations are not stored with the data source.

Procedure

1. In a dashboard, click a visualization that contains a measure column.
2. Click the **Fields** panel to open it.
3. In the **Fields** panel, from the measure context menu , click **Create calculation**.
4. Specify a name for your calculation.
5. Define the calculation by using the appropriate mathematical operation, which can be addition (+), subtraction (-), multiplication (*), division (/), percentage (%), or percentage change (% change).

Note: If you want to define the calculation by using the Cognos Analytics expression editor, click **Use calculation editor**.

6. Use the **Calculate after aggregation** option to set whether the calculation is run before or after the data aggregation.
7. Click **OK**.

The calculation is added to a slot in the visualization as a new measure. This does not have to be the same slot as from where you created the calculation. If you want to add the calculated measure to the slot you created the calculation from, then drag the calculated measure to that slot.

Expanding hierarchies to display all members in the data tree

The data tree in a dashboard or exploration shows the content of relational and dimensional sources. In both relational and dimensional sources, members are shown in the data tree.

To view the content of a dimensional source, expand the package that contains the source items. Dimensional members are the nodes of the **Members** folder.

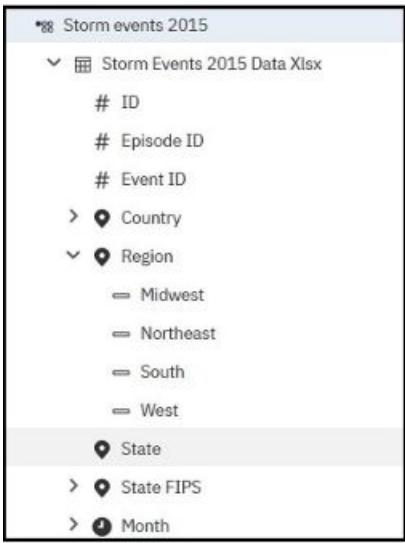
Relational members are the nodes of columns in relational sources.

You can initiate the search for members from the data tree, from the menu *** of hierarchies, levels, members, or columns. For more information, see the *Searching for members* topic in the *Data Modeling* guide.

Members in a data tree

Each unique value in a column is shown as a member in the data tree.

In the following sample data tree, the Region column contains the following members: Midwest, Northeast, South, and West.



Using maps

Maps help you to do geographic analysis of data by using locations such as states, regions, and postal codes.

Over 235,000 administrative boundaries and over 220,000 zip and postal codes in over 245 countries are supported.

Note: Due to a licensing restriction, street map data in maps powered by Mapbox is not available in Cognos Analytics for Japanese regions. You can still use Japanese maps. However, when you select a map layer that previously contained street map data, the street map data does not display for Japanese locations.

Legacy maps are unaffected by this change.

For a complete list of supported locations, follow these steps:

1. Go to https://github.com/IBM/ca_mapping_features/blob/master/README.md.
2. Follow the instruction in the README file.
3. There are spreadsheets available that contain the types of administrative and postal boundaries by country and spreadsheets that contain the names of the administrative boundaries by country.

Data is mapped by matching the location name on the map with a location in your data.

Dashboards have a limit of plotting or mapping a maximum of 3000 data points on any visualization.

Notice: If you encounter a problem with map rendering in Firefox browser on Windows, go to the topic [WebGL-related problem with maps in Firefox](#).

Adding a map to a dashboard

When you use a map in a dashboard, you can show data for one location measure, either as a filled region, a point, or both.

Before you begin

You must have access to the IBM Cognos samples. This procedure uses the IBM Cognos GO Sales sample data. If your administrator installed these samples, they are in **Team content > Samples > Models > GO Sales (query)**.

About this task

This procedure shows you how to create a map that shows revenue by region and gross profit as points.

Note: Other names for a map are *polygon*, *filled region*, and *choropleth*.

Procedure

Create the map and add revenue by region.

1. Click **New** and then click **Dashboard**.
2. Leave the default values in the **Select a template** window and click **OK**.
3. In the left pane, click the **Visualizations** icon  and then click the **Map** icon.
4. In the left pane, click **Sources**, and then click **Add a Source**.
5. Click **Team content > Samples > Models > GO Sales (query)** and click **Add**.
6. Expand **GO Sales (query) > go_sales > Sales (query) > Sales**, and drag **Revenue** to the **Location color** data slot.
7. Expand **Branch** and drag **City** to the **Locations** data slot.
The map is populated and a yellow triangle displays in the upper right corner of the map.
- Tip:** Zoom in and zoom out of the map to see more or less detail. Click and drag to move around the map.
8. Click the yellow triangle.
A window displays the unresolved locations information. There are two types of unresolved locations: ambiguous region and unrecognized location. To resolve the first problem, add categories to refine the locations. For example, add **Province or state** and **Country** to the **Location** data slot. To resolve the second problem, cleanse your data by renaming the locations.
9. To add points to the map, drag measures to the **Point size** and **Point color** data slots.
10. Save the dashboard when you're done.

Using latitude and longitude locations in a map

When you use a map in a dashboard, you can show data for multiple layers: regions, points, and latitude/longitude locations.

Before you begin

To use latitude/longitude locations in your map, use a data source that contains latitude and longitude data. For example:

| Table 1. Example table with latitude and longitude data | | | | |
|---|-----------|-----------|--------|---------|
| City | Longitude | Latitude | Rating | Surveys |
| Antwerp | 4.402771 | 51.260197 | 7 | 30.000 |
| Brussels | 4.355607 | 50.878899 | 9 | 76.000 |

At the top of the data slot pane, click the down arrow and select **Latitude/Longitude**.

Note: The format of the longitude and latitude data must be as follows: Lat 51.260197 , Long 4.402771. The format 51° 26' 01.97'' N , 4° 40' 2.771'' E is not supported.

Procedure

1. Click **New** and then click **Dashboard**.
2. Leave the default values in the **Select a template** window and click **OK**.
3. In the left pane, click the **Visualizations** icon  and then click the **Map** icon.
4. In the left pane, click **Sources**, and then click **Add a source**. Select a data source that contains longitude and latitude data.

5. In the visualization, expand and select **Longitude/Longitude**.
6. In the left pane, expand your data items and drag latitude and longitude to the **Latitude** and **Longitude** data slots.
7. Drag City to the **Label** data slot. The latitude, longitude, name of the city appears when you hover over the data points.
8. Drag rating to the **Size** data slot and drag Surveys to the **Color** data slot.

Setting up Mapbox to work with Cognos Analytics

IBM Cognos Analytics supports the use of custom polygons that come from Mapbox.

Create a free Mapbox account. When you have created your Mapbox account, upload your geoJSON custom polygon file to Mapbox as a tileset. If your geoJSON is less than 5 MB, then you can edit the geoJSON directly as a data set in Mapbox. After you edit the geoJSON files, export them into a tileset. Make sure that each polygon has at least one uniquely identifying property as a string value. For more information about tilesets, see the Mapbox documentation about a [tileset](#).

Custom polygons in formats such as .shp and KML can be converted to geoJSON, by using, for example QGIS.

Note: Due to a licensing restriction, street map data in maps powered by Mapbox is not available in Cognos Analytics for Japanese regions. You can still use Japanese maps. However, when you select a map layer that previously contained street map data, the street map data does not display for Japanese locations.

Legacy maps are unaffected by this change.

Retrieving data from Mapbox

When you have your tileset created in Mapbox, make note of the following information from the tileset page:

- Tileset Id (appears in the **Share & use** panel)
- Layer name (appears in the **Vector layers** panel)
- Property name (appears in the **name** field for the layer)

You specify these values when you want to use Mapbox data in your map.

Enter the Tileset ID into the field marked Tileset Id.

Best practices

- For increased performance and to make sure that polygons appear at zoom level 0 (world view), compress geoJSON files to less than 10 MB. A tool that can compress geoJSON files is <http://mapshaper.org/>.

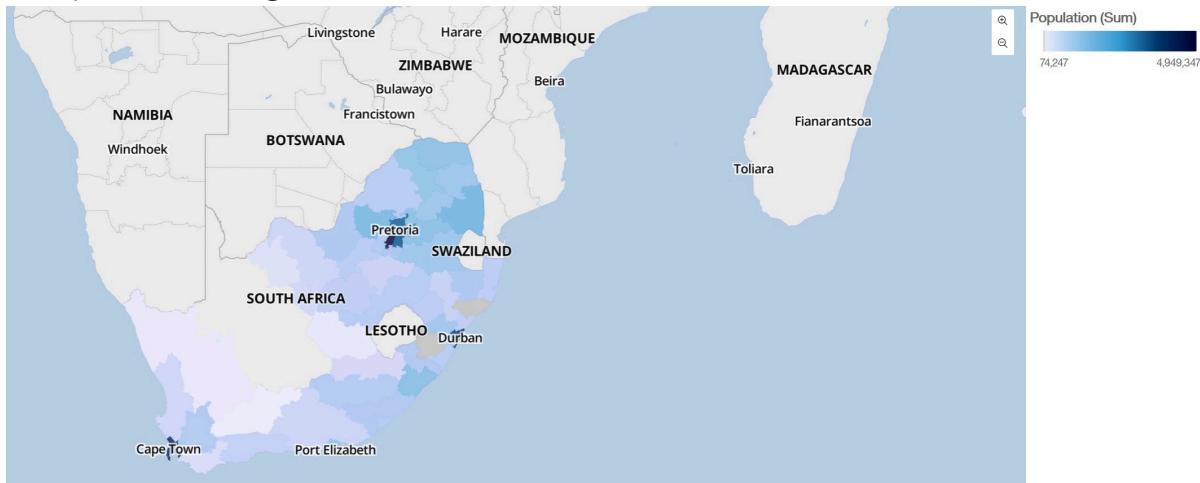
If your geoJSON files are larger than 10 MB, then Mapbox sets the default zoom to not start at worldview 0. If you want to manually change the zoom extents, there are few ways to do so:

- Tippecanoe APIs, which are available on Linux and Apple MacOs.
- Download Mapbox studio classic on your Microsoft Windows computer and change the minimum and maximum zoom levels.

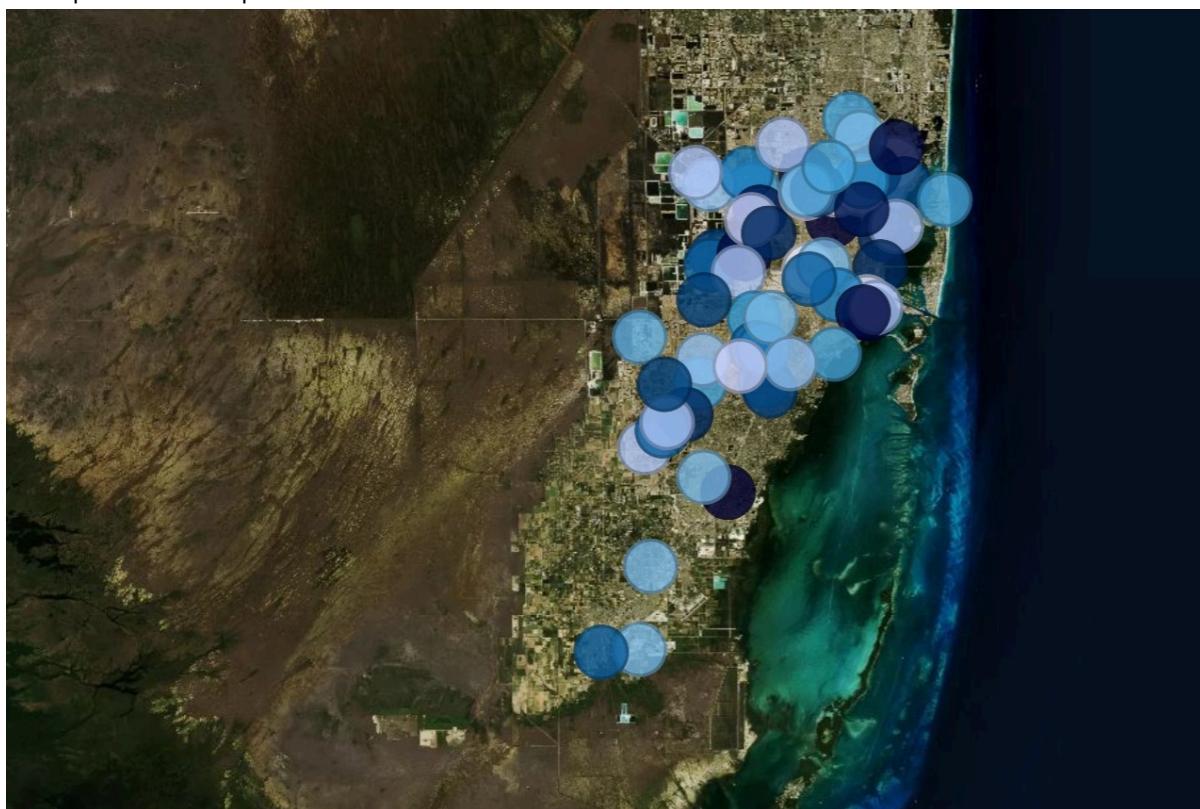
For more information, see <https://www.mapbox.com/help/adjust-tileset-zoom-extent/>.

- To ensure that auto-zoom works in IBM Cognos Analytics - Reporting set the unique polygon identifier as a string value.
- If you work with custom polygons in small areas, for example at postcode level, turning off auto zoom after the initial data loads. This results in a better experience when you filter because the map does not reset zoom and zoom in multiple times.
- Keep the Mapbox keys confidential.

Example of custom regions



Example of custom points



Using custom point or region information from Mapbox in a map visualization in a dashboard

When you use a map in a dashboard, you can use custom point or region information from Mapbox in a map. You can use an extra layer on a map to display additional information. For example, a time-zone layer.

Note: Due to a licensing restriction, street map data in maps powered by Mapbox is not available in Cognos Analytics for Japanese regions. You can still use Japanese maps. However, when you select a map layer that previously contained street map data, the street map data does not display for Japanese locations.

Legacy maps are unaffected by this change.

Before you begin

To use the vector maps from Mapbox as location measures in your map visualization, use a data source that contains region or point data. An example of a table with point or region data is the following table:

| Table 2. Table with point and region data | | | | |
|---|------------|----------------|-----------------|-----------|
| City | Population | Timezone | Timezone offset | TZ |
| Andorra la Vella | 20430 | Europe/Andorra | 1 | UTC+01:00 |
| Abu Dhabi | 603492 | Asia/Dubai | 4 | UTC+04:00 |

The tileset that Mapbox generates has the following properties:

- Custom Tileset Id
- Custom layer name
- Custom property name

Procedure

1. Create a Mapbox account.
2. Upload your geoJSON file to Mapbox.

Important: Before you upload any geoJSON file, ensure that its polygon properties do not contain any sensitive information.
3. In Mapbox, create a tileset based on the geoJSON file.
4. In IBM Cognos Analytics click **New** and then click **Dashboard**.
5. Leave the default values in the **Select a template** window and click **OK**.
6. In the left pane, click the **Visualizations** icon , and then click the **Map** icon.
7. In the left pane, click **Sources**, and then click **Add a Source**. Select a data source that contains that contains region or point data.
8. In the visualization, expand and select
 - **Regions**, if you want to use region data from Mapbox.
 - **Points**, if you want to use point data from Mapbox.
9. In the left pane, expand your data items and drag either point or region data to the **Location** data slot.
10. **Note:** Make sure you use the correct casing for the Mapbox properties.

Depending on whether you want to use Mapbox region or point data, specify the following properties. These properties are part of the Mapbox map. You must obtain the values of the properties from the Mapbox map creator.

From the **Properties** pane under **REGIONS**, specify the following properties:

| Option | Description |
|------------------------------------|---|
| Region custom Tileset Id | The Mapbox unique Tileset Id. |
| Region custom layer name | The layer name that is used in the Mapbox map. |
| Region custom property name | The custom property name that you want to use from the Map box map. |

From the **Properties** pane under **POINTS**, specify the following properties:

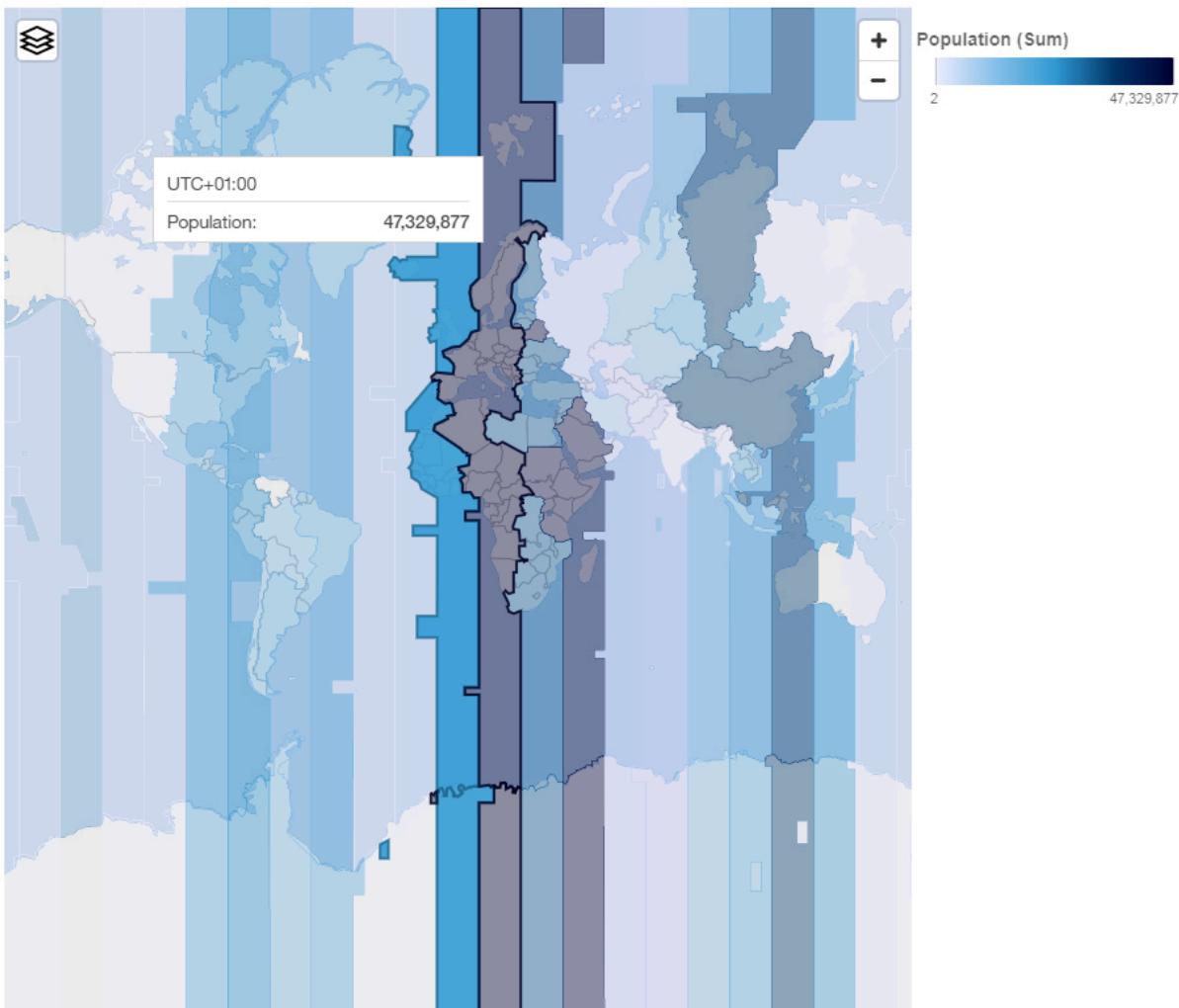
| Option | Description |
|--------------------------------|--|
| Point custom Tileset Id | The Mapbox unique Tileset Id. |
| Point custom layer name | The layer name that is used in the Mapbox map. |

| Option | Description |
|-----------------------------------|---|
| Point custom property name | The custom property name that you want to use from the Map box map. |

11. Drag measurable data to the **Location color** data slot.
For example, use population.

Example

An example of a map visualization with a region layer that shows the population for each time-zone. The layout of the time-zones is defined in a Mapbox map.



Cluster map layer in a map

When you use a map in a dashboard, you can interact with different map layers to customize how a map is displayed. You can group points on a map to help report users to better analyze data at different zoom levels. Map clustering is available as a property on both points and latitude and longitude layers.

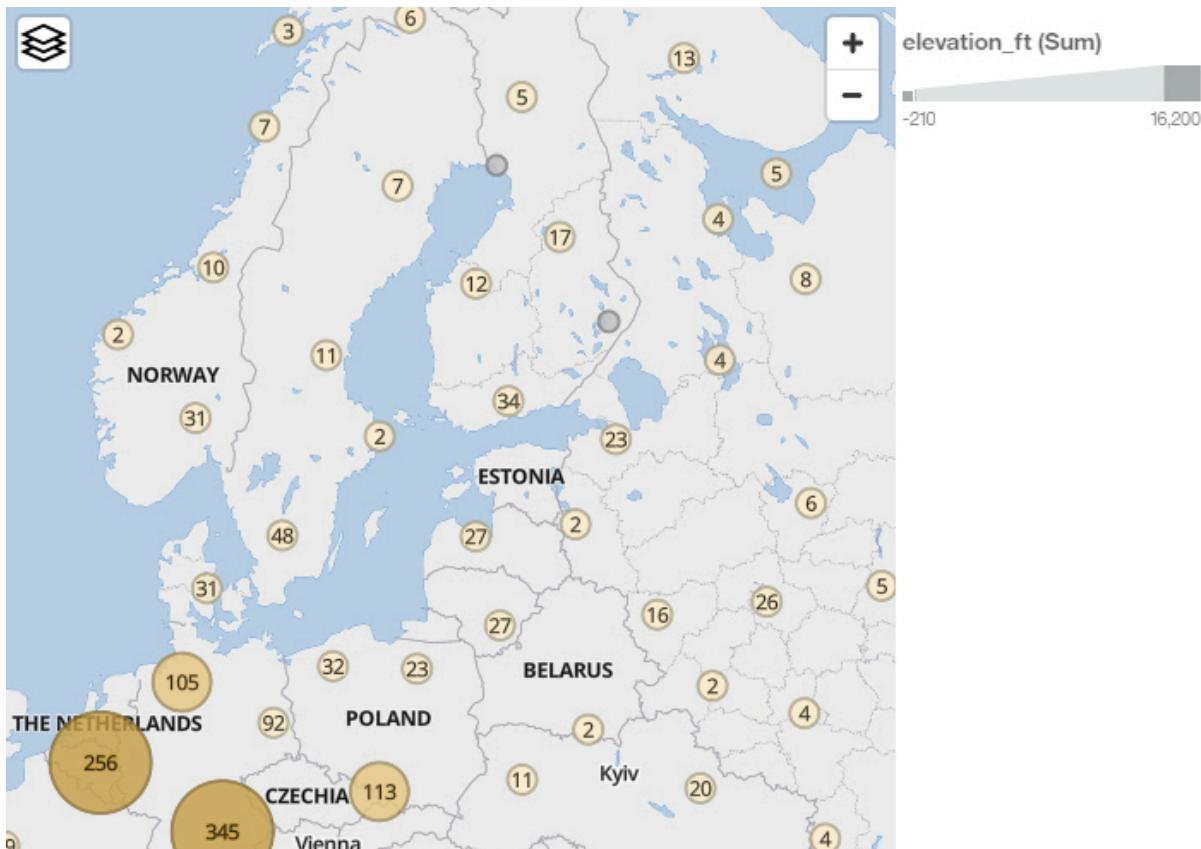
Procedure

1. Click the **Open menu** icon , and then click **+ New**.
2. Click **Dashboard**.
3. Leave the default template and click **Create**.

4. In the left pane, click the **Visualizations** icon , and then click the **Map** icon.
5. In the left pane, click **Sources**, and then click **Add a Source**. Select a data source that contains longitude and latitude data.
6. In the visualization, expand and select **Longitude/Longitude**.
7. In the left pane, expand your data items and drag latitude and longitude data to the **Latitude** and **Longitude** data slots.
8. Drag a measure to the **Size** data slot.
9. Click the **Show properties** icon , and open the **Latitude/Longitude layer** section.
10. From the **Type** menu, select **Cluster**.
11. Optionally you can change the heat palette with the **Heat palette** option and change the transparency with the **Transparency** slider.

Example

The following example shows latitude / longitude data that is combined with cluster as type. Locations with the same elevation are clustered.



Heat map layer in a map

When you use a map in a dashboard, you can interact with different map layers to customize how a map is displayed. You can visualize data by location that uses a heat map layer on a map. The heat map layer is available as a property on both points and latitude and longitude layers.

Procedure

1. Click **New** and then click **Dashboard**.
2. Leave the default values in the **Select a template** window and click **OK**.
3. In the left pane, click the **Visualizations** icon , and then click the **Map** icon.

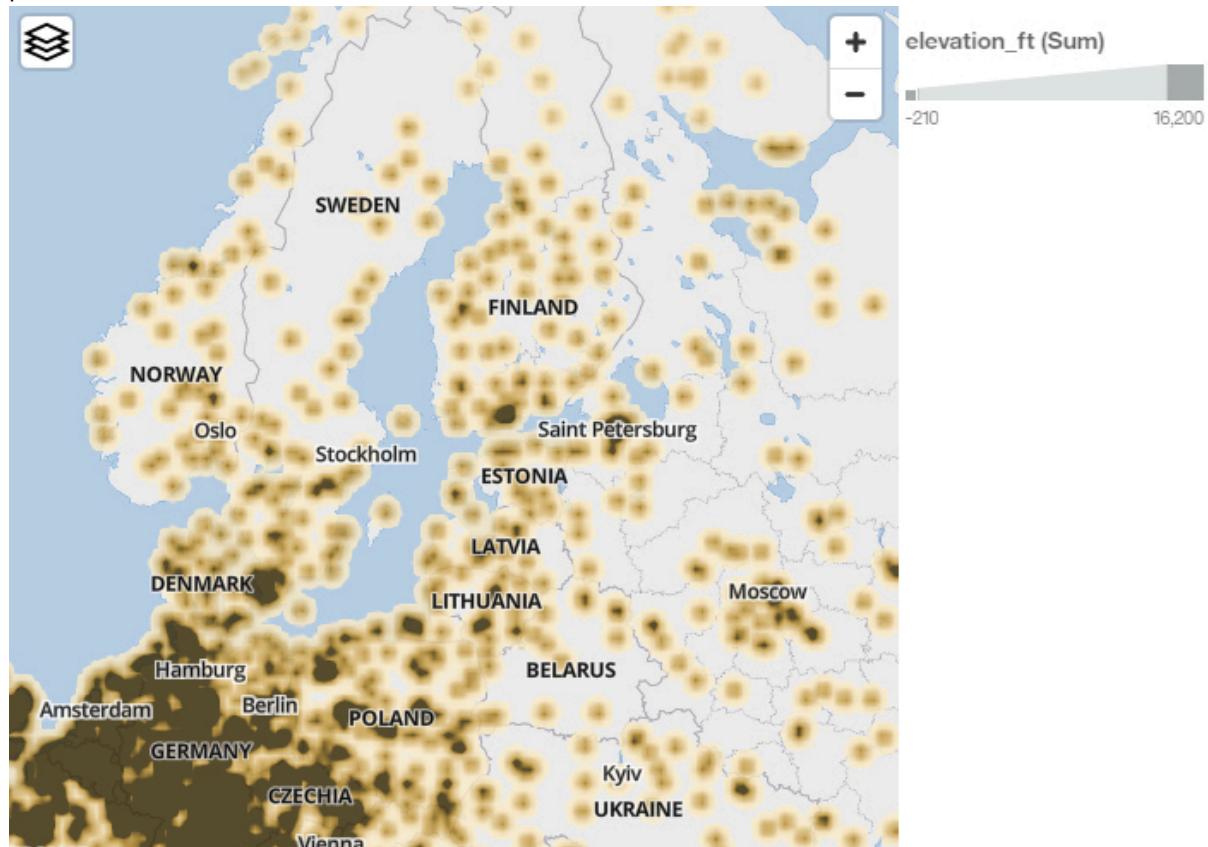
4. In the left pane, click **Sources**, and then click **Add a Source**. Select a data source that contains longitude and latitude data.
5. In the visualization, expand and select **Longitude/Longitude**.
6. In the left pane, expand your data items and drag latitude and longitude data to the **Latitude** and **Longitude** data slots.
7. Drag a measure to the **Size** data slot.
8. Click the **Show properties** icon , and open the **Latitude/Longitude layer** section.
9. From the **Type** menu, select **Heat**.
10. From the **Heat weight** menu, select one of the next options:

| Option | Description |
|----------------------|--|
| Equal | The size of the points is equal. |
| By color slot | The size of the points is controlled by the measurement in the color slot. |
| By size slot | The size of the points is controlled by the measurement in the size slot. |

11. Optionally you can change the heat palette with the **Heat palette** option and change the transparency with the **Transparency** slider.

Example

The following example shows latitude / longitude data that is combined with heat as type. The size of the points resembles the elevation of the locations.



Hexbin map layer in a map

When you use a map in a dashboard, you can interact with different map layers to customize how a map is displayed. You can visualize data by location that uses a hexbin map layer on a map. The hexbin map layer is available as a property on both points and latitude and longitude layers.

Hexbins calculate the quantity of points in the given radius. If you increase the value of the **Hex radius** property, you will display fewer hexbins. If you decrease the value of the **Hex radius** property, you will display more hexbins. You can also increase the **Maximum Hex extrusion height** property to make the high and low hexbins more distinct.

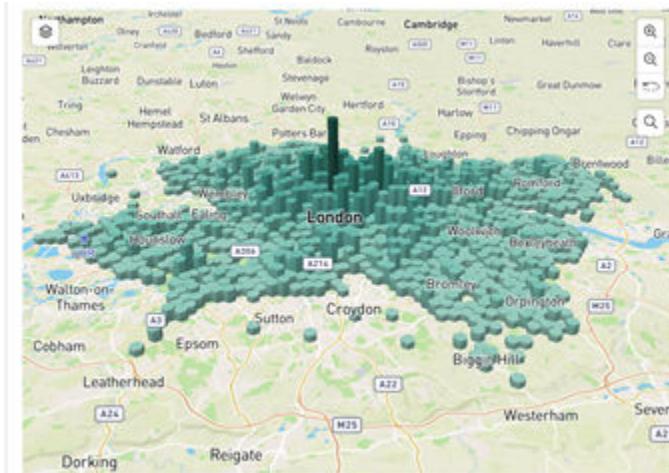
Note: If all of your hexbins are the same color and size, there are not enough data points. For example, this could occur within a map of states in the United States of America. To solve this issue, select a lower level of granularity on your map, such as the postal code.

Procedure

1. Click the **Open menu** icon  , and then click **+ New**.
2. Click **Dashboard**.
3. Leave the default values in the **Select a template** window and click **OK**.
4. In the left pane, click the **Visualizations** icon  , and then click the **Map** icon.
5. In the left pane, click **Sources**, and then click **Add a Source**. Select a data source that contains longitude and latitude data.
6. In the visualization, expand and select **Longitude/Longitude**.
7. In the left pane, expand your data items and drag latitude and longitude data to the **Latitude** and **Longitude** data slots.
8. Drag a measure to the **Size** data slot.
9. Click the **Properties** icon  , and open the **Latitude/Longitude layer** section.
10. From the **Type** menu, select **Hexbin**.
11. Adjust the **Minimum Hex extrusion height** and **Maximum Hex extrusion height**.
12. Optionally you can change the heat palette with the **Change heat palette** option and change the transparency with the **Transparency** slider.

Example

The following example shows latitude / longitude data that is combined with hexbin as type. The size of the points resembles the elevation of the locations.



Searching and zooming in a map

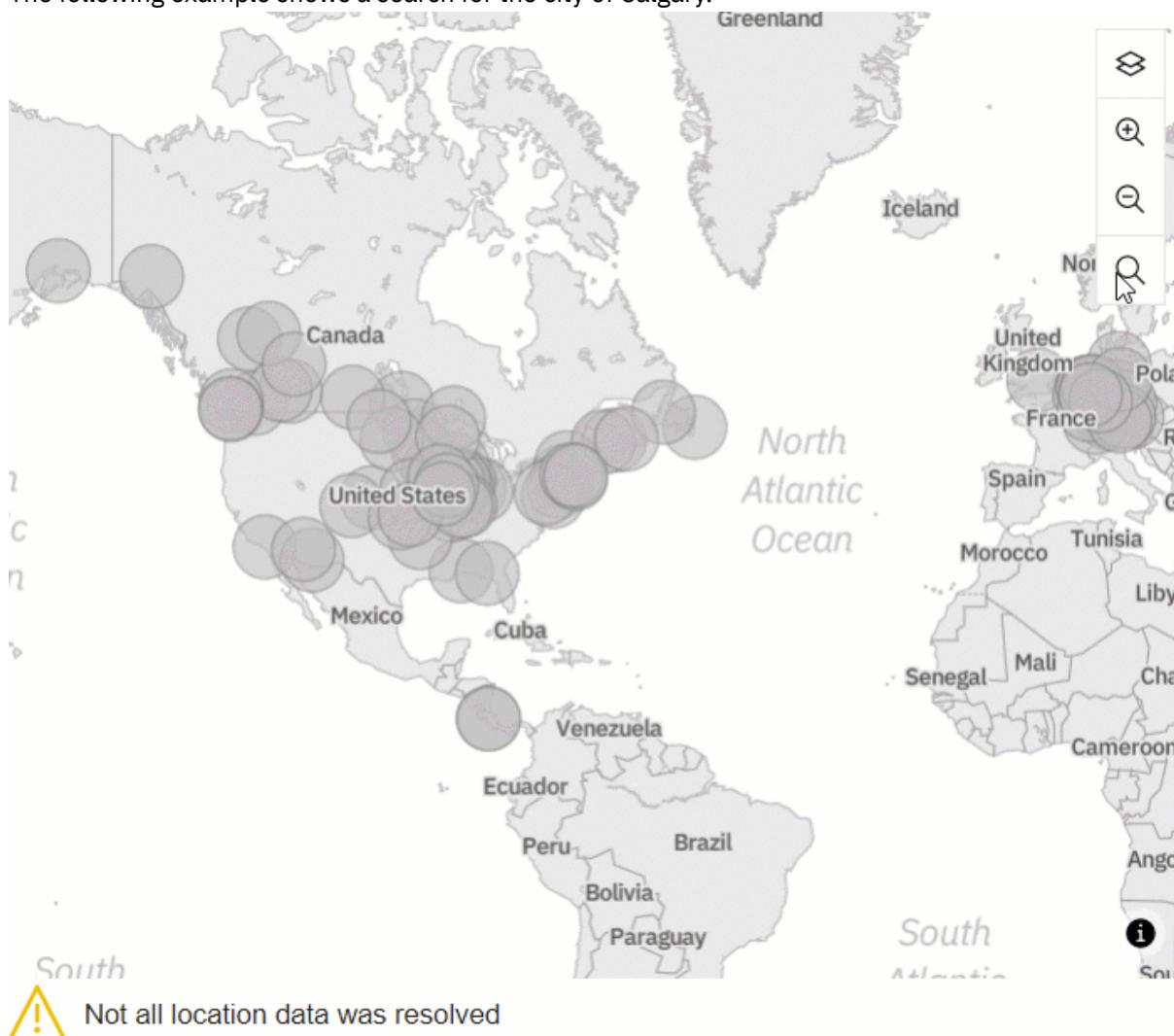
When you use a map in a dashboard, you can search and automatically zoom into items that are matched on your maps. For example, small regions that are spread over a large area.

Procedure

1. Click **New** and then click **Dashboard**.
2. Leave the default values in the **Select a template** window and click **OK**.
3. In the left pane, click the **Visualizations** icon , and then click the **Map** icon.
4. In the left pane, click **Sources**, and then click **Add a Source**. Select a data source that contains location data.
5. In the visualization, expand and select **Locations**.
6. In the left pane, expand your data items and drag location data to the **Locations** data slot.
7. In the visualization, click the search icon  and enter a location to search for.
8. To enable or disable the search function, click the **Show properties** icon , and open the **Chart** section > **Enable search control**.

Example

The following example shows a search for the city of Calgary.



Showing labels in the local language in a map in a dashboard

When you use a map in a dashboard, you can show the labels in the local language.

Procedure

1. Click **New** and then click **Dashboard**.
2. Leave the default values in the **Select a template** window and click **OK**.
3. In the left pane, click the **Visualizations** icon , and then click the **Map** icon.
4. In the left pane, click **Sources**, and then click **Add a Source**. Select a data source that contains location data.
5. In the visualization, expand and select **Locations**.
6. In the left pane, expand your data items and drag location data to the **Locations** data slot.
7. To enable or disable the **Show label in local language** function, click the **Show properties** icon , and open the **Chart** section > **Show label in local language**.

Example

The following example shows a map visualization with the standard labels.



The following example shows a map visualization with the local labels.



Custom maps and icons in Map charts

In IBM Cognos Analytics you can customize Map charts with your-style maps and your-style icons.

Before you begin

To create a custom map, you must have an account on [Mapbox](#).

Procedure

1. To create a custom map:
 - a) In a browser, navigate to [Mapbox](#) and log in to your account.
 - b) To create a map of your style, click **Styles** to open page with styles.
 - c) Click the **New Style** button.
 - d) Select a predefined template, for example, Monochrome.
 - e) In **Choose a variation**, select a map variation from options.
 - f) Click the **Customize TemplateName, Customize Monochrome** for the template Monochrome.
 - g) To implement your icons in the map, click the **Images** tab, and download an SVG file.

Note:

The recommended file size is 15 pixel x 15 pixel.

In file names, the following characters are allowed: the alphanumeric characters, the underscore, and the hyphen.

To learn about supported SVG elements and attributes, see [SVG support](#) (<https://github.com/mapnik/mapnik/wiki/SVG-support>) page.

- h) To provide a name to the style, click the name of the template, for example, Monochrome, and enter the name of your choice in the field.

- i) To save the map, click the **Publish** button.
2. To use a custom map in Visualizations:
 - a) Click the map, and go to **Properties > Chart**.
 - b) In the **Map base** field, select Custom.
 - c) In the **URL** field, paste your style URL copied from Mapbox.
 - d) Press **Enter**.
3. To use custom icons for Regions or Points in the Map chart:
 - a) Click the map, and go to **Properties > Region layer** or **Properties > Points layer**.
 - b) In the **Icon** field, select Custom.
 - c) In the **Custom icon name** field, enter the name of the icon.

Results

The changed properties are implemented now. Your-style map and icons are displayed in the Map chart.

Large custom tiles with multiple labels

When you use large tiles in your map chart, it is expected that multiple labels are displayed in the tiles.

In your map visualization in IBM Cognos Analytics, you can use tilesets that were created in Mapbox. To use a tileset, you must provide values to the following properties of the tileset in **Properties > Regions layer** of your map:

- Tileset ID
- Layer name
- Property name

When you use large tiles, and you activate the option **Show value labels**, the labels are being displayed multiple times in the tiles. Such action is expected.



Figure 1. A label is displayed multiple times in a tile.

Setting up drill-through to a report

Using drill-through, you can navigate from a visualization in a dashboard or a story to a related report while retaining the original context of the visualization.

For example, you examine revenue by product line in a visualization in your dashboard. If drill-through is defined for your visualization, you can navigate to a report that shows the revenue by product line for the past four years.

To enable drill-through for a visualization, you create one or more drill-through definitions that link the visualization to related target reports. The drill-through definitions can be shared with all visualizations in the dashboard that use the same source or can be specific to an individual visualization.

When you drill through from a visualization, the dashboard determines the context to be applied for each of the columns in the drill-through definition:

- If a column value is selected in the visualization or in another visualization on the same tab, using the same data source and within the same event group, this value is passed to the drill-through definition.

- If a column has a local filter defined in the visualization, but no selection in any visualization on the same tab, with the same data source and event group, the local filter is passed to the drill-through definition.
- A local filter on another visualization is never passed as part of the context of a drill-through definition.
- If a column has no value selected in any visualization on the same tab, with the same data source and event group, or a local filter of the visualization, the context for a column is the combination of the **All tabs** and **This tab** filters.
- If a measure column is assigned a source in a drill-through target, the value of the column is ignored. When you drill through to the target, you are prompted for a value for the associated prompt.

There are some restrictions on the context passed to a drill-through definition:

- If the prompt of a target report is a range filter and multiple column values are selected in the visualization, only the first value is passed to the target report.
- An exclude filter in a visualization is never passed as context to a drill-through.
- If a dashboard drill-through does not provide the value for a parameter in a target report, the value is obtained from the global parameter with the same name as the parameter, if one exists.

Adding a drill-through definition to a report

A drill-through definition in a visualization links the visualization with a related target report. One visualization can have multiple drill-through definitions.

About this task

When creating drill-through definitions for visualizations with filters, the filter values affect the context that is passed to the target report in the following ways:

- If you use a column with a range filter as a drill-through source, the range is passed to the target report.
- If you use an **Include** condition, all of the values included in the filter are passed to the target report.
- If you use an **Exclude** condition, none of the values in the filter are passed to the target report.

Procedure

1. Select the visualization that you want to work with.
2. In the toolbar, click the **Drill-through** icon .
3. Click **Add a new drill-through definition**.

If you don't see **Add a new drill-through definition**, click the **Edit** icon .

4. From the **Team content** folder, browse to the target report that you want to drill through to.
 - a) If the drill-through target report has prompts, use the drop-down lists to associate the columns from your visualization to the prompts in the target report. A filter must have at least one value selected before the associated column is displayed in the list of possible source columns.
 - b) If the drill-through target report does not have prompts, continue to create the drill-through definition. However, the target report will not receive any context from the visualization.
5. Select the check box to add the drill-through definition to all visualizations in your dashboard or story that use the same data source in the same connection.

When you are done, use the switcher on the app bar to return to your dashboard or story.

Results

You can now drill through from your visualization to the target report. To do so, click one or more columns in your visualization and click the **Drill-through** icon  in the toolbar.

Editing a drill-through definition to a report

You can modify drill-through definitions in a visualization.

About this task

You can modify the drill-through definition in a visualization in the following ways:

- Change the title of the drill-through definition. By default, the target report name is used as the drill-through definition title.
- Assign different columns from the visualization to the target.
- Add another drill-through definition.
- Delete the drill-through definition.

Procedure

1. Select the visualization that uses a drill-through definition that you want to edit.

2. Click the **Drill-through** icon  in the toolbar.

3. Click **Manage**.

If you don't see the **Manage** link, click the **Edit** icon .

4. To edit the drill-through definition title, or to assign different columns from the visualization to the target, click the **Edit** icon  beside the title of the target.

- a) In the dialog box that appears, to edit the name of the drill-through definition, place your cursor beside the title and click the **Edit** icon  that appears.

- b) To assign a different column from the visualization to the drill-through target, select a different column from the data column list.

- c) From the **Filter by mapping state** drop-down menu, filter through the list of parameter mappings in the drill-through definition. Select **Broken** to quickly identify parameters with mapping errors that need to be updated.

When filtering through the list of parameters, consider the following:

- When a parameter name is changed in a report, both the old and new name might be present in the report specification, even though only one name is currently in use. Both parameters appear on the list, but only the parameter in use needs to be mapped.
- If a parameter is optional, or prompting is desirable, you can leave the parameter in the **Unmapped** state.
- If a broken parameter is not mapped, and the drill-through definition is saved and then re-opened, the parameter will appear as **Unmapped**. This is the expected behavior.

- d) To add another drill-through target report, click **Add another drill-through definition**.

5. To delete the drill-through definition, click the **Delete** icon  beside the name of its target.

6. Click **OK** and click **Apply**.

Adding a drill-through definition for one dashboard to another

A drill-through definition in a visualization links a dashboard with another dashboard. One visualization can have multiple drill-through definitions.

About this task

For optimal performance, make sure that the target dashboard that you drill through to uses the same data source as the source dashboard. If the target dashboard uses a different data source from the source dashboard, apply filters when metadata identifiers match.

When you drill-through to another dashboard, the content of the visualization in your source dashboard is used to filter the target dashboard.

Procedure

1. Select the visualization that you want to work with.
 2. In the toolbar, click the **Drill-through**  icon.
 3. Click **Add a new drill-through definition**.
If you don't see **Add a new drill-through definition**, click the **Edit** icon .
 4. From the **Team content** folder, browse to the target dashboard that you want to drill through to.
 5. Select the checkbox to add the drill-through definition to all visualizations in your dashboard or story that use the same data source in the same connection.
- When you are done, use the switcher on the app bar to return to your source dashboard.

Results

You can now drill through from your visualization to the target dashboard. To do so, click one or more columns in your visualization and click the **Drill-through**  icon in the toolbar.

Editing a drill-through definition for one dashboard to another

You can modify drill-through definitions in a visualization.

About this task

You can modify the drill-through definition in a visualization in the following ways:

- Change the title of the drill-through definition. By default, the target dashboard name is used as the drill-through definition title.
- Add another drill-through definition.
- Delete the drill-through definition.

Procedure

1. Select the visualization that uses a drill-through definition that you want to edit.
2. Click the **Drill-through** icon  in the toolbar.
3. Click **Manage**.

- If you don't see the **Manage** link, click the **Edit** icon .
4. To edit the drill-through definition title, click the **Edit**  icon beside the title of the target dashboard.
 - a) In the dialog box that appears, edit the title of the drill-through definition.
 - b) To add another drill-through target report, click **Add another drill-through definition**.
 5. To delete the drill-through definition, click the **Delete** icon  beside the name of its target.
 6. Click **OK** and click **Apply**.

Embedding visualization code

You can use a code snippet to easily embed dashboard visualizations in websites or in applications that support HTML.

About this task

You do not need to use public Application Programming Interfaces (APIs) to embed visualizations in websites. Instead, use the **Embed** function that is available in the dashboard toolbar. This function generates a code snippet that can be put into the code of a website.

Important: This function is available only in IBM Cognos Analytics on-premises.

Procedure

1. Open a dashboard from **Content**.
2. After saving changes that you made in the dashboard, select one or more visualizations that you want to embed.
You can only embed visualizations that are available in the **System** section of the **Visualizations** gallery.
3. Click the **Embed** icon  in the toolbar.
4. Click the **Copy** icon  to copy the code snippet.

Note: The next steps require web developer skills.

5. In an HTML editor, create new HTML file or open the file with the code of the website in which you want to embed visualizations.



Attention: The HTML file must start with the `<!DOCTYPE html>` declaration.

6. Paste the snippet into the HTML file.
7. Fit embedded visualization to the website:
 - Specify the height of the visualization that you want to embed in pixels for all HTML containers.
 - If you want the language of the visualization to be different than the language of the website, define the language of the visualization in the snippet. For example, to set the product language (pl) to French and the content language (cl) to German, add the query string `?pl=fr&cl=de` in the first script element of the snippet:

```
.../bi/dashboard/js/api/CognosDashboardApi.js?pl=fr&cl=de
```

If only one of the languages is set with the string, this language will be used to both the product and the content.

If no language is set, the local language of browser will be used.

Note: The content language is defined by letters and might include a territory variant. For example, use `en-US` to set English that is used in the United States of America.

8. Save the HTML file.
9. If you embed your visualization in a website that is on a domain other than your Cognos Analytics installation, you must enable Cross-Origin Resource Sharing (CORS) for the server in Cognos Analytics. To enable CORS, you can use one of the following ways:
 - Configure the `Configuration.cookieSameSite` advanced setting in Cognos Analytics. For more information, see [Setting the cookieSameSite attribute](#).
 - Add headers to the configuration of your HTTP server. For example, for HTTP Apache server, you need to add the following headers:

```
Header always set Access-Control-Allow-Origin "https://host name:port number"
Header always set Access-Control-Allow-Headers "Content-Type, Content-Encoding, X-Xsrf-Token, X-Audit-DataSearchpath, X-Audit-Type, X-Queryuserid, X-Model-Last-Modified, X-Audit-Searchpath, X-Qs-Querycontext-Id, X-Ca-Affinity, Etag, X-Ca-Transaction, X-Compressed-By, X-Qs-Request-Id"
Header always set Access-Control-Expose-Headers "X-Ca-Affinity"
Header always set Access-Control-Allow-Credentials "true"
Header always set Access-Control-Allow-Methods "POST, GET, PUT, DELETE, PATCH, OPTIONS"
Header onsuccess edit Set-Cookie (.*) "$1; SameSite=None; Secure"
```

Results

An embedded visualization is now visible on the website. To interact with an embedded visualization, click the visualization and log in with your Cognos Analytics credentials. Such interactions do not affect original visualizations because they are limited to consumer actions.

Relative date analysis

The relative date feature makes it easier to do as-of-date analysis. For example, you can quickly add year-to-date or previous month values to a data container, such as a visualization, cross tab, list, and so on.

To do relative date analysis, a modeler must create a data module in which your data references a calendar. You use this data module as a source for relative date analysis in your data container.

Before you can do as-of-date analysis, the following tasks must be completed:

Administrator

Import the Calendars sample. For information about the Calendars sample, see "Importing the base samples" in the *IBM Cognos Analytics Samples Guide*.

Optionally, create an as-of-date global parameter and share it with users. You can use this parameter to ensure that a data container always reports as of a specific date. Without this parameter, the data container reports as of the current date.

Modeler

Associate a date column in your data with one of the calendars and associate measures to this date column.

For more information about how to do the previously listed tasks, see *Data Modeling* in IBM Cognos Analytics IBM Knowledge Center .

The calendar data modules contain the following filters:

- Prior week
- Prior month (not available in the retail calendar)
- Prior quarter
- Prior year
- Current week
- Current month
- Current quarter
- Current year
- WTD (week to date)
- MTD (month to date)
- QTD (quarter to date)
- YTD (year to date)
- Prior WTD
- Prior MTD
- Prior QTD
- Prior YTD
- Same week last year
- Same month last quarter
- Same month last year
- Same quarter last year
- Same MTD last quarter
- Same MTD last year

- Same QTD last year

You can do relative date analysis in the following ways:

- Include relative date filtered measures in the data container. In the following example, you would select one of the child measures of the Service Requests measure that references a relative date filter:

▼  Service Requests

-  Prior Week [Service Requests]
-  Prior Month [Service Requests]
-  Prior Quarter [Service Requests]
-  Prior Year [Service Requests]
-  Current Week [Service Requests]
-  Current Month [Service Requests]
-  Current Quarter [Service Requests]
-  Current Year [Service Requests]
-  Prior WTD [Service Requests]
-  Prior MTD [Service Requests]
-  Prior QTD [Service Requests]
-  Prior YTD [Service Requests]
-  WTD [Service Requests]
-  MTD [Service Requests]
-  QTD [Service Requests]
-  YTD [Service Requests]
-  Same Month Last Quarter [Service Requests]
-  Same Week Last Year [Service Requests]
-  Same Month Last Year [Service Requests]
-  Same Quarter Last Year [Service Requests]
-  Same MTD Last Quarter [Service Requests]
-  Same MTD Last Year [Service Requests]
-  Same QTD Last Year [Service Requests]

- Add a relative date filter to a query by using the predefined date filters.

If your administrator defined an as-of-date global parameter for your role, all data containers that contain relative date filters or filtered measures report as of the value of this parameter. You can set the value in

My parameters . For more information about global parameters, see "Using customized parameters" in the *IBM Cognos Analytics Reporting Guide*.

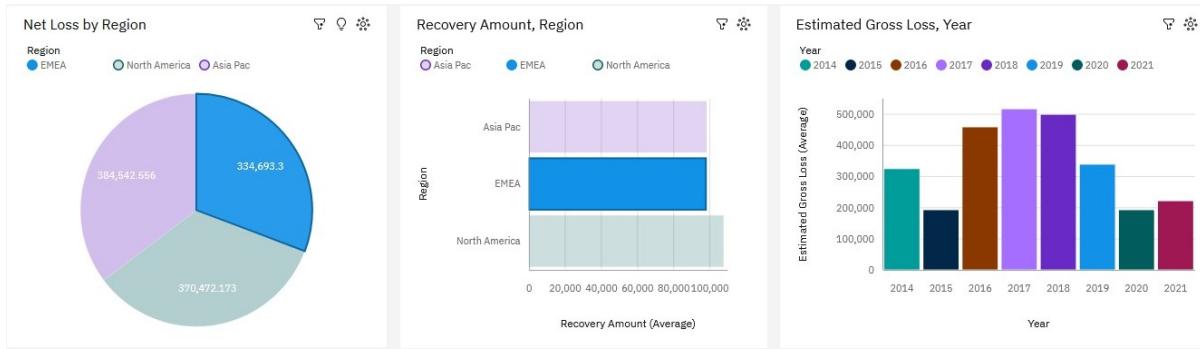
Applying consistent colors to the same values

When multiple visualizations on the canvas share a category or value, you can use the dashboard **Color consistency** setting to ensure that the same color is assigned to this category or value in each visualization.

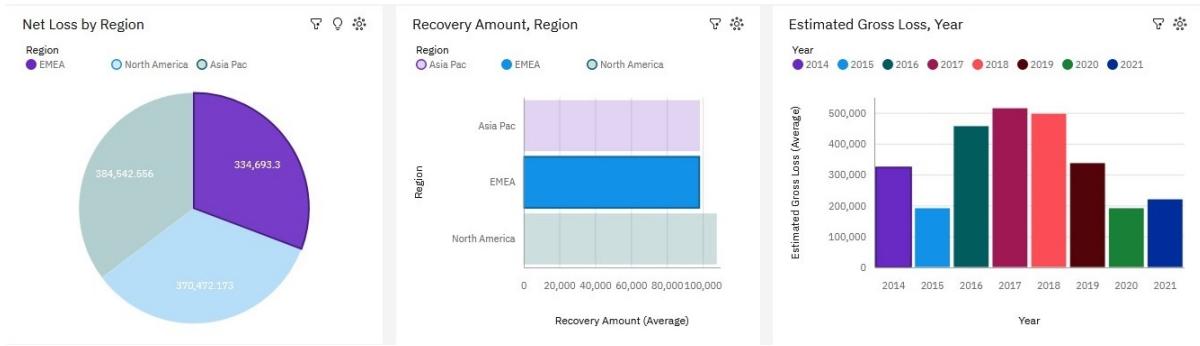
About this task

For this setting to be effective, the same color palette must be used for each visualization.

When the **Color consistency** setting is enabled, the same color is assigned to the shared category or value in different visualizations. This color is not used in other visualizations that do not include the shared value. For example, in the following image, the same colors are applied to the Region values, Asia Pac, EMEA, and North America, in the two visualizations that include the Region category.



When the **Color consistency** setting is disabled, a different color can be assigned to the shared category or value in different visualizations. This color can be used in other visualizations that do not include the shared value. For example, in the following image different colors are applied to the Region values, Asia Pac, EMEA, and North America, in the two visualizations that include the Region category.



For new dashboards and stories, the **Color consistency** setting is on by default. For upgraded dashboards, the **Color consistency** setting is off by default because you might have selected specific palettes for different visualizations.

Procedure

1. Click the **Properties** icon .
 - If you don't see the **Properties** icon, click the **Edit** icon .
 2. For the entire dashboard or story, ensure that nothing else has focus by clicking the background, away from any visualization or object.
 3. On the **General** tab, select **Advanced**.
- Tip:** Ensure that you are in the dashboard properties.
4. Click the **Color consistency** toggle to turn the setting on or off.

Creating a donut visualization from a pie

You can add a hole to the middle of your pie visualization to create a donut visualization.

About this task

An inner label is displayed in the hole of a donut visualization and is enabled by default. This number is not the average of the segments. It is always a total of the segments. If you don't find this display useful, you can use the properties to disable the label. For more information, see [“Disabling the donut visualization inner label” on page 127](#).

Procedure

1. Select the pie visualization that you want to work with and click the **Properties** icon .

If you don't see the **Properties** icon, click the **Switch to edit** icon .

2. On the **Visualization** tab, under **Chart**, set the **Donut hole radius** property to the percentage of the pie that you want the hole to take up.

Disabling the donut visualization inner label

You can hide the inner label in a donut visualization.

About this task

When you add a donut hole to a pie chart visualization, the inner label that is displayed in a donut is enabled by default. This number is not the average of the segments. It is always a total of the segments. If you don't find this display useful, use the properties to disable the label.

Procedure

1. Click the donut that contains the inner label.

2. Click the **Properties** icon .

If you don't see the **Properties** icon, click the **Switch to edit** icon .

3. In the **Visualization** tab, under **Chart**, select the **Show inner label** toggle to disable the setting.

Adding a schematic to a dashboard

You can add schematics to your IBM Cognos Analytics report.

About this task

Before you can import a schematic, author it first. For more information, see the *Authoring schematics - tutorial* documentation in the *IBM Cognos Analytics Custom Visualizations Developer Guide*.

Schematics are visualizations that can map data directly onto an arbitrary graphic representation. Schematics can, for example be floor plans, seating arrangements, mechanical drawings, or schematic geographical representations.

Procedure

1. Create a dashboard.

2. Click **Visualizations**  > **Custom** > **Custom visuals**.

If there are no custom visuals available, then you can add a custom visual through the **Add a custom visual** button.

3. Select the schematic that you want to use.

4. A schematics package can contain several different SVGs. The first SVG is displayed. You can select other SVGs from the schematic package from **Properties** > **Schematics** > **SVG reference**.

Adding points and regions to a schematic in a dashboard

You can enhance IBM Cognos Analytics schematics by using point or region information. Use point and region information by adding a layer on the schematic to display the additional information.

Procedure

1. Create a dashboard.
2. Click **Visualizations**  > **Custom** > **Custom visuals**.
If there are no custom visuals available, then you can add a custom visual through the **Add a custom visual** button.
3. Select the schematic that you want to use.
4. Click **Sources**  and select a data source that you want to use.
5. On the **Fields** pane, click the down arrow and select:
 - **Regions**
 - **Points**
6. In the left pane, expand your data items and drag point or region data to the **Locations** field.
7. Drag a measure to the **Location color** or **Point color** field.

Example

A schematic example that displays a UK Parliament House of commons SVG. Seat keys are mapped to constituencies.

The **Regions** layer shows a leave or stay. The **Points** layer shows the leave estimate.



Widgets

You can add widgets such as text, media, web pages, images, and shapes.

Adding text

Reinforce your analysis by adding text to your dashboards and stories. For example, you can highlight key points that are shown in a visualization and provide background information.

Procedure

1. Click the **Widgets** icon .

If you don't see the **Widgets** icon, click the **Edit**  icon first.

2. If you want to position the widget yourself, drag the **Text** icon to the canvas. If you want the widget to fill the next available pane in the template, click the **Text** icon .
3. Type in the text box and then click away from it.
4. To format the text, select the text in the widget, and then in the toolbar change one or more of the following properties:
 - Font
 - Font size
 - Text color
 - Style, such as bold, underline, or italic
 - Alignment
 - Unordered list
 - Ordered list
5. To position the text vertically or diagonally, use your cursor to grab the corner of the text box and rotate the widget.

Adding images and shapes

Improve the look and feel of your dashboards and stories by adding images and shapes.

Procedure

1. Click the **Widgets** icon .

If you don't see the **Widgets** icon, click the **Edit** icon .

2. To add an image from the **Widgets** tab, complete the following actions:
 - a) If you want to position the image widget yourself, drag the **Image** icon to the canvas. If you want the widget to fill the next available pane in the template, click the **Image** icon .
 - b) Enter the URL, and press Enter to save it.
Note these requirements for images:
 - Use one of the following formats for images: JPEG, JPG, GIF, PNG
 - Use HTTP or HTTPS (secure HTTP) format. URLs are validated for format only; you must ensure that the link is valid.
3. If your administrator has customized the **Widgets** panel with additional images:
 - a) Select the **Images** tab.

- b) Click an image to add it to your dashboard.
4. To add a shape, complete one of the following actions:
- If you want to position the shape yourself, drag the shape that you want to the canvas.
 - If you want the shape to fill the next available pane in the template, click the icon for the shape.

Adding web pages

Add action by embedding web pages in your dashboards and stories.

Procedure

1. Click the **Widgets** icon
- If you don't see the **Widgets** icon, click the **Edit** icon .
2. If you want to position the web page widget yourself, drag the **Web page** icon to the canvas. If you want the widget to fill the next available pane in the template, click the **Web page** icon
 3. Type the URL, and press Enter to save it.
- Note these requirements for web pages:
- Specify the URL in HTTPS (secure HTTP) format because of the security requirements of web browsers.
 - Check that the target website allows being embedded in another application.
- For example, you can't embed Twitter.com.

Adding video or audio

Add action by embedding media, such as video or audio, in your dashboards and stories.

Procedure

1. Click the **Widgets** icon
- If you don't see the **Widgets** icon, click the **Edit** icon .
2. If you want to position the media widget yourself, drag the **Media** icon to the canvas. If you want the widget to fill the next available pane in the template, click the **Media** icon
 3. Type the URL, and press Enter to save it.
- Note these requirements for media:
- Use one of the following formats for media: YouTube URLs, MP4, MP3, AAC, M4A
 - Specify the URL in HTTPS (secure HTTP) format because of the security requirements of web browsers.

Changing web pages, media, and images

To change which web page, media, or image, modify the URL that points to its location.

Procedure

1. Click the **Edit** icon
2. Select the web page, media, or image that you want to work with.
3. Click the **Properties** icon

- Type or paste the new URL.

Adding a Notebook widget

If IBM Cognos Analytics for Jupyter Notebook is enabled in IBM Cognos Analytics, you can use the **Notebook** widget to add notebooks to a dashboard or story.

Procedure

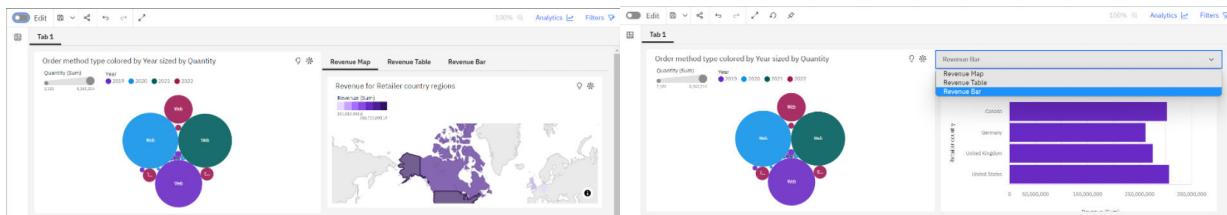
- Click the **Widgets** icon
- If you don't see the **Widgets** icon, click the **Edit** icon
- To add a notebook from the **Widgets** tab, complete the following steps:
 - If you want to position the widget yourself, drag the **Notebook** icon
 - From the **Notebook** widget, click **Select a notebook**.
 - Select a notebook and click **Open**.
 - From the available cells, select one notebook cell to include in your dashboard.
- To see when a **Notebook** widget was last refreshed, hover your cursor over the time stamp icon
- To hide the time stamp icon
- To hide the time stamp icon
- To select a different notebook cell for a **Notebook** widget, select the widget, and click the **Edit widget** icon

Adding a nested dashboard widget

Use nested dashboards to organize your visualizations and to make the information more convenient to view.

About this task

A nested dashboard is a self-contained dashboard that you can add to a dashboard canvas or even into another nested dashboard. You can use nested dashboard to include multiple sets of content on the dashboard canvas. You can also switch between different content options by using either tabs or a drop-down list. In the following examples, there is one nested dashboard on the left half of the dashboard canvas that shows a bubble visualization, while the right half of the dashboard canvas has a nested dashboard with three different visualizations, each with their own advantages, that you can view while referring to the bubble visualization. You can access these different visualizations with either tabs or a drop-down list.



Note: The nested dashboards widget is not available in Cognos Analytics for Mobile

Procedure

1. Click the **Widgets** icon

If you don't see the **Widgets** icon, click the **Edit** icon

2. To add a nested dashboard from the **Widgets** tab into the main dashboard canvas, complete one of the following steps:

- If you want to position the widget yourself, drag the **Nested dashboards** icon
- If you want the widget to fill the next available pane in the template, click the **Nested dashboards**



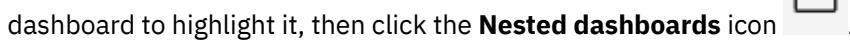
3. To add a nested dashboard from the **Widgets** tab into another nested dashboard, complete one of the following steps:

You can nest two additional levels of nested dashboards, for a total of three levels of nesting. That is, your main dashboard canvas can have a first level nested dashboard, which can have a second level nested dashboard, which can then have a third level nested dashboard.

- If you want to position the widget yourself, drag the **Nested dashboards** icon
- to the destination dashboard.

A blue border appears in the destination dashboard.

- If you want the widget to fill the next available pane in the nested dashboard, click the destination



Filters

Focus on one area of your data or to see the impact of one column. For example, you can see the impact of the duration of courses on the cost of courses by department and organization.

Important: If filter values in a dashboard change in the underlying data source or you relink to another source with the same structure but different data, then the dashboard visualizations based on those filter values will return no data since the data no longer exists in the source. However, the chosen values will still be represented in the filter objects to reflect what was originally chosen and will only disappear after you correct your filters.

Filtering data in one visualization

There are several ways that you can filter the data in a visualization. You can keep or exclude a few data points in the visualization. You can use the data tray to filter the data in several columns and the columns are not required to be in the visualization. You can also add a local filter to filter a column or to define a filter condition.

Procedure

1. If you want to keep or exclude a few data points in the visualization, complete the following actions:

a) Right-click the data point that you want to keep or exclude. Use Ctrl+click to select several data points. You can select data points in the visualization, on the legend, or in the axis.

b) To show only the selected data points, click **Keep**.

All other data points are excluded from the visualization.

c) To hide the selected data points, click **Exclude**.

2. If you want to filter the data in one or more columns, complete the following actions:

a) Click the **Open data tray** icon  at the bottom of the canvas.

If you don't see the **Open data tray** icon, click the **Edit** icon .

b) Click a column heading in the data tray.

c) Click **Filter**.

d) Specify what will be filtered on.

- If the column contains numeric data, use the sliders or enter a range of values to filter on.
- If the column is a hierarchy, expand the levels in the hierarchy and select the members or levels that you want. For example, select 2017 and each quarter in 2016.
- If the column has the data type of date, time, or timestamp (also known as datetime), select before, after, or between for the dates to include in the filter.
- If the column contains text, click one or more members to filter on. Or you can add a filter condition. With a filter condition, you have the following options: **Equals**, **Contains**, **Begins with**, **Ends with**, **Does not equal**, **Does not contain**, **Does not begin with**, and **Does not end with**.

e) If you want to select many values, select the ones that you don't want and click **Invert**.

f) To apply the filter, click **OK**.

3. If you want to define a filter condition or filter a column in a visualization, complete the following actions:

a) Select a visualization and open the **Fields** pane.

If you don't see **Fields** pane icon , click the **Edit** icon .

b) Click the **Sources** icon  and expand the data asset that you want to use.

c) Drag a column into the **Local filters** box in the **Fields** pane.

d) Select the members that you want to use in the filter or add a filter condition.

If you decide to add a filter condition, you have the following options: **Equals**, **Contains**, **Begins with**, **Ends with**, **Does not equal**, **Does not contain**, **Does not begin with**, and **Does not end with**.

e) If you want to select many values, select the ones that you don't want and click **Invert**.

f) To apply the filter, click **Done**.

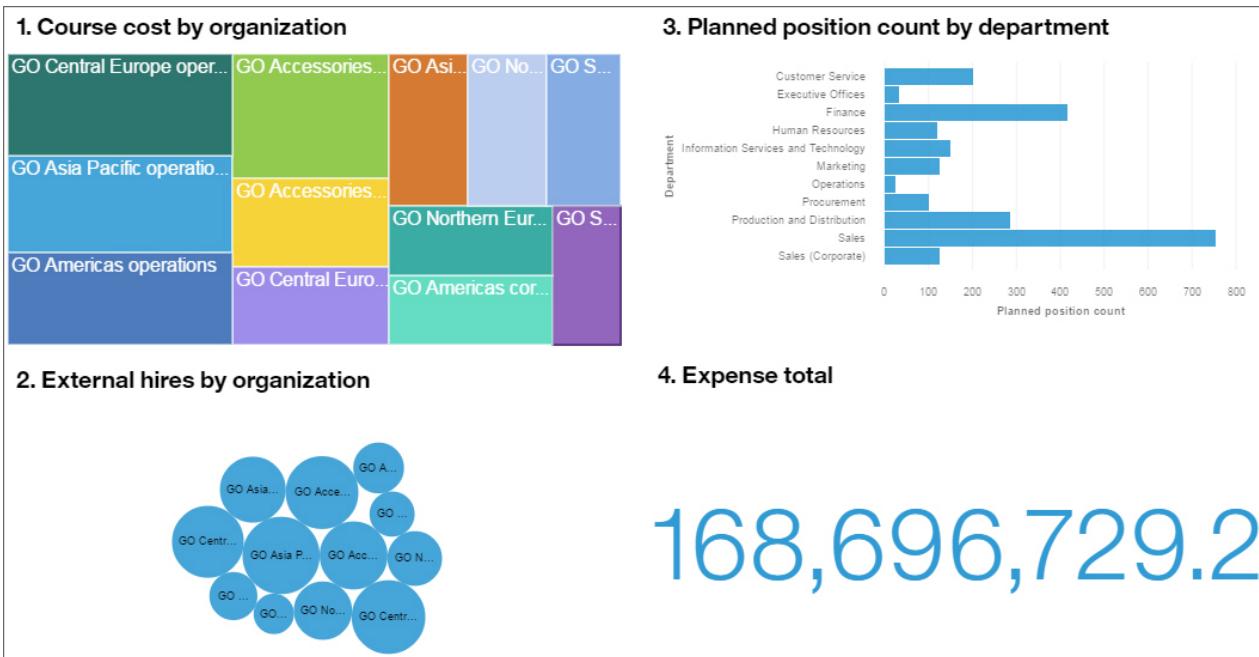
Highlighting data points across visualizations

You can select one or more data points in one visualization and see these data points highlighted in all related visualizations in the current tab of the dashboard or story.

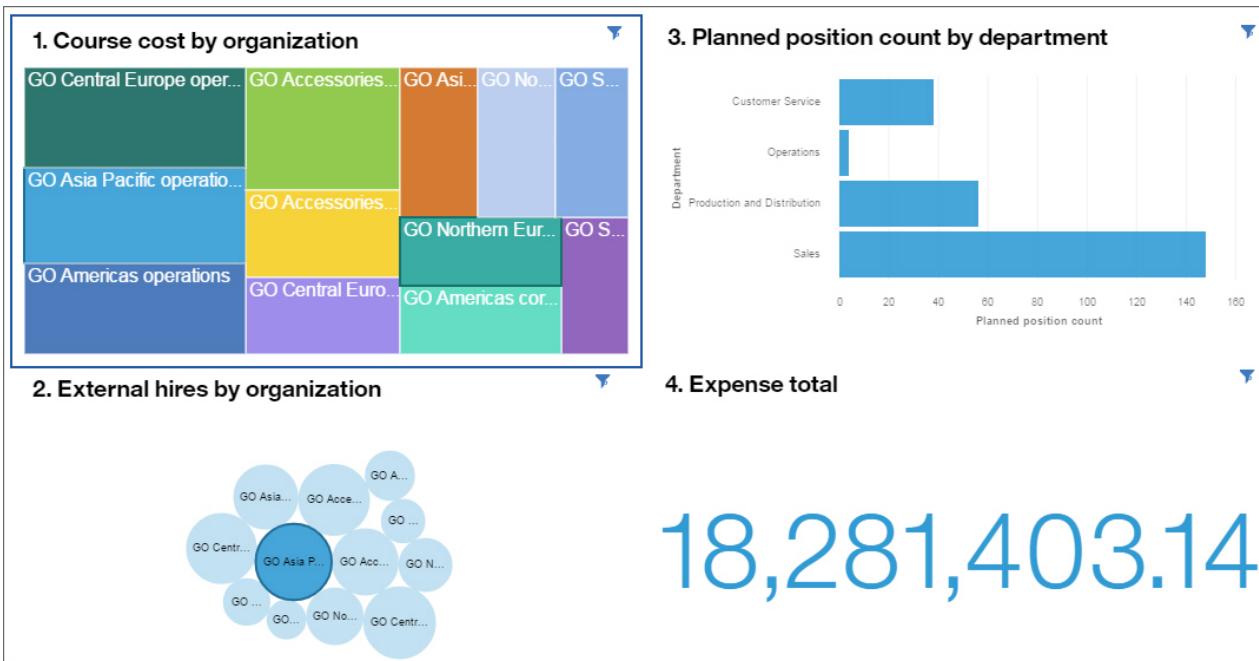
Visualizations are related if they use the same data asset. Visualizations that use different data sets are also connected if there are matching column names in the different data sources. If a visualization doesn't contain the data points, its data is filtered for the selected data points. A data point can be an element in the visualization, such as a bar or bubble, or an axis label, or a column or member in the legend.

About this task

For example, you have several visualizations on the same tab. The first one shows the breakdown of course costs by organization. The second one shows how many external people were hired in each organization. The third one shows how many positions each department plans to add. The fourth one shows the total for the expenses.



You select the "GO Asia Pacific operations" box in the first visualization. "GO Asia Pacific operations" is immediately highlighted in the second visualization. The data in the third and fourth visualizations are filtered to show only the departments in the "GO Asia Pacific operations" organization and a filter icon is added to these visualizations.



In some cases, some visualizations do not appear to be filtered. This might happen when the highlighted visualizations and the to-be filtered visualizations are only dimension tables joined by multiple fact tables where the filter cannot be applied to any of the fact streams and is dropped. To avoid this situation, an explicit fact table needs to be added to the visualizations.

Procedure

1. Click the data point that you want to highlight. To select multiple data points, touch and hold (Ctrl+click) each additional data point.

The data points are highlighted in each visualization that contains them. Other related visualizations that do not contain the data points are filtered and a filter icon is added to the visualizations. To see info about the current filter, click the **Filter** icon  in the visualization.

If a column is in the **Repeat (row)** or the **Repeat (column)** data slot for a tree map visualization, you cannot select one of its members and see it highlighted in all related visualizations. For example, a tree map includes the Year column in the **Repeat (row)** data slot and a bar visualization includes the Year column in one of the axes. You can highlight a specific year by selecting it in the bar visualization and that year will be highlighted in the tree map but you cannot select a year in the tree map.

2. To remove the highlighting, click in the background of the visualization.

Adding a filter widget

You can add a column to the canvas and use it as a widget for filtering data. This type of filter is known as a *context filter*.

Procedure

1. Click the **Sources** icon  and expand the data asset that you want to use.
If you don't see the **Sources** icon, click the **Edit** icon .
2. Drag the column that you want to use as the filter widget to the canvas of the dashboard or story.
You can also add a column from the **This tab** filter area as a filter widget. Click the **Menu** icon  and click **Add to canvas**.
3. Filter the data in the visualizations.
 - If the column contains distinct values, select the values that you want to use in the filter widget.
 - If the column is a hierarchy, expand the levels in the hierarchy and select the members or levels that you want. For example, select 2017 and each quarter in 2016.
 - If the column has the data type of date, time, or timestamp (also known as datetime), select before, after, or between for the dates to include in the filter.

Keeping or excluding data points in a visualization

You can keep or exclude specific data points in a visualization. For example, an outlier makes it hard to see the other data points in the visualization.

Procedure

1. Select the discovery that you want to work with.
2. Right-click a data point in the visualization or in the legend. Use Ctrl+click to select several data points.
3. To display only the selected data points, click **Keep**.
The filter is applied to that visualization only. All other data points are excluded from the visualization.
4. To hide the selected data points, click **Exclude**.
The filter is applied to that visualization only.
5. To remove the **Keep** or **Exclude** filter, right-click the column on the axis and click **Select items**. For example, if you excluded one year, you right-click the Year column on the axis.

Disconnecting visualizations and filter widgets

By default, visualizations and filter widgets communicate with each other. When you highlight a data point in one visualization or filter widget, you filter the data in all other visualizations or filter widgets that use

the same data. Sometimes you want to keep one or more visualizations not change when you highlight a data point elsewhere.

Visualizations that use different data sources also communicate with each other if there are matching column names in multiple sources. For example, if **Year** from one data source is included in a visualization and **Year** from another data source is included in another visualization, the two visualizations are connected by default through the matching **Year** column.

You can see what's connected, create new connections, disable connections, and create new groups of connections. To view and modify widget connections, there must be at least two visualizations or filter widgets on the canvas.

Procedure

1. On the toolbar, click the **View widget connections** icon. 

Matching numbers on the visualizations and filter widgets mean that they are connected to each other. The visualizations and filter widget must come from the same source to be connected.

2. Click a visualization or filter widget with a number shown in the middle.
3. To disconnect a visualization or filter widget from all others on the canvas, click the **Break all links** icon. 
4. To create a new connection, click the **Create new connection** icon. 
5. To add a visualization or filter widget to an existing group of connections, click the **Add to an existing connection** icon and select the connection. 
6. To stop working with the widget connections, click the **View widget connections** icon again. 

Filtering data in the current tab

You can filter the data that appears in all visualizations that use the selected data asset in the current tab of the dashboard or story.

If you add the same column to the **All tabs** filter and to the **This tab** filter, the members that you pick in the **All tabs** filter are applied to the **This tab** filter. For example, you add the Year column to both filters. You filter **All tabs** to show 2015, 2016, and 2017. The **This tab** filter will show only these years and you can filter the years further.

You cannot drag a column between the **All tabs** and **This tab** filter areas.

Procedure

1. In the **Sources** pane, expand the data asset to see its contents.



If you don't see the list of data assets, click the **Switch to edit** icon.



2. Drag one or more columns to the **This tab** filter area. You can change the order of columns that have been added to the filter.

Tip: Any selections made in the current tab are cleared when applying any filter in the **This Tab** filter area by selecting a subset of values.

3. To define the filter, click the column in the **This tab** filter area.

- If the column contains distinct values, select the member or members that you want to filter on.
- If the column contains continuous values, use the slider to select a range of values to filter on. You can also click the start or end points of the range and enter a number.

- If the column is a hierarchy, expand the levels in the hierarchy and select the members or levels that you want. For example, select 2017 and each quarter in 2016.
- If the column has the data type of date, time, or timestamp (also known as datetime), select before, after, or between for the dates to include in the filter.

4. Click **OK**.

Filtering data in all tabs

You can add a filter to apply to all visualizations that use the selected data asset in all tabs of your dashboard. Infographics don't have multiple tabs.

If you add the same column to the **All tabs** filter and to the **This tab** filter, the members that you pick in the **All tabs** filter are applied to the **This tab** filter. For example, you add the Year column to both filters. You filter **All tabs** to show 2015, 2016, and 2017. The **This tab** filter will show only these years and you can filter the years further.

You cannot drag a column between the **All tabs** and **This tab** filter areas.

Procedure

1. In the **Sources** pane, expand the data asset to see its contents.



If you don't see the list of data assets, click the **Switch to edit** icon.



2. Drag one or more columns to the **All tabs** filter area. You can change the order of columns that have been added to the filter.

Tip: Any selections made in all tabs are cleared when applying any filter in the **All Tabs** filter area by selecting a subset of values.

3. To define the filter, click the column in the **All tabs** filter area.

- If the column contains distinct values, select the member or members that you want to filter on.
- If the column contains continuous values, use the slider to select a range of values to filter on. You can also click the start or end points of the range and enter a number.
- If the column is a hierarchy, expand the levels in the hierarchy and select the members or levels that you want. For example, select 2017 and each quarter in 2016.
- If the column has the data type of date, time, or timestamp (also known as datetime), select before, after, or between for the dates to include in the filter.

4. Click **OK**.

Clearing filters

You can quickly clear the values that you've filtered on and select new values for a dashboard or story.

Procedure

1. To clear the values that you filtered on in the **This tab** filter area, click the **Menu** icon in the **This tab** filter area and click **Clear all filters**.

If you don't see the **Menu** icon, click the **Switch to edit** icon.



2. To clear the values that you filtered on in the **All tabs** filter area, click the **Menu** icon in the **All tabs** filter area and click **Clear all filters**.

3. To clear the values that you selected in a filter widget, click the **Menu** icon in the filter widget and click **Clear all**. Then click **Apply**.

Removing filters

You can delete filters from dashboards, stories, or from a visualization.

Procedure

1. To remove filters from the **This tab** filter area, complete one of the following actions:
 - To remove one column from the filter area, click the **Menu** icon for that column and click **Delete filter**.
⋮
 - To remove all columns, click the **Menu** icon in the **This tab** filter area and click **Delete all filters**.
2. To remove filters from the **All tabs** filter area, complete one of the following actions:
 - To remove one column from the filter area, click the **Menu** icon for that column and click **Delete filter**.
⋮
 - To remove all columns, click the **Menu** icon in the **All tabs** filter area and click **Delete all filters**.
3. To remove the filter from one visualization, complete the following actions:
 - a) Click the **Filter** icon in the visualization.

 - b) Click the **Delete filter** icon.

4. To remove the filter from the data tray, complete the following actions:
 - a) Click the **Filter** icon next to the column heading in the data tray.

 - b) Click **Filter**.
 - c) Click **Clear all**.
 - d) Click **OK**.

Sorting

You can sort data in ascending or descending order. You can sort the data in either the x-axis or y-axis, depending on what type of data is in an axis. You can also create a custom sort order.

Sorting in numerical order

Understand how different items are ranked by sorting the data from the lowest number to the highest or from the highest number to the lowest. For example, you want to see the profit margin for each product line from the least profitable to the most profitable.

Procedure

1. Open a visualization.
You can sort the data in either the x-axis or y-axis, depending on what type of data is in an axis.
2. Right-click the axis label of the column that you want to sort.
3. Click **Sort**.
4. Select how you want to sort the data:

- **Ascending**
 - **Descending**
5. To return to the default sort order, select **Auto (none)**.
 6. To create a custom sort order, select **Custom**. For more information, see “Custom sorting” on page [139](#).

Sorting in alphabetical order

Organize the data by sorting it into alphabetical order. For example, you want to see employees in alphabetical order. Only columns that are categorical can be sorted by label. Numeric columns, such as revenue, are sorted by value.

Procedure

1. Right-click the axis label of the column that you want to sort.
You can sort the data in either the x-axis or y-axis, depending on what type of data is in an axis.
2. Click **Sort**.
3. Select how you want to sort the data:
 - **Ascending**
 - **Descending**
4. To return to the default sort order, select **Auto (none)**.
5. To create a custom sort order, select **Custom**. For more information, see “Custom sorting” on page [139](#).

Custom sorting

Create a custom sort order that is not governed by the data and does not require a calculation.

Before you begin

If any of the following apply to your data, you might not see all the items in the list you assemble for a custom sort:

- The data in a visualization might get clipped and can affect your custom sort.
- There is an applied filter that removes an item in your list.
- An item in your list no longer exists in the data.

Note: Consider the following implications of custom sorting:

- If you select too many items in your custom sort, performance can be degraded.
- When you copy and paste a visualization from a dashboard to a report, custom sorting is not applied to the visualization in the report.

Procedure

1. Open a visualization.
2. Click the **Fields** icon .
3. From the column that you want to custom sort click the menu *** icon.
You can sort the data in either the x-axis or y-axis, depending on what type of data is in an axis.
4. Click **Sort > Custom**.
5. From the **Create custom sort** window, complete the following steps:
 - a) From the **Available items** list, select items to sort.
 - b) From the **Custom sort order** list, drag items and place them in the order you want.

- c) From the **Sort remaining items by** list, select how you want the remaining items that are not in your custom sort order list to be displayed.
- d) Click **Create**.

Results

Your custom sort order is displayed in the visualization.

What to do next

If you want to remove a custom sort, Ctrl+click the axis label, click the sort icon, and select an option other than **Custom** from the list. For example, select **Sort ascending**.

Formatting

You can customize a dashboard, story, or visualization by changing its visual properties.

Working with the legend

A legend is a key to the items in the visualization. The legend appears if there's a column in the **Color** data slot or **Size by** data slot.

About this task

If there are too many items in the legend to be displayed an ellipsis is displayed.

Procedure

1. Click the visualization, then click **Properties**  in the toolbar.
If you don't see **Properties**, turn on the **Edit** mode  in the dashboard.
2. Select the visualization which properties you want to change.
3. In the **Properties** pane, click the **Visualization** tab.
4. Expand the **Legend** group of properties.
5. Using the different properties, change the legend appearance and text format of the title and labels.

For example, to change the location of the legend, use the **Legend position** property. To hide the legend, turn off the **Show legend** property. To specify the maximum number of items to display in the legend, use the **Maximum items in legend** property.

Changing colors

You can change colors in the entire dashboard or story, in a visualization, or in widgets that you added to a dashboard or story.

- For the dashboard or story, you can change the visual theme, the color palette, and the background color.
- For visualizations, you can change the color palette, the color used in the elements (such as bars, bubbles, or lines), the fill color, and the border color. You can also make the visualizations more transparent or opaque.
- For shape and text widgets, you can make the widget more transparent or opaque, change the fill color, and change the border color.

Procedure

1. Click the **Properties** icon.


If you don't see the **Properties** icon, Click the **Switch to edit** icon.



2. For the entire dashboard or story, ensure that nothing else has focus by clicking the background, away from any visualization or object and complete one or more of the following actions in the **General** tab:

| What to change | Actions |
|---|---|
| The theme of the entire dashboard or story | Click Color and theme , and under Visual theme select a different theme. |
| The background color of the entire dashboard or story | Click Color and theme , and under Background color select a new color. Optionally, click Select custom color and use the color picker to create your own background color. |

3. For visualizations, click the visualization that you want to work with and complete one or more of the following actions:

| What to change | Actions |
|---|--|
| The color palette used in a visualization | In the Visualization tab, click Color > Change color palette and select a new palette. Optionally, click Change heat palette to change the heat scale order. For more information on color palettes, see " Creating a color palette " on page 142. |
| The color of the elements of a visualization (such as bars, bubbles, or lines) if the visualization does not use the Color data slot | In the Visualizations tab, click Color > click Element color and select a new color. |
| How transparent or opaque a visualization is | In the General tab, move the Opacity slider. |
| The fill color for a visualization | In the General tab, click Fill color and select a new color. Optionally, click Select custom color to create your own color with the Color picker . |
| The border color for a visualization | In the General tab, click Border color and select a new color. Optionally, click Select custom color to create your own color with the Color picker . |

4. For shape and text widgets that you added to the dashboard or story, select the widget that you want to work with and complete one or more of the following actions in the **General > Appearance** tab:

| What to change | Actions |
|--|--|
| How transparent or opaque a shape or text is | Move the Opacity slider. |
| The fill color for a shape or text | Click Fill color and select a new color. Optionally, click Select custom color to create your own color with the Color picker . |
| The border color for a shape or text | Click Border color and select a new color. Optionally, click Select custom color to create your own color with the Color picker . |

Creating a color palette

As a report, dashboard, or story author, you can create custom color palettes while you work on the canvas.

About this task

You can create the following types of color palettes:

Categories

Used for visualizations that support discrete colors, like a bar or pie chart.

Continuous

Used for visualizations that support color transitions, like a map or a heat map.

Some visualizations support both types of color palettes. For example, if you drop a measure on to the color slot of a bar chart, you can add a color gradient to the bars for that measure. The following visualizations support both types of color palettes:

- Bar, floating bar, stacked bar
- Floating column, stacked column
- Bubble, packed bubble, hierarchical packed bubble
- Marimekko
- Radial
- Scatter plot
- Tree map

Color palettes are grouped into the following categories:

Custom

Created by a user (report, dashboard, or story author). Available only to the user who created them.

Global

Created by the system administrator. A global palette is available to all users but only an administrator can modify it. A user can duplicate a global palette and then modify the duplicated version. For more information about global palettes, see *Creating a global color palette* in the *Managing User Guide*.

System

Default palettes available in IBM Cognos Analytics. A system palette can't be changed but a user can duplicate it and then modify the duplicated version.

Procedure

1. Make sure that a visualization is selected on the canvas.
2. Do one of the following things, depending on your role:

| Role | Action |
|----------------------------------|---|
| Report author | Click Show properties . Under COLOR PALETTE , click the 3 dots icon for a property. Click Change custom palette  . |
| Dashboard or story author | Click Properties . The visualization can have one or both of a categorical color palette or a continuous color palette. Click Change custom palette  . |

If you're working on a visualization that uses discrete colors, like a bar or pie chart, then the **Create categorical color palette** window opens. If you're working on a visualization that uses color transitions, like a map or a heat map, then the **Create continuous color palette** window opens.

3. Enter a name for your palette.
4. Click the **Grid** or **Wheel** tab.

In the **Grid** tab, you can select colors from a grid of color swatches. In the **Wheel** tab, you can select a color by doing one of the following things:

- Clicking the color wheel
- Typing the color in HSB (hue, saturation, brightness) or RGB (red, green, blue) notation
- Typing the color in hex code

5. Under **Color guide**, click **Automatic** or **Custom**.

Categorical color palette

Contains a set of swatches. In **Automatic**, when you select a color from the grid or wheel, all swatches in the palette are filled with colors that are related to the color you selected, starting from the currently selected swatch. In **Custom**, you must select each swatch and then select a color for it.

Continuous color palette

Contains one continuous swatch. In **Custom**, when you select a color from the grid or wheel, the swatch is filled with the color you selected. The color gradually increases in intensity from one end of the swatch to the other. **Automatic** is not available for a continuous color palette.

6. To undo a selection, click **Remove swatch** .
7. To add more swatches to the palette, click **Add swatch** .
8. To reverse the colors in the palette, click **Reverse palette** .
9. Click **Save** when you are finished.

Results

The color palette appears under **Custom**. You can now apply it to visualizations.

Matching color palettes on multiple visualizations

When multiple items on the canvas share a category or value, use the **Color consistency** advanced setting to automatically adjust the visualization colors to match each other.

Procedure

1. Open a dashboard.
2. On the app bar, click the **Properties**  icon.
If you don't see the **Properties** icon, click the **Switch to edit**  icon.
3. Click **Advanced**.
4. Click the **Color consistency** toggle to enable or disable the setting.

Changing the axis

You can change the axis by rotating the axis labels, adjusting the scale of the axes to include or exclude zero, and showing or hiding the names of columns that appear in the axis titles.

Procedure

1. Click the **Properties** icon.

If you don't see the **Properties** icon, click the **Switch to edit** icon.

2. On the **Visualizations** tab open the **Axis** section.
3. Complete one or more of the following actions:

| Goal | Actions |
|---|---|
| Set the item axis label orientation | Select an option from the Item axis label orientation menu: <ul style="list-style-type: none"> • Automatic • Horizontal • Vertical • Rotate 45 degree • Stagger |
| Exclude the zero from the axis scale. | Clear the Show zero origin check box. |
| Maintain the axis scale | Use the option Maintain axis scale when you want to maintain the axis scale the same if you for example apply a filter. |
| Hide the column headings in both axes. | Clear the Show axis titles check box. |
| Hide the column heading in the axis that shows measures, such as revenue, quantity sold, or profit. | Clear the Show value axis title check box. |
| Hide the column heading in the axis that shows items, such as years, products, or customers. | Clear the Show item axis title check box. |
| Specify the title of the item axis. | Type a title in the Item axis title field. |
| Specify the title of the value axis. | Type a title in the Value axis title field. |
| Swap the axis. | Use the option Transpose . |

Improving the visibility of labels

You can change the visibility of the labels in some visualizations, by adding a shadow or changing the contrast.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. Click the **Visualization** tab and then click **Chart**.
3. Complete one or more of the following actions:

| Goal | Actions |
|-------------------------------------|---|
| Increase the contrast of the labels | Select the Contrast label color check box. |
| Add a shadow to the labels | Select the Label shadow check box. |

Adding labels in the visualization

You can add labels to the visualization itself so that you can easily see the data for each data point.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. Click the **Visualization** tab and then click **Chart**.
3. Ensure that the **Show value labels** check box is selected.
4. From the **Value label format** box, select **Value**, **Percentage of category**, or **Percentage of color**.

Changing the label orientation

You can change the orientation of the labels on the horizontal axis in some visualizations.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. Click the **Visualization** tab and then click **Axis**.
3. Select an orientation from the **Item axis label orientation** menu.

| Orientation | Meaning |
|-------------------|---|
| Automatic | The best label orientation is determined for you, based on available space. |
| Horizontal | The label orientation is horizontal. |
| Vertical | The label orientation is vertical. |
| Rotate 45 degrees | The label orientation is rotated 45 degrees clockwise. |
| Stagger | The labels are arranged of two lines in a horizontal way. |

Changing the label format for pie visualizations

You can change the format of the labels in pie visualizations.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. Click the **Visualization** tab and then click **Chart**.

3. Select a format from the **Item label format** menu.

| Format | Meaning |
|--------------|--|
| Item | The item label is displayed. |
| Value | The item value is displayed. |
| Both | Both the item label and the value are displayed. |

Changing the value label location

You can change the orientation of the labels on the horizontal axis in some visualizations.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. Click the **Visualization** tab and then click **Chart**.

3. Select a location from the **Value label location** menu.

| Value label location | Meaning |
|----------------------|---|
| Inside base | The label location is on the inside next to the base. |
| Outside end | The label location is on the outside of the base. |
| Center | The label location is in the center. |
| Inside end | The label location is on the inside end. |

For pie visualizations the following locations are available:

| Value label location | Meaning |
|----------------------|--|
| Callout | The label location is on the outside of the slices with a callout. |
| Center | The label location is in the center of the slice. |
| Center horizontally | The label location is horizontally in the center of the slice. |
| Outside | The label location is on the outside of the slice. |

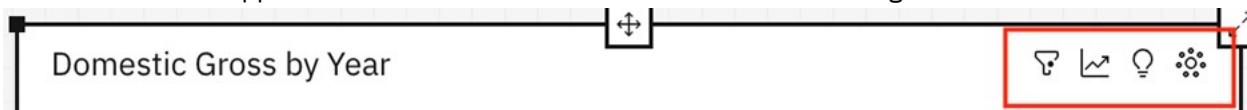
Hiding or showing icons in the visualization header

You can hide icons in the visualization header if they interrupt the flow of the title text when the title is long. Or you might prefer not to expose the functionality that the header icons represent to users.

You can manage, for all or selected visualizations in the dashboard, the visibility of these icons:

- Filters
- Forecast
- Insights
- Narrative insights

The icons that can appear in the visualization header are shown in this image:



Managing the visibility of the icons in all visualizations

To hide or show the header icons in all visualizations in your dashboard, follow these steps:

1. Open a dashboard.
2. Turn on the **Edit** mode.
3. Click the **Properties** icon to open **Dashboard properties**.
4. In **Dashboard properties**, expand the **Visualization header icons** section.
5. Turn on or off any of these properties: **Hide filters**, **Hide forecast**, **Hide insights**, and **Hide narrative insights**.

Managing the visibility of the icons in a selected visualization

To hide or show the header icons in a selected visualization, follow these steps:

1. Select a visualization in the dashboard.
2. Click the **Properties** icon .
3. On the **Visualization** tab, expand the **Visualization header icons** section.
4. For any property in the section: **Filters**, **Forecast**, **Insights**, and **Narrative insights**, select one of the values:
 - **Default** - inherits the value that is set for this property in the dashboard.
 - **Show** - shows the icon even if the related property is turned off for the dashboard.
 - **Hide** - hides the icon even if the related property is turned off for the dashboard.

Connecting data points with smooth lines

You can show data points connected by smooth curves in an area, line and column, or line visualization.

Procedure

1. Select the area, line and column, or line visualization that you want to work with.
2. Click the **Properties** icon .

If you don't see the **Properties** icon, click the **Switch to edit** icon.



3. Click the **Visualization** tab and then click **Chart**.
4. To connect the data points by smooth curves, select the **Smooth lines** check box.

Set the interpolation between data points in a visualization

You can set how data points interpolate in an area, line and column, or line visualization.

Procedure

1. Select the area, line and column, or line visualization that you want to work with.
2. Click the **Properties** icon .

If you don't see the **Properties** icon, click the **Switch to edit** icon.



3. Click the **Visualization** tab and then click **Chart**.
4. To set the way how the data points connect in your chart, select an option from the **Interpolation** menu:

| Option | Description |
|----------------------|--|
| Basis | Interpolates with a curve that uses the data points as control points for the curve. The curve does not touch the points. |
| Basis open | |
| Cardinal | Interpolates with a curve that uses the datapoints as points for the curve. The curve runs through all of the points (default for smooth). |
| Cardinal open | |
| Linear | Connects all points with a set of straight lines. |
| Step | Creates a discrete step up between successive points, where the vertical line starts at the midpoint between the two points. |
| Monotone | |
| Step before | Creates a discrete step up between successive points, where the vertical line starts at the first point. |
| Step after | Creates a discrete step up between successive points, where the vertical line starts at the last point. |

Using a different symbol

You can change which symbol is used in a line and column visualization or a line visualization.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. Click the **Visualization** tab and then click **Chart**.
3. If you need to show symbols, select the **Show markers** check box.
4. From the **Marker shape** box, select a different symbol for the marker.

Changing the size or color of bubbles

A bubble visualization shows relationships among columns that contain numeric values. The bubbles appear in different sizes and colors based on the values in specified columns.

Procedure

1. To make the bubbles different sizes based on a column, add a column to the **Size** data slot.
2. To change the color of the bubbles, add a column to the **Color** data slot or change which column is used.

Changing the orientation of a word cloud

The word cloud visualization can be shown horizontal, vertical, angled, both horizontal and vertical, or any.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. Click the **Visualization** tab and then click **Chart**.

3. Select the orientation that you want from the **Word orientation** box.

Showing or hiding grid lines

You can show or hide the grid lines that appear in the background of some visualizations.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. Click the **Visualization** tab and then click **Chart**.

3. To hide the grid lines, clear the **Show grid lines** check box. To show them, select the **Show grid lines** check box.

Disabling the footer

You can hide the footer that is displayed on some dashboards. For example, a footer is displayed when at least one visualization is using data from IBM Db2®.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. To hide the footer, under **Footer**, click the **Show footer** toggle to disable the setting.

Showing or hiding padding

You can show or hide the empty space that appears between parts of the data points in some visualizations. This is called padding.

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. Click the **Visualization** tab and then click **Chart**.

3. To disable the padding clear the **Disable padding** check box.

Working with objects

You can work with objects, such as visualizations and widgets, that are on the canvas.

Procedure

1. Select the object that you want to work with.

If you don't see icons for the object, click the **Switch to edit** icon.



2. Complete one or more of the following actions:

| Goal | Actions |
|-------------------|---|
| Group objects | Select several objects and click the Group icon. A square icon with a smaller square inside and a plus sign at the bottom right. |
| Align objects | Select an object and click the Align icon. A square icon with a plus sign inside. |
| Ungroup objects | Select the group and click the Ungroup icon. A square icon with a minus sign inside. |
| Layer objects | To place the object behind other objects, click the Send to back icon. A blue square icon with a white square inside. To place the object on top of the other objects, click the Bring to front icon. A blue square icon with a white square inside. |
| Move objects | Click and hold the Move icon and drag the object to its new location. A blue square icon with a white crosshair inside. |
| Duplicate objects | Click the Duplicate icon and then move the object to a new location. A square icon with a copy symbol inside. |
| Resize objects | Drag one of the squares on the border of the object. |
| Delete objects | Click the Delete icon. A trash can icon. |

Changing the layout of an object in a dashboard

You can specify a horizontal and vertical alignment for an object in a dashboard to determine where they appear.

You can also specify the position and its degree of rotation of objects.

Note: It depends on the object whether you can change its layout.

Procedure

1. Click the **Properties** icon.

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If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. On the **General** tab, open **Layout**.

3. In the **Layout** section, set one of the following:

- Align
- Position
- Size
- Rotate

Formatting text in a crosstab or table

You can style the text of column headers, row headers, and cells in a crosstab or table.

About this task

You can apply your style to various groups of crosstab or table elements.

Crosstabs

To apply your style to all column headers, right-click a single column header.

To apply your style to all row headers, right-click a single row header to open a context menu.

To apply your style to all cells, right-click a cell.

To apply your style to the entire column, the header and all cells in the column, first left-click the header of the column, then right-click the selected column.

To apply your style to the entire row, the header and all cells in the row, first left-click the header of the row, then right-click the selected row.

Tables

To apply your style to all column headers, right-click a single column header.

To apply your style to all entire rows, right-click an element of a row.

After you right-click an element or a selected group of elements in a crosstab or table, the context menu appears.

Procedure

1. Select **Style text** in the context menu.

2. In the **Style text** pane, change one or more of the following properties:

- Font family
- Font size
- Color
- Style
- Alignment

3. If you want to cancel your changes to style, click **Restore defaults**.

4. Click **Save** to apply your style.

Wrapping text in a crosstab

In a crosstab, allow long words in header rows and columns to break and wrap onto the next line. Wrap text is turned off by default.

Procedure

1. Ctrl+click a header row or column in a crosstab.
2. From the list, select **Style text**.



3. Under **Alignment**, click the **Wrap text** icon.
4. Click **Save**.

Selecting multiple objects

Select multiple widgets and visualizations by using your mouse cursor to group or move multiple items together. For example, you might want to change the color or set the alignment for several widgets without having to edit each widget individually. You can change the fill color in the widget properties or choose an alignment option for all of the selected widgets at one time.

About this task

You can select multiple items with a mouse drag in both edit and preview mode.

Tip: If you want to select objects in preview mode, enable the **Show selected border in preview** property in edit mode for the objects that you want to select. Doing so helps you to identify selected items when you lasso around them in preview mode.

Procedure

1. Click anywhere on the canvas and drag your mouse cursor around the objects that you want to select.
All items within the lasso you created are now selected.
2. For all of the selected items, edit the alignment or other properties.

Data properties

You can adjust the appearance of data in an asset, such as how it is aggregated or what the column headings are. If you want these changes to affect all assets, you must make them in the data asset itself.

Changing how data is aggregated

You can change how numeric data is summarized or aggregated. IBM Cognos Analytics assigns a default aggregation type to numerical columns when a data asset is imported. For example, the default aggregation for a column called "Age" is average. The default aggregation for column called "Revenue" is sum. When you use a column in a visualization, the default aggregation is used.

Procedure

1. Click the **Sources** icon.



If you don't see the **Sources** icon, click the **Switch to edit** icon.



2. In the **Data** pane, click the **Menu** icon for the column that you want to modify, and click **Properties**.

...

3. Click **Aggregate**, and choose another method:

Total

The total value for the selected column.

Average

The average value of the selected column.

Minimum

The lowest value in the column.

Maximum

The highest value in the column.

Count

How many rows are in the selected column. Blanks are not included in the count but duplicates are included. For example, if a city appears in 10 rows, it is counted each time that it appears.

Count distinct

How many unique rows are in the selected column. Duplicate rows are counted once. For example, if a city appears in 10 rows, it is counted only the first time that it appears.

Modifying the data format

From the **Sources** pane, you can select a different data format type and specify its properties.

About this task

The default data format type is inherited from the data source.

Procedure

1. Click the **Sources** icon.



If you don't see the **Sources** icon, click the **Switch to edit** icon.



2. In the **Data** pane, click the **Menu** icon for the column that you want to modify, and click **Properties**.

...

3. Click **Data format**.

4. Select an option from the **Format type** list.

5. Select an option from each list that appears for the format type that you chose.

6. Click **OK**.

Data caching

You can configure data caching to improve dashboard performance.

Data caching is done through server-side caching and browser-side caching. Dashboards run only under Dynamic Query Mode (DQM), which means that even for supported Compatible Query Mode (CQM) data sources, Cognos Analytics converts data sources at run time to run in the DQM infrastructure. For relational database sources, you must configure Cognos Analytics to connect to the data source through a JDBC driver.

If a dashboard does not present data in real time each time you open the dashboard, you might need to perform one of the following:

- Disable server-side caching.

- Disable [browser-side caching](#).
- Disable both server-side and browser-side caching.

Server-side caching

Server caching stores result sets from dashboard queries on the Cognos Analytics servers for reuse if the following requirements are met:

- The users that run the queries match the same or compatible query pattern.
- The security profile and data source connection profile both match. That is, the user has permission to access the same data source connection, and sign-on information that is configured for the data source and the data security that is defined in the model matches.

Storing result sets like this improves performance and makes sure that the data is secure.

Server caching works with the data cache configuration that is specified by the modeler in a Framework Manager model or in a data module. By default, the cache behavior for a new dashboard is set to Automatic, which means that the dashboard uses the model's default setting for caching. You can override this default behavior in the dashboard by changing its configuration. For more information about configuring a dashboard's server-side cache behavior, see [“Enabling server-side data caching” on page 155](#).

In Framework Manager, you can configure the default cache behavior in the project governors with the **Allow usage of local cache** property. For DQM models, you can configure a query subject's properties in further detail using the **(DQM) Use local cache** property. For more information about setting up caching in a data module, see *Enabling data caching* in the *IBM Cognos Analytics Data Modeling Guide*.

Note: If you have large dashboards that use data sources with a configured server-side cache, you can increase the DQM cache size to improve performance. While you cannot configure DQM from the dashboard, you can change the DQM cache size from the Administration console. Increasing the cache size allows the DQM to handle more concurrent queries, but increases resource usage. For more information, see *Changing the cache size of dynamic queries* in the *IBM Cognos Analytics Installation and Configuration Guide*

Browser-side caching

Browser-side caching operates independently of the server-side DQM cache. Configure browser-side caching by using the **Configure local cache** property in **Advanced properties** of each dashboard.

Browser-side caching uses the web browser to store query data on the client side to improve performance, which mitigates the need to go back to the data source or to the DQM server-side cache, if it exists. Browser-side caching uses the browser to store data on the client. When browser-side caching is enabled, the client application stores query results in the local browser. Storing the query results eliminates network traffic and server processing time. Each time that you open the dashboard, the dashboard retrieves information from Cognos Analytics and caches this data on the browser side. As you interact with the dashboard, the dashboard uses the cache while your actions do not require the dashboard to retrieve more data from the data sources. The cache is only active during the dashboard session.

Note: Browser-side caching is not available in Cognos Analytics reports.

You can also configure and refine specific data caches and data elements within those caches. If your query requirements are not in the configured browser-side caches, the dashboard sends the query to the Cognos Analytics server and retrieves the data from either the data source or a DQM cache, if it exists.

When a browser-side cache definition changes and the data are not already in the cache, the dashboard retrieves the data again and caches the data on the Save operation if you turned on the **Auto-generate on save** property. You can also manually reload a cache. For more information, see [“Specifying data elements for browser-side caching” on page 155](#).

Enabling server-side data caching

You can configure a dashboard to use server-side caching to improve performance.

Before you begin

About this task

By default, the dashboard's **Server data cache** setting is Automatic, meaning that it uses the metadata modeler configuration for caching in the metadata model. You can override the model's default server-side cache setting by changing the **Server data cache** property in the dashboard's **Advanced properties**.

Procedure

1. Click the **Properties** icon.


If you don't see the **Properties** icon, click the **Switch to edit** icon.


2. For the entire dashboard or story, make sure that no other objects have focus by clicking the background, away from any visualization or object.
3. Expand **Advanced** and select an option from the **Server data cache** menu.

Automatic

This option is the default setting. This setting reflects the data cache setting as it was specified by the modeler in a Framework Manager package or data module.

On

This option ensures that server-side caching is on.

Note: When the property **Refresh automatically** is enabled on a visualization, data is not cached for that visualization and fresh data is retrieved at the interval as specified by the dashboard author.

No cache

This option ensures that fresh data is retrieved from the data source each time the dashboard is run or you modify a dashboard or story.

What to do next

In addition to server-side caching, you can also configure browser-side caching for further performance gains during your dashboard session. For more information, see [“Specifying data elements for browser-side caching” on page 155](#).

Specifying data elements for browser-side caching

You can configure specific data elements to be cached locally in the web browser for better performance. Data elements that are cached include data that is frequently updated during common operations, such as selecting values, sorting, and filtering.

Not every dashboard feature allows data to be cached on the browser side – and some data should not be cached. However, data that is cached on the server side and the browser side work together to provide consistent results, while they reduce the server load and improving performance.

About this task

To tune your browser-side caching, you can create separate data caches, then apply different caching rules to each one. By [enabling and disabling](#) different data caches, you can discover the combination of enabled data caches that works best for your dashboard.

When browser-side caching is enabled, Cognos Analytics uses the feature where possible. In use cases where this caching is not possible, queries are sent to the Cognos Analytics servers, but might still use server-side caching from their query services.

Note: The total size of all browser-side caches cannot exceed 100 MB of browser memory. This limit makes sure that the caches do not use a high number of browser resources. If your browser-side caches reach this size limit, any caches that did not finish generating stop generating and the dashboard displays the following error message: The size of this data cache exceeds the overall size limit for all caches (<size_in_bytes>). Apply a filter to reduce the size.

The size that is stated in the error message is the amount of browser memory that all caches consume and not the system memory of your client workstation. You can add filters to reduce the overall size

of your browser-side caches and avoid reaching this size limit by clicking the **Filter** icon  that is associated with any categorical column. For example, if your dashboard requires data for only two years, you can filter on those two years to make sure that the cache retrieves only that data.

Limitations

Limitations of this feature include the following items:

- Crosstab visualizations where null suppression is turned on
- Crosstab visualizations where summary rows and columns are shown
- Top or bottom filters
- Navigation paths
- Model Filters and Parameters
- Insights/Forecasting
- Tables with Ranks applied
- Cognos Explorations/Stories
- Tables with Average summaries
- Count distinct aggregation type
- Grouping
- Widgets and visualizations that are set to automatically refresh

Procedure

1. Click the **Properties** icon.



If you don't see the **Properties** icon, click the **Switch to edit** icon.



2. For the entire dashboard or story, make sure that no other objects have focus by clicking the background, away from any visualization or object.
3. Expand **Advanced**, and then next to **Configure local cache**, click **Edit**.
4. In the **Configure data caching** pane, click **Auto create data caches**.

One or more objects, named **Data cache n** appear. The number of queries, columns, and filters appears under its name.

← Configure data caching (1) :

Auto-generate on save 

 Loaded  Not loaded

 Loading  Error

 Data cache 1 

Queries: 0 Columns: 4 Filters: 0 :

Click the **Action** icon  to the right of each cache to reload, delete, or duplicate the cache. Duplicating a cache can give you a starting point for a new cache that you might want to configure differently.

Troubleshooting : If the **Auto create data caches** process does not complete, you might need to update certain HTTP Server configuration files. For information about resolving this issue, see ['Auto create data caches' progress starts but does not complete configuring data caches](https://www.ibm.com/support/pages/node/6997029) (<https://www.ibm.com/support/pages/node/6997029>).

5. To see details of the columns currently designated for caching, click a **Data cache n** link.

The column names are listed.

Note: When data caches are auto-created, all available columns are initially listed for caching.

- To remove a column from the list, click the trash can icon  next to the column name.
- To restore a column to the list, click the **Add** icon , select a column from the list, and then click **Add**.

Tip: If nothing happens after you click the **Add** icon , there are no more columns available to add.

6. To see which widgets currently have columns that are designated for caching – and therefore perform faster – click the **Widgets** tab.

The widget names are listed.

Note: When data caches are auto-created, all available widgets with cached columns are initially listed.

- To remove a widget from the list, click the **Columns** tab and [remove any columns associated with the widget](#).
- To restore a widget to the list, click the Add icon , select a widget with columns not currently in this data cache, and then click **Add**.

Tip: If nothing happens after you click the **Add** icon , there are no more widgets with uncached columns available to add.

7. To create another data cache, in the **Configure data caching** pane, click the Action icon , click **Add data cache**, and then configure another combination of [cached columns](#) and [widgets](#).

8. After you determined the combination of data caches that provides the best overall performance, you can enable them and then disable the rest by choosing one or both of these options:

- In the **Configure data caching** pane, click the **Action** icon , and then click **Enable all** or **Disable all**.
- Select the toggle icon  next to one or more data caches to enable or disable the caching rules that you configured for that data cache.

Tip: If you created your dashboard in Cognos Analytics 12.0, the **Auto-generate on save** option is enabled by default. When this option is enabled, the browser-side cache is generated each time that you save your dashboard.

 **Configure data caching (4)** 

Auto-generate on save 

If your dashboard was upgraded to version 12.0, the **Auto-generate on save** option is disabled by default. However, you can enable it if you want.

Forecasting

Use forecasting in IBM Cognos Analytics to discover and model trend, seasonality, and time dependence in data.

You can forecast in IBM Cognos Analytics by using automated tools that model time-dependent data. Automated model selection and tuning makes forecasting easy to use, even if you are not familiar with time series modeling.

Forecasts and their confidence bounds are displayed in visualizations as a continuation of historic data. You can also view the statistical details for generated models if you want to see the technical background.

Specifying time series in forecasts often requires data manipulation. Cognos Analytics supports a wide range of time series without the need for manipulation, ranging from standard date and time types, to nested periodic and cyclical time fields. When data is recognized as a time series, data preparation is automated. Appropriate trend and seasonal periods are detected, and models are selected from a set of nine different model types.

You can forecast in line, bar, and column visualizations. Forecasting allows analysis of hundreds of time series per visualization. Forecasts and confidence bounds are computed for each time series, and displayed in the visualization as extensions of the current data. You can inspect each time series separately, and tailor the forecast and results to your own data and requirements.

If you are familiar with forecasting models, you can view the selected model type, estimated model parameters, standard accuracy measures, and processing summary information.

Note: In Cognos Analytics 12.0.2 and earlier versions, the **Forecast** feature is not available in dashboards that are created from OLAP-sourced data modules, such as data modules created from Planning Analytics cubes. Only dashboards that are created from OLAP-sourced, enriched packages support forecasting in these versions of Cognos Analytics. For more information, see [“Creating an enriched package from a Planning Analytics cube” on page 45](#).

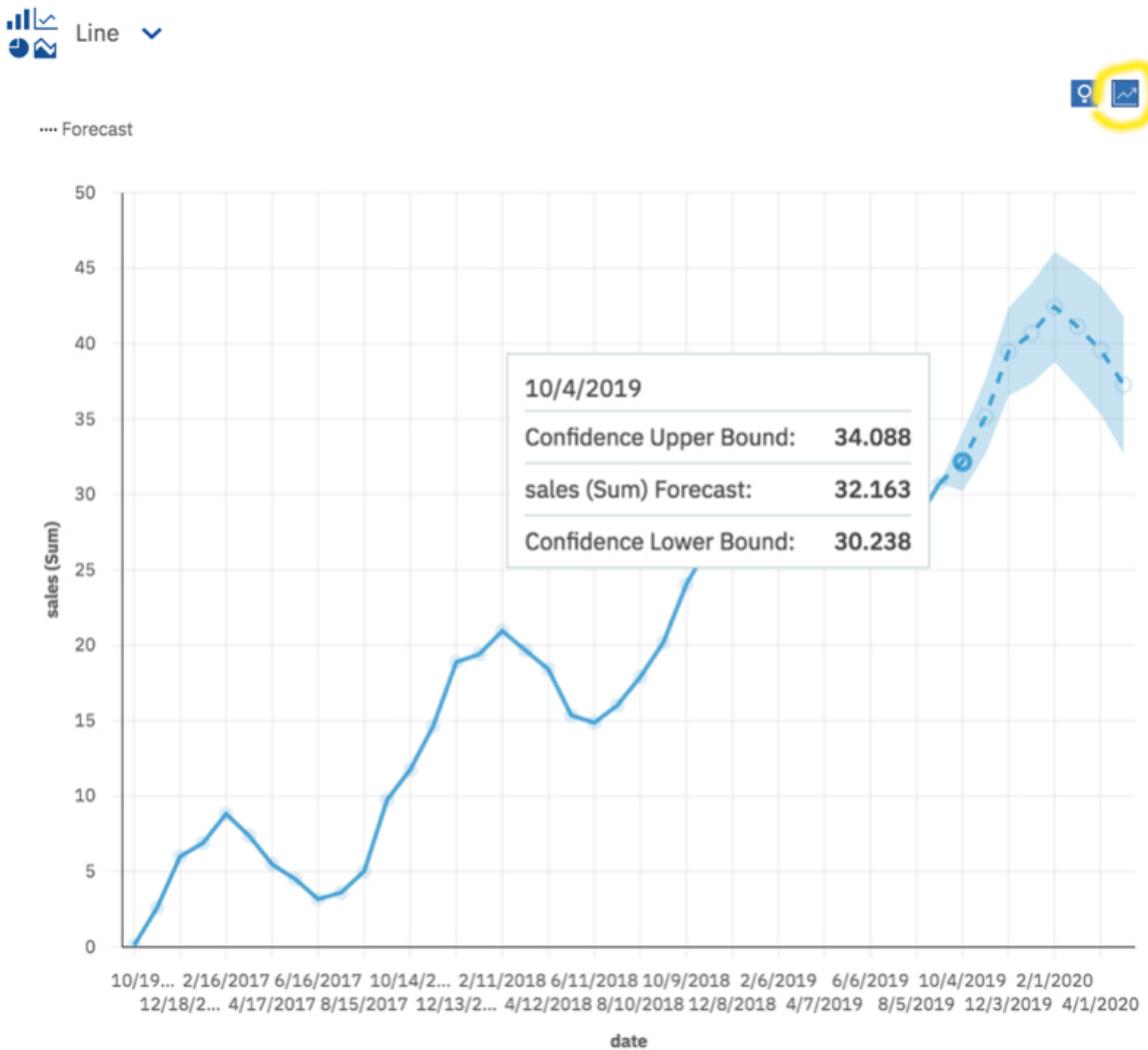
Starting with Cognos Analytics 12.0.3, dashboards that are created from OLAP-sourced data modules support forecasting.

Forecasting features

Forecasting provides time series data modeling and forecasts based on data in visualizations.

To use forecasting, the visualization must be either a line, bar, or column visualization, the data must be supported for forecasting, and forecasting must be enabled. Click the **Forecast** icon in the visualization or the **Analytics** tab and enable **Forecast**. You can modify model and forecast settings, and confidence bounds. Appropriate time series models for the visualization are estimated, and forecasts are displayed in the visualization. You can also see the time series model specification and data processing summary in the data tray.

The following example shows forecasting values and confidence bounds in a visualization.



Forecasting options

You can modify your forecasts by setting a number of period and confidence level options in the **Analytics** panel.

The screenshot shows the 'Analytics' tab selected in the top navigation bar. Below it, the 'Forecast' section is active. It contains the following settings:

- Forecast periods:** Set to **Auto**.
- Ignored last periods:** Set to **0**.
- Confidence level:** Set to **95%**.
- Seasonal period:** Set to **Auto**.
- Optional factors to consider:** Shows **0/5**. Below this is a placeholder area with the text **Click or drag data here**.
- See statistical details:** A blue link to view statistical details.
- Insights:** A toggle switch that is currently off.

A period is the smallest time interval between neighboring points in the data.

The following options are available.

Forecast periods

The number of steps to forecast ahead.

The default value is **Auto**, which is 20% of the length of the historical data. Any missing values at the end of a particular series will also be forecast, but they will not count towards the specified number of forecast periods.

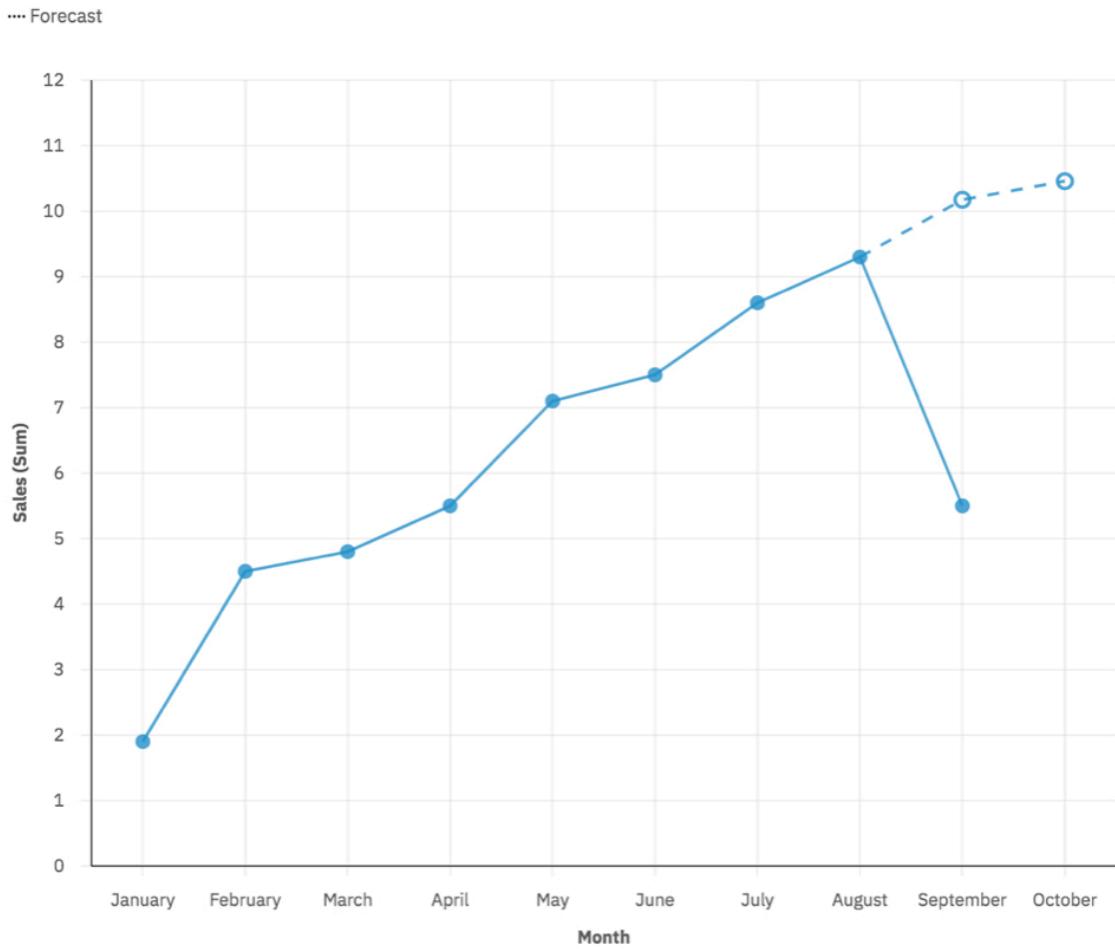
Ignored last periods

Ignores a specified number of data points at the end of a time series when building the model and computing the forecasts. Any missing values at the end of a non-ignored portion of a series will also be forecast. Ignored last periods value must be specified as a non-negative integer, such as: 0, 1, 2, 3.

The default value is 0. If there are no missing values, then all of the historical data is used in model generation and the first forecast point is after the last historical data point. Up to 100 data points can be ignored.

Ignoring the last data period can be useful when the data is incomplete. For example, you might be doing a forecast halfway through a month. Exclude this month from the forecast by setting **Ignored last periods** to 1.

The following visualization shows a forecast that ignores September's results by setting **Ignored last periods** to 1.



Confidence level

The certainty with which the true value is expected to be within the given range. You can see corresponding confidence interval in a tooltip by hovering over any forecast value. The confidence interval is displayed as upper and lower bounds.

You can select three different confidence levels: 90%, 95%, and 99%. The default is 95% and the lower and upper bound define the range at which you can be 95% confident that the true value lies within that range.

Seasonal period

The seasonality with which to build the model. Seasonality is when the time series has a predictable cyclic variation. For example, during a holiday period each year.

The default value is **Auto**. **Auto** automatically detects seasonality by building multiple models with different seasonal periods and choosing the best one.

You can specify seasonality by entering a non-negative integer, such as: 0, 1, 2, 3 as the seasonal period.

To specify a non-seasonal model, set the **Seasonal period** to 0 or 1. A model with user specified seasonality is displayed only if the seasonal model is more accurate than all of the non-seasonal models.

Insights

When visualizations have both Insights and Forecasts, you can enable both of them in the **Analytics** panel. Insights provide an independent set of analytic results. For more information, see “[Insights in visualizations](#)” on page 178.

The screenshot shows the 'Analytics' tab selected in the top navigation bar. Below it, there are two main sections: 'Forecast' and 'Insights'. The 'Forecast' section includes settings for 'Forecast periods' (Auto), 'Ignored last periods' (0), 'Confidence level' (95%), and 'Seasonal period' (Auto). It also features a placeholder for 'Optional factors to consider' with a note 'Click or drag data here' and a count of '0/5'. A link 'See statistical details' is present. The 'Insights' section is expanded, showing 'Show average value' (checked) with the message 'The average value of Food is 32,792.', and 'Show meaningful differences' (checked) with a link 'Too few categories'.

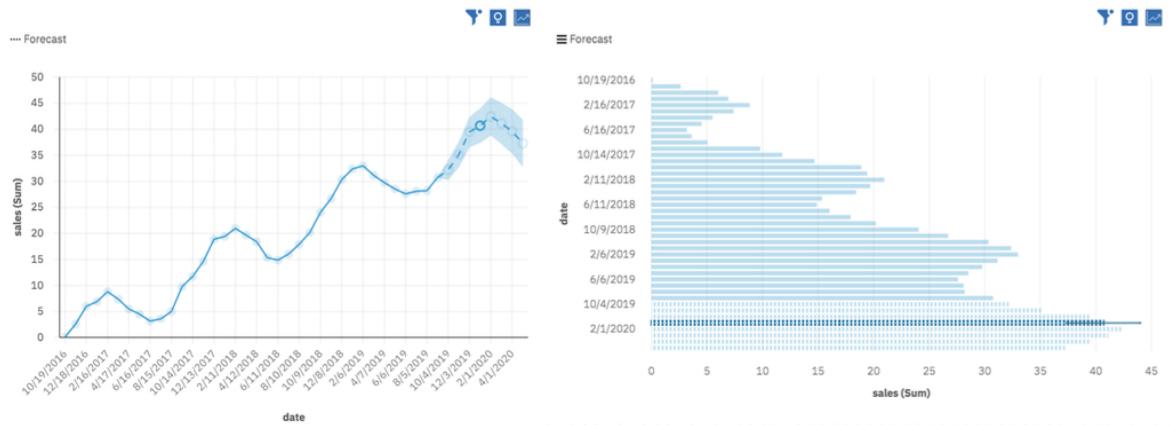
Visualization types that support forecasting

Forecasting is supported in line, bar, and column visualizations.

The following table compares the forecasting display features for each visualization.

| Forecasting features | Line chart | Bar chart | Column chart |
|--|-----------------|----------------------|-------------------------|
| Forecast points | Open circle | Striped bar | Striped column |
| Confidence interval display | Shaded region | Solid line | Solid line |
| Activate confidence interval | Click any point | Click a forecast bar | Click a forecast column |
| Number of confidence intervals displayed | All | 1 | 1 |

The following image shows a forecast on line and bar visualizations with activated bar intervals.



Insights and forecasting

Insights in visualizations provide analytic insights that can help users to detect and validate any important relationships and meaningful differences based on the data that is presented by the visualization. Insights work alongside forecasting in supported visualizations. Insights provide a separate set of analytic results, and the results are for historical values only. For more information, see [“Insights in visualizations” on page 178](#).

Note: Support for forecasting and insights is available for packages only and is not available in visualizations for data modules containing a Planning Analytics cube. However, you can use the forecasting feature in an eligible visualization with a Planning Analytics cube, if you create an enriched package from the cube. For more information, see [Creating an enriched package from a Planning Analytics cube](#).

Forecasting data

Data that is suitable for forecasting has measure values that correspond to regularly spaced time points. You specify time and measures in visualizations by dragging time fields and measure fields into visualization slots. Optionally, you can also specify group fields that split the measure values by categories.

The following table is a summary of the field types and matching visualization slots that are supported in forecasting:

| Slot | Time fields (required) | Measure fields (required) | Group fields (optional) |
|-------------------|------------------------|---------------------------|-------------------------|
| Line chart slot | x-axis | y-axis | Color |
| Bar chart slot | Bars | Length | Color |
| Column chart slot | Bars | Length | Color |

No other visualizations or visualization slots are supported, with the exception of the **Local filters** slot

Time fields in forecasting data

A time field is identified by a time icon in front of the field label in the **Data** pane.

You can specify time field properties by using the following properties: **Data type** or **Represents Time**.

Data type

A field is recognized as a time field if it has one of the following data types: Date, Time, or Timestamp. Data type is inherited from the data source and cannot be changed.

Date, Time, and Timestamp data types are designed to support the full range of date and time formats that are covered by the ISO 8601 basic and extended formats. The following table shows the supported data types together with an example of format and a data example for each.

| Data type | Format example | Data example |
|-----------|-----------------------|---------------------|
| Date | yyyy-mm-dd | 2019-07-01 |
| Time | hh:mm:ss | 12:34:56 |
| Timestamp | yyyy-mm-dd'T'hh:mm:ss | 2019-07-01T12:34:56 |

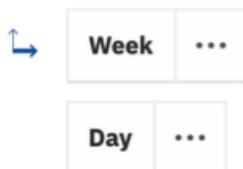
Represents Time

A field is recognized as a time field if the data property **Represents** is set to **Time**. Text and Integer fields that contain time data are also recognized as time fields. Time fields are defined automatically during data import or enrichment. The possible definitions are Date, Year, Quarter, Season, Month, Week, Day, Hour, Minute, or Second.

If time fields are not recognized automatically, you can specify them as time fields. Ensure that the field values are in one of the supported formats, otherwise you might receive an `Unsupported date format` error.

Nested time fields

You can drag multiple time fields into the same visualization slot to specify a nested time field. For example, a field that represents Week can be dragged into the slot along with a field that represents Day to create a forecast by Days of the Week.



Nested fields in the slot must be in time hierarchy order. For example, Week must be placed above Day.

Nested fields cannot skip levels in the time hierarchy that would result in ambiguity. The following table describes acceptable hierarchies.

| Time field | Acceptable lower fields |
|-------------------------------|---------------------------|
| Year | Quarter, Month, Week, Day |
| Quarter | Month |
| Month | Day |
| Week | Day |
| Day (of Year, Month, or Week) | Hour, Time |
| Hour | Minute |
| Minute | Second |

If Year is absent in the time hierarchy, then the system defaults to the current year. This can cause issues due to differences between leap and non-leap years. Consider providing the Year in such instances.

Chronological data order

Specified time fields define a chronological order for the time points in the visualization. They are used to sort the points on the visualization in chronological order when forecasting is enabled. The chronological

order includes the historical points, along with the new forecasted points. Any other sorting criteria that are specified for the visualization are ignored when forecasting is enabled. For example, the first day of the week is always Sunday even if you specify Monday as the first day of the week in the custom sort order.

Any invalid time labels are moved to the beginning of the sequence and excluded from building the model and computing the forecast.

Time interval detection

Time interval detection is possible when the data is ordered chronologically. The time interval is the size of the smallest interval between any two adjacent time points, such as “2 weeks”. If varying time intervals are detected, they must all be integer multiples of the smallest interval. Otherwise, the data is deemed irregular and cannot be forecast. Missing time points that arise as a result of multiple intervals are filled in for the detected interval. Corresponding measure values are set to missing. If the number of missing values is larger than 33% of the series length, a **Too many missing values** error is reported.

Measure fields

One or more fields of any type can be specified as measure fields for forecasting analysis by adding them to a corresponding visualization slot. Each measure field is analyzed separately. Multiple time series can also be specified by adding a field to the **Color** slot, splitting the measure values by the categories of the specified field.

All measure field values that correspond to the same time point are summarized by using one of the following summarization levels: **Sum**, **Minimum**, **Maximum**, **Average**, **Count**, and **Count distinct**. The field must be numeric to support **Sum**, **Minimum**, **Maximum**, or **Average** summarization. All possible data types and summarization levels are supported for forecasting. However consider the following points:

- Small number of different measure values can result in unexpected or uninformative forecasts. For example, when **Count distinct** summary is used.
- Zero measure values can unduly influence results, especially when they represent missing measurements.

Interpolating missing values

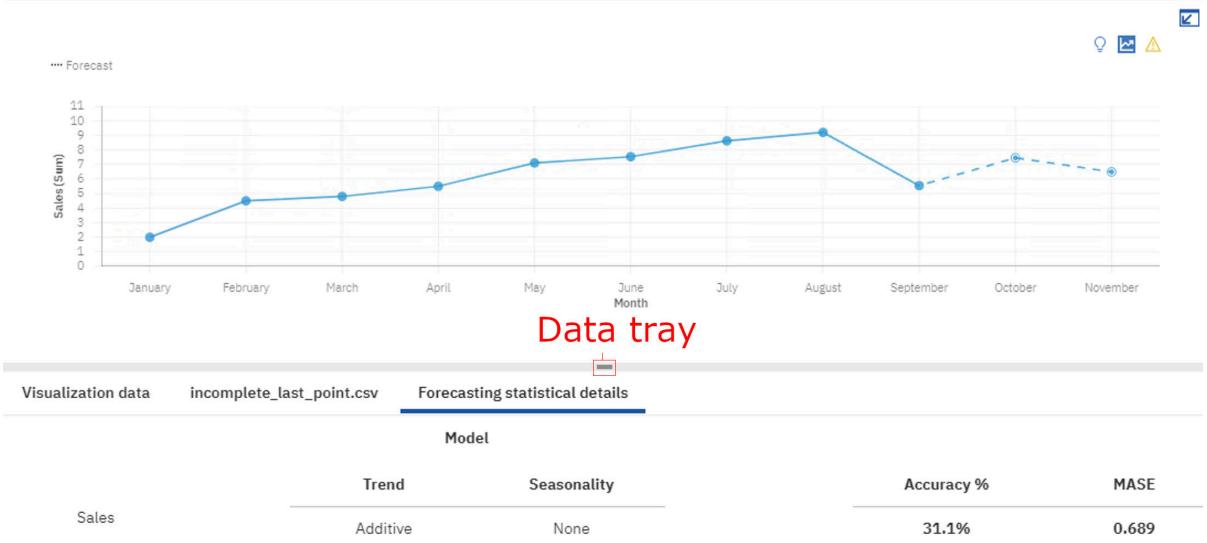
Missing values are computed and filled in by the **Linear Interpolation** algorithm. The computation is based on the nearest neighbors in a chronologically ordered time series with detected time interval. The new value is $(\text{previous value} + \text{next value}) / 2$. For example, with the values [3, 6, missing, 12], the interpolated value to replace the missing value is $(6 + 12) / 2$ or 9. The interpolation algorithm can also handle contiguous missing values.

Data points with missing values at the first or the last historical time points are excluded from the series before building a model. Missing values at the last historical time points get forecasted as well.

Forecasting statistical details

A forecasting run generates forecasts and forecasting statistical details. Forecasting statistical details are located in the data tray at the bottom of each visualization. There is a single row of statistical details for each time series in the visualization. Forecasting details are generated as long as the time points are evenly spaced.

Forecast information contains forecast **Status** for the given time series. When the status is **Success**, the other fields provide details on the model and data used for forecast. When the status is **Failure**, some of the other fields, including the **Notes**, provide details regarding the cause of the failure. Summaries of any failures are always provided in the visualization warnings.



Model information specifies the **Trend** and **Seasonality** type that is selected for estimating the time series data when successful. The following table lists the different available types.

| Trend component | Seasonal component | | |
|-----------------------|--------------------|---------------|---------------------|
| | N NONE | A ADDITIVE | M MULTIPLICATIVE |
| N NONE | (N, N) | (N, A) | (N, M) |
| A ADDITIVE | (A, N) | (A, A) | (A, M) |
| Ad ADDITIVE_DAMPED | (Ad, N) | (Ad, A) | (Ad, M) |

Model influencers

For multivariate forecasts, the **Model influencers** section explains how much factor weight each field contributed to the forecast. A higher value indicates that the field was more relevant to the forecast. A lower value indicates that the field has a lot of noise (that is, the field is more random and unpredictable) and is less relevant to the forecast.

Which fields contributed to the forecast depends on the type of multivariate forecast used: Vector autoregression (VAR) or autoregressive integrated moving average with explanatory variable (ARIMAX).

Accuracy measures

Model accuracy measures Mean Absolute Error (MAE), Mean Absolute Scaled Error (MASE), Accuracy Percent, Root Mean Squared Error (RMSE), Mean Absolute Percent Error (MAPE), and Akaike Information Criterion (AIC) are based on the time series data that is used to generate the model. All accuracy measures are based on the historical data. Accuracy measures can also be used as an indicator of the forecast accuracy, but they do not carry over to future values.

Mean Absolute Error (MAE)

Computed as the average absolute difference between the values fitted by the model (one-step ahead in-sample forecast), and the observed historical data.

Mean Absolute Scaled Error (MASE)

The error measure that is used for model accuracy. It is the MAE divided by the MAE of the naive model. The naive model is one that predicts the value at time point t as the previous historical value. Scaling by this error means that you can evaluate how good the model is compared to the naive model. If the MASE is greater than 1, then the model is worse than the naive model. The lower the MASE, the better the model is compared to the naive model.

Accuracy Percent (Accuracy %)

The primary indicator of the model accuracy based on the fitted values. It is specified as the reduction percentage of mean absolute error relative to the naïve model. It is computed by subtracting MASE from 1 and expressing it as percentage. If MASE is greater than or equal to 1, the accuracy is set to 0% because the model does not improve upon the naïve model. Higher accuracy indicates lower model error relative to the naïve model.

Mean Squared Error (MSE)

The sum of squared difference between the values that are fitted by the model, and observed values that are divided by the number of historical points, minus the number of parameters in the model. The number of parameters in the model is subtracted from the number of historical points to be consistent with an unbiased model variance estimate.

Root Mean Squared Error (RMSE)

The square root of the MSE. It is on the same scale as the observed data values.

Mean Absolute Percent Error (MAPE)

The average absolute percent difference between the values that are fitted by the model and the observed data values.

Akaike Information Criterion (AIC)

A model selection measure. The AIC penalizes models with many parameters, and so attempts to choose the best model with a preference towards simpler models. The AIC is the sum of the logarithm of non-adjusted MSE multiplied by the number of historical points and the number of model parameters and initial smoothing states that are multiplied by 2.

Parameters

Detected Seasonal period and estimates for other parameters that are used in the selected exponential smoothing model are available.

Seasonal period

The number of time steps in a seasonal period used in the exponential smoothing model.

Alpha

The smoothing factor for level states in the exponential smoothing model. Small values of alpha increase the amount of smoothing, that is, more history is considered when the alpha is small. Large values of alpha reduce the amount of smoothing, which means that more weight is placed on the more recent observations. When the alpha is 1, all the weight is placed on the current observation.

Beta

The smoothing factor for trend states in the exponential smoothing model. This parameter behaves similar to alpha, but is for trend instead of level states.

Gamma

The smoothing factor for seasonality states in the exponential smoothing model. Serves the similar role as alpha, but for the seasonal component of the model.

Phi

The damping coefficient in the exponential smoothing model. Long forecasts can lead to unrealistic results, and it is useful to have a damping factor to dampen the trend over time and produce more conservative forecasts.

Diagnostics

Information includes Missing count, Series length, Ignored periods, Trend strength, Seasonality strength, and Date/time interval.

Missing count

Indicates the number of data rows that have either missing values or missing time points and are positioned between the first and the last valid series value. Invalid time points, as well as points with missing values at the first or the last historical time points are not included.

Series length

Indicates the number of data points used for time series modeling. Only the points between the first and the last valid series value are included.

Ignored periods

An integer, m, that ignores the last m data points of the series when building the exponential smoothing model and computing the forecasts. Any missing values at the end of a non-ignored portion of a series will also be forecast. The default value for this parameter is 0, which means that all of the historical data is used in model generation when there are no missing values. A maximum potential of 100 points can be ignored. Ignored periods excludes the data points when building a model, so forecasting might fail due to factors such as minimum data length requirements and missing value proportion that exceeds 33%.

Trend strength

Compare the original model, M, with the same model, but with the trend component removed. The trend strength of M is the difference in accuracy between model M and model M with the trend component removed.

Seasonality strength

Compare the original model, M, and the same model with the seasonal component removed. The seasonality strength of M is the difference in accuracy between model M and model M with the seasonal component removed.

Date / time interval

The Date / time interval represents the detected time interval of the chronologically sorted data. The time interval is identified as the smallest difference between neighboring points in the data when sorted in the chronological order.

Forecasting models

Exponential smoothing models are a popular class of time series models.

Exponential smoothing models are applicable to a single set of values that are recorded over equal time increments only. However, they support data properties that are frequently found in business applications such as trend, seasonality, and time dependence. All specified model features are estimated based on available observed data. An estimated model can then be used to forecast future values and provide upper and lower confidence bounds for the forecast values.

Each model type is suited for modeling a different combination of properties that are found in the data. The model type that can provide the best match to the observed data is selected for modeling the observed data and is used to forecast any future values.

Model estimation algorithms

Models are specified by the smoothing equations that include the model parameters and initial smoothing states. Model parameters are estimated with values that minimize the model error.

Smoothing equations

Exponential smoothing models derive their name from the smoothing equations that specify the model. They provide formulas for computing smoothing states for each observed point by using the current observed value and the previous smoothing states. Smoothing equations provide weighted averages of the current value and the previous states in the time series. Weight for the current value or state is given by a model parameter between 0 and 1, while the weights for previous values are exponentially decreasing.

Level smoothing equations

All model types compute a level state for each time series point by using the corresponding level smoothing equation. Level states for the model without trend and seasonal components are computed as the weighted average of the time series value at the current point and the level state at the previous point. The weight that is associated with the current value is a parameter, **alpha**, with its value restricted between 0 and 1. For other models, previous trend and seasonal states are also included in the level smoothing equation.

Trend smoothing equations

Model types with additive or damped additive trend compute a trend state for each time series point by using the corresponding trend smoothing equation. The trend state for the current point is based on the difference of level states at the current and the previous point, and on the trend state at the previous point. The weight that is associated with the difference of level states at the current and previous point is a parameter that is named **beta** with its value restricted between 0 and 1. An extra parameter, **phi**, is added to the damped trend smoothing equations. **Phi** multiplies the trend state contribution from the preceding point and its value is also restricted between 0 and 1. The purpose of this parameter is to estimate the degree of trend damping from one point to the next.

Seasonal smoothing equations

Model types that support additive or multiplicative seasonality compute a seasonal state for each time series point. The seasonal states are computed by using seasonal smoothing equations. The seasonal state for the current point includes the difference of the time series value and the current level state for additive seasonality or ratio of the two same values for multiplicative seasonality. The weight that is associated with this term is a parameter, **gamma**, with its value restricted between 0 and 1. The rest of the contribution comes from the corresponding seasonal state in the previous seasonal period. Notice that the seasonal period has a fixed length, and while the seasonal state can change for each point, only matching seasonal indices from different periods are considered together in the seasonal smoothing equations.

Initial smoothing states

Values must be specified for level, trend, and seasonality states for points that precede the time series. The values are needed for the smoothing equations. To compute the various states at the first point of the time series requires state values at the corresponding previous points.

Model parameters

Each smoothing equation uses corresponding model parameters:

alpha

Controls the level states.

beta

Controls the trend states.

gamma

Controls seasonal indices across seasonal periods.

phi

An extra parameter that is used for specifying the damped trend.

All four parameters have values between 0 and 1. Higher values of **alpha**, **beta**, and **gamma** mean that more recent observations have higher weight, while lower values mean higher weights for older observations. A higher value of **phi** corresponds to a higher degree of dampening the forecast trend.

Model estimation

Model parameters in the smoothing equations are estimated based on the time series data. Parameters cannot be estimated directly by using a formula. They are estimated by an iterative process that searches for parameter values that minimize the model error. The model error is computed as Mean Absolute Scaled Error (MASE). The iterations stop when no further reduction in the model error can be achieved. Corresponding parameter values together with the initial smoothing states fully specify the estimated model. They are used to compute the model states for all other data points and generate the model forecasts by using a corresponding forecast equation.

Forecasting algorithms

A number of algorithms are used in forecasting.

One-step ahead

Every model supports one-step ahead forecasts based on the corresponding forecast equation. One-step ahead forecasts are needed to compute model errors during the model estimation process.

One-step ahead forecasts are computed sequentially for each data point by using computed level and trend states for the current point, and seasonal states for the last seasonal period.

Forecast error is computed by subtracting forecast value at the previous point from the observed value at the current point. Overall model error, which is used for estimating the model, is computed as an average value of absolute forecast errors. Smaller errors correspond to a better model fit. Accuracy measures displayed in **Forecasting statistical details** provide several model summaries of the one-step ahead forecast errors.

k-step ahead

k-step ahead forecasts are used to make predictions for any number of future values following the observed time series data. They are based on the same forecast equations as the one-step ahead forecasts for the specified model.

The number of forecast values that are generated is 20% of the length of historical data series by default. You can specify an exact number of values to be forecast in the **Forecast** dialog box. Any missing values at the end of a particular series will also be forecast, but they will not count towards the specified number of forecast periods.

Confidence bounds

Confidence bounds provide the level of uncertainty that is associated with each forecast value. The bounds typically become wider further into the future, because more distant forecasts are less reliable. Confidence bounds provide relevant insights into the future behavior of the observed time series.

Computation of confidence bounds is based on the overall variance of forecast errors that are estimated on the observed data and a factor that depends on the specified model and on the number of steps from the last observed point.

Automated model selection in forecasts

Multiple model types are used to create candidate models for each time series in a forecast. All nine available model types are normally used, except when a seasonal component is absent. There are only three model types available that do not account for seasonality in the data.

The default value, **Auto**, for the Seasonal period option detects seasonal period by comparing multiple models, each with a different candidate seasonal period.

Multiple models are compared by using a model error and the number of model parameters. For example, when model errors are equal for two models, the model with fewer parameters is preferred. The latter model provides a more condensed representation of the observed data and also tends to generate more reliable forecasts.

Creating a multivariate forecast

A multivariate forecast is a forecast that takes into consideration more than one time-dependent variable. The forecast model not only looks at historical data but also the dependencies between the specified variables to create a forecast.

In IBM Cognos Analytics, you can create a multivariate forecast that considers multiple measures in its model. To create a multivariate forecast:

1. Create a line, bar, or a column visualization.
2. Enable **Forecast** under the **Analytics** panel.

The screenshot shows the IBM Cognos Analytics interface with the 'Analytics' tab selected. The 'Forecast' panel is open, featuring several configuration options:

- Forecast periods:** Set to 'Auto' with 'Ignored last periods' set to 0.
- Confidence level:** Set to 95%.
- Seasonal period:** Set to 'Auto'.
- Optional factors to consider:** A slot labeled 'Click or drag data here' with a count of 0/5.
- See statistical details:** A link to view statistical information.
- Insights:** A toggle switch that is off.

3. Click the **Optional factors to consider** slot and select the measures you want the forecast to consider. You can also drag measures from the data tree to this slot.

Note: You can add a maximum of five measures for consideration.

The screenshot shows the IBM Cognos Analytics interface with a line chart titled 'Margin by Month' displayed on Tab 1. The chart shows margin values from January to February of the following year. To the right of the chart, the 'Forecast' panel is open, showing the following configuration:

- Forecast periods:** Set to 'Auto' with 'Ignored last periods' set to 0.
- Confidence level:** Set to 95%.
- Seasonal period:** Set to 'Auto'.
- Optional factors to consider:** A slot containing 'Sales' and 'Profit', with a count of 2/5.
- See statistical details:** A link to view statistical information.
- Insights:** A toggle switch that is off.

The optional factors are not displayed in the forecast. Hover over the forecasted values to see the factors that were considered.

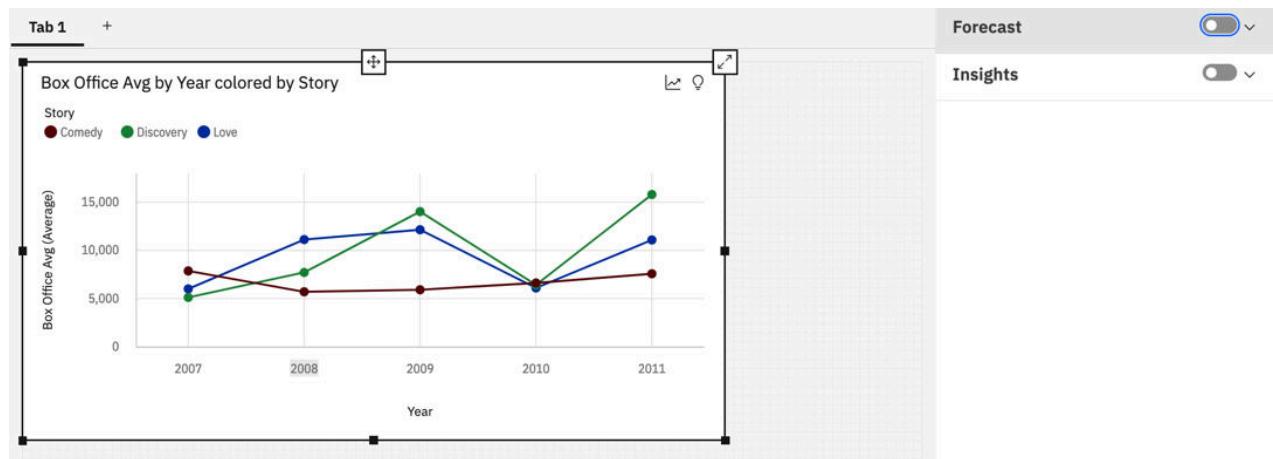
If the forecast determines that the measures you selected are independent of each other, it displays a univariate model instead. A univariate model creates a forecast for one variable without considering any other variables.

To see which forecast model was chosen for forecasting, click **See statistical details** and check the **Notes** column under **Forecasting statistical details**. You can also see which multivariate model was used – ARIMAX or Vector-Autoregression.

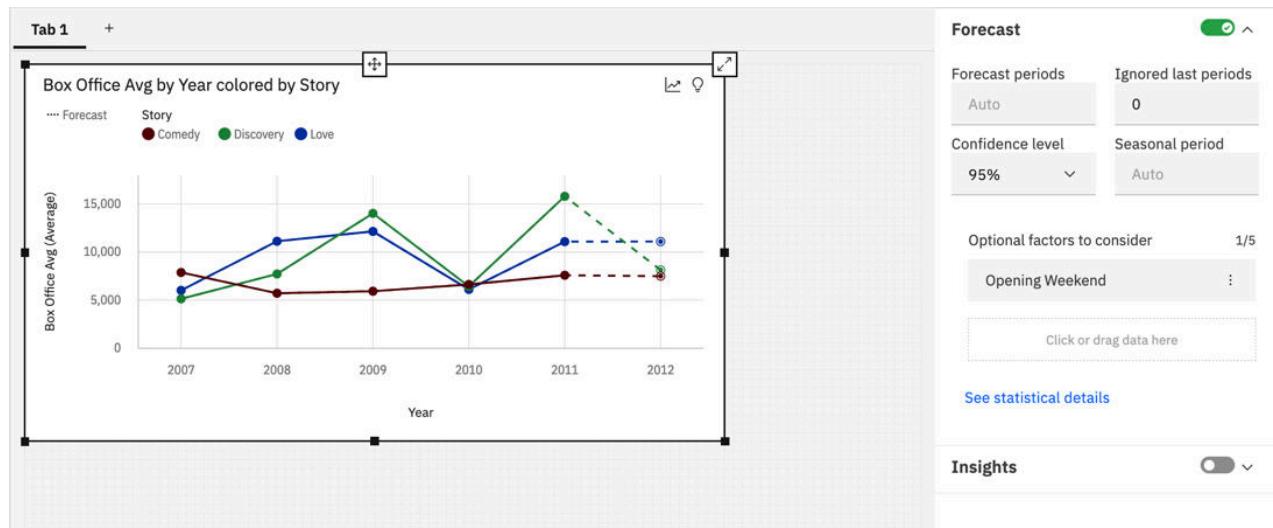
If you used the **Fields** tab to generate a forecast, you can also add a column to the **Color** slot (group by that measure). When you populate the **Color** slot in the visualization, any measure that you add to **Optional factors to consider** also applies to the **Color** slot.

Note: When you add a filtered measure on the **Color** slot, the optional factors that are taken into consideration apply only to the filtered options and not to any other options in the measure.

The following example shows Box office average by Year that is grouped by Story (in the **Color** slot). Story is also filtered to only display Comedy, Discovery, and Love.



When you add an optional factor to consider, the forecast considers Opening Weekend for only the filtered options in Story (Opening Weekend for Comedy, Opening weekend for Discovery, and Opening Weekend for Love). The optional factor is not considered for other options in the Story measure.



Principles of advanced data analytics

IBM Cognos Analytics is a business intelligence tool for managing and analyzing data. It includes self-service features for users to prepare, explore, and share data. Cognos Analytics includes predictive,

descriptive, and exploratory techniques, also known as numeric intelligence. Cognos Analytics uses many statistical tests to analyze your data.

It is important to understand the definitions of these tests as they apply to Cognos Analytics.

Numeric algorithms are used as part of the workflow to provide features to the user that communicate information about the numeric properties and relationships in their data.

Business oriented

Unlike traditional statistical software, where the target audience is an experienced data analyst, the algorithms of Cognos Analytics are aimed at users who are familiar with, but not an expert in data analysis. This means that when Cognos Analytics considers tradeoffs, usefulness is chosen over complexity.

Trustworthy

Business data is lot more complicated than text-book examples that are used in statistical courses or in web searches and examples. Cognos Analytics uses algorithms that are robust and that are able to cope with a range of varieties of unusual data. Cognos Analytics does this because although the algorithms that are more brittle are able to get slightly better results than robust algorithms, they require you to make sure that they are applicable and build correct data transformations for the results to be meaningful. A minor drop in accuracy is worth the safety that is provided by an algorithm, which does not give wrong results when the data is not as it is supposed to be.

Intelligent

Almost all algorithms require decisions to be made about them; levels of confidence, which combinations of fields to explore, data transformations. The details of these decisions can be found in the descriptions.

Cognos Analytics chooses appropriate values automatically, by examining properties of the data. As a user you might not discover all the decisions that are made.

Summary

In Cognos Analytics, the numeric algorithms and procedures are designed to produce trustworthy results automatically. To get the best possible prediction, classification or analysis, a professional statistician analyzes the data by using IBM SPSS Statistics or IBM SPSS Modeler. The goal of Cognos Analytics is to provide qualitative insights that help you to understand your data and its relationships, and to do so automatically for a wide variety of types of data. Cognos Analytics aims at providing results similar to a professional statistician without getting in the way of the business user.

Data preparation

Data preparation is a pre-analysis step that is used by most data analytic algorithms to ensure that the data is suitable for analytic use.

Overview

Data preparation is critical in IBM Cognos Analytics. Only prepared data is entered into analysis for key drivers, decision trees, and relationships that are displayed in the advanced analytics visualizations: Spiral, Driver analysis, Decision tree, Sunburst, and Explore relationships. Data is not automatically prepared for other visualizations and their corresponding insights.

Algorithms

All applied algorithms are based on values of a single field at a time. Missing values are removed or handled for each field, all numeric predictor driver fields are binned. All categorical fields are adjusted for large number of categories and outliers are handled in the target field. While all data preparation

influences the analysis results, corresponding data preparation summaries are not currently reported to you.

Details

Data preparation and subsequent key drivers, decision trees and relationships are based on a data sample with approximately 10,000 rows when the original data is larger. Bernoulli random sampling, equal probability without replacement random sampling, is applied to uploaded data and any connected data sources that are supporting random sampling. Otherwise, systematic sampling is used.

Data preparation for numeric fields

A field is treated as numeric whenever it contains numeric information and its usage property is set to measure.

Overview

Because numeric data can be varied in their distribution, IBM Cognos Analytics transforms non-target numeric fields into ordinal bins, reducing the dependence of analytic algorithms on the format of numeric data.

Algorithms

The basic algorithm that is used is equal frequency binning. Numeric data is divided into a fixed number of bins that are attempting to put an equal number of rows of data into each bin. Missing values are placed in their own bin. Cognos Analytics attempts to use knowledge about missing values in predictor fields to build a better model. For example, if a field of data represents when an item was tested, Cognos Analytics uses missing values (which might represent that an item was never tested) to help predict the values of other fields.

Details

Certain field exclusion criteria apply to numeric fields. A numeric field is excluded from further analysis if it has only a single value, including the missing value. Otherwise, the numeric field is binned and the default number of bins is 5. If a field has no more than 10 unique numeric values, then binning is not attempted, and each unique value is given its own category. If zero occurs in more than 40% of rows, it is always given a separate category. Missing values are placed in their own bin and do not affect the binning procedure.

Data preparation for categorical fields

A field is treated as categorical whenever its usage property is set to attribute or identifier.

Overview

The main information that is extracted from categorical fields is observed frequency for each unique category value. Appropriate analytic methods are applied to categorical fields, but their accuracy and performance can be adversely affected when the number of different categories becomes large. The main data preparation step is to start merging categories when their number becomes large.

Algorithms

The basic algorithm that is used is merging categories. Categories are sorted by their frequency in descending order and the categories beyond default number are merged in a single category. Missing values are treated as a single separate category. In other words, IBM Cognos Analytics uses missing values in a similar way as for the numeric fields. Categorical fields are treated as nominal. Intrinsic order is not assumed among categories.

Details

Certain field exclusion criteria apply to categorical fields. A categorical field is excluded from further analysis if it has only a single value or the number of unique, non-merged categories exceeds 50% of the number of valid data rows.

Otherwise, the categorical field is merged and the default number of non-merged categories is 49. The rest of the categories are merged into a single extra category. All categories with row count smaller than 3 also get merged. A categorical field is also excluded if the percentage of valid data rows corresponding to the merged category exceeds 25%.

Missing values are treated as a separate category and considered in the merging step as such.

Data preparation for target fields

Specification of the target field is required for key drivers and decision tree visualizations.

Overview

Always specify the target field and at least one extra field. Models are trained by using supplied target values and are used to detect predictive relationships and eventually to predict target values given the input field values. Data preparation for the target field differs from the data preparation for the rest of the fields. Missing values in the target are not used for building models, but the rest of the information is preserved and sometimes adjusted to obtain unbiased models.

Algorithms

The main data preparation step related to target fields is removal of all data rows with missing target value. This happens before any other data preparation steps. While it ensures that only reliable information is used for model building, the number of removed rows can be substantial. The resulting model might have a limited scope in such instances. Numeric target fields are not binned, but the extreme outliers are handled to not adversely affect the later created models. Categorical target fields are treated much like other categorical fields. The only difference is that missing values have been removed for the categorical targets.

Details

Extreme outliers are detected based on lower and upper boundaries. The upper boundary is constructed by using an upper percentile such that only 2.5% percent of target values are found to have a greater value. The difference between the upper percentile and the median is multiplied by 2.5 and added to the median to obtain the upper boundary. Similar steps are applied to obtain the lower boundary. The target values that are found beyond the computed boundaries are replaced by the corresponding boundary value in all subsequent analysis.

One-way key drivers

One-way drivers are a model-based exploratory tool.

Overview

Given a target field, the tool uses a statistical model to analyze any other available data field and estimates its strength in predicting the target values. Such data fields are called target predictors or drivers. Each potentially relevant data field is analyzed and only the top drivers regarding their predictive strength are displayed. You obtain insights regarding available drivers and their ranking according to their predictive strength for the specified target in the data. One-way driver analysis results are available both in the driver analysis and spiral visualizations. Visual drill-down into each separate driver is enabled for driver analysis visualization in Explore only.

Algorithms

Analysis for each one-way driver is based on a statistical model that includes the target and a single categorical predictor. The model is applied after the data preparation step for the target field and all potential predictor fields. For example, all numeric predictor fields are binned during the data preparation step and treated as categorical in the analysis. One-way ANOVA is applied for numeric targets and Chi-square test of independence is applied for categorical targets with the chi-square adjustment for sparse data.

For each field in the list of potential drivers, a hypothesis test on whether the field has a significant impact on the target is performed. Only those fields which pass the test and have sufficiently high predictive strength are selected as possible one way key drivers.

Details

Preliminary analysis based on smarts capabilities reduces the number of potential drivers in some cases. The goal is to remove irrelevant or redundant fields. The list of used drivers is available in the UI and you can add any initially excluded drivers to the analysis. The top 20 resulting drivers with predictive strength higher than 10% are available for display.

Some restrictions are enforced on the size of the data to improve performance and speed. If the data contains more than 250 fields, the least relevant fields are excluded before driver analysis. You can add the excluded fields back into the analysis through the UI as described above. If specified data contains more than 10,000 rows, it might be sampled down to approximately 10,000 rows for purpose of driver analysis. A warning is displayed in such instances: *To improve performance, due to the number of rows in the data source, the analysis is based on a representative sample of the entire data.* The results are expected to closely approximate results that would be obtained by using all the rows in the original data.

Two-way key drivers

Two-way drivers rely on modeling and ranking pairs of categorical predictors at one time.

Overview

Given a target field, IBM Cognos Analytics uses a statistical model for analysis of a pair of other data fields and estimates its strength in predicting the target values. Search over different predictor pairs is usually not exhaustive and also some high-ranking pairs can be filtered out from the final results. The goal is to provide an overview and variety of predictor pairs that improve upon predictive strength of a single predictor models that are displayed as one-way drivers. Therefore, the insights obtained from one-way drivers are expanded and the user obtains relevant information on the pairs of fields in the data. Both one way driver and two-way driver analysis results are available in the driver analysis and spiral charts. They can be viewed separately by selecting a corresponding chart viewing option. Each displayed one-way or two-way driver can be expanded into a new visualization directly from the Driver analysis visualization in Explore.

Algorithms

Analysis for each two-way driver is based on a statistical model that includes the target and a pair of categorical predictors. The model is applied after data preparation and building all the one-way drivers. The first predictor in the pair is selected from the top 50 one-way drivers and the second is selected from the top 25 one-way drivers. This search strategy ensures that most of the top-ranking predictor pairs would be considered for modeling. The two-way ANOVA (analysis of variance) analysis is applied for numeric targets and Chi-square test of independence is applied for categorical targets with the chi-square adjustment for sparse data.

For each considered pair of fields, a hypothesis test on whether the pair has a significant impact on the target is performed. Only those pairs which pass the test and have sufficiently high predictive strength are selected as possible two-way drivers.

Details

The restriction of selection of data fields and data rows for one-way drivers apply to the two-way drivers as well. This is expected as potential predictor fields for two-way drivers are selected from the top one-way drivers based on their respective predictive strength. However, the model significance of one-way driver and the minimum predictive strength is not required for their entry into a two-way model. A resulting two-way driver must have its predictive strength higher than 10% and provide more than 10% relative improvement over the predictive strength for each of the contained one-way drivers. Relative improvement is computed as the percentage of the difference between 100% and predictive strength of the nested one-way driver. Resulting two-way drivers that satisfy these criteria are ranked by their predictive strength and the top 20 are made available for display.

Decision tree

Decision trees are more complex models than the one-way and two-way drivers. They extend the sequence as the combination models. The main difference is that decision trees support discovery of interaction among multiple predictors and therefore deeper insights than the drivers.

Overview

Given the target field, the algorithm searches across all other data fields and adds them to the model to improve its strength in predicting the target values. The search across different predictors is iterative; after the search adds one predictor, the search continues to add the next predictor that improves the model the most. The goal is to find the best set of predictors and an optimal way of combining them so that an optimal model is computed. The insights that are obtained from decision trees are presented in the form of decision rules where combination of predictors and corresponding values provide a single prediction for the target value. Decision rules are ranked by strength so that you can easily find the rules that are the most relevant and interesting. Decision rules that are generated by the decision tree are mutually exclusive. The decision rules also provide a complete rule set such that a corresponding rule exists for any combination of the predictor values in the data. Also, available is the overall decision tree predictive strength that provides relative improvement over the basic model. The results are available through three different visualizations: sunburst, tree, and decision rules. They each have certain advantages by displaying the decision tree structure and the corresponding decision rules content. Overall decision tree predictive strength is also available in the driver analysis visualization.

Algorithms

The decision tree model is computed after data preparation and building all the one-way drivers. The first tree predictor is selected as the top one-way driver. Categories of the predictor are merged when the adverse impact on the predictive strength is smaller than a certain threshold. The next step is to find the best predictor to split each tree node that consists of the merged categories. The process is continued until a stopping rule applies to a tree node. Possible options for stopping are that all categories for every candidate predictor are merged into a single node or that the number of nodes exceeds maximum number of nodes. Categories with fewer than a minimum number of rows are always merged with another category. This means that none of the nodes in the tree can contain fewer than the minimum number of rows. The same procedure is used for continuous and categorical targets, only the impurity function is different.

Details

Impurity functions

Impurity function values are used as the main criterion for splitting and merging potential tree nodes. Impurity function total for continuous trees is the sum of squares per node, while Gini impurity measure is used for the categorical targets. Gini impurity total is computed as a sum of squares of count proportions across all target categories per node that is subtracted from one and the results that are multiplied by the number of rows. Improvement in impurity function value is information gain.

When splitting each node IBM Cognos Analytics looks for a predictor field with a largest information gain computed as total impurity across all potential children nodes subtracted from the parent node impurity. Before Cognos Analytics selects the predictor, Cognos Analytics attempts to merge some of the potential children nodes that initially correspond to each predictor category. Information loss is computed by subtracting impurity of non-merged nodes from the impurity of merged nodes. As long as information loss is smaller than a threshold, the nodes are merged. This process helps to create relatively small trees that are easy to visualize and comprehend while still preserving the overall strength of the tree.

Stopping rules

Candidate nodes are always merged if they are based on fewer than 25 rows. If all categories of a predictor are merged, it cannot be used for splitting a certain node. When none of the predictors can split the specific node, the process stops for the node. The overall process of generating the tree stops when none of the nodes can be split or when the number of generated nodes exceeds 36.

Variable importance

Variable importance corresponds to a relative tree error reduction when the corresponding predictor is included in the tree. It is computed by comparing the errors of an initial tree and a restricted tree that is generated by the rest of the predictors in the initial tree. The error of the initial tree is subtracted from the error of the restricted tree and the result is divided by the error of the restricted tree. Variables with zero or negative importance are removed from the tree. The tree error is computed as the sum of squares for continuous targets and as classification error for categorical targets.

Predictive Strength

Predictive strength for tree with continuous target is computed similarly to key drivers. The contents of leaf nodes are considered. Variance contribution for each leaf node is added and divided by the overall variance for the data. This is relative error for the tree. It is subtracted from one to obtain predictive strength that is compatible with the R-squared measure that is used for key drivers.

For categorical targets, Cognos Analytics computes classification accuracy based on the classification error that is added from all the leaf nodes. Relative classification accuracy improvement over the basic model, also known as adjusted count R-square, is reported as the tree predictive strength. It is computed by subtracting the tree error from the basic model error and dividing the result by the basic model error. For example, the classification accuracy of the model can be as high as 95%, but if the majority class appears for 90% of the rows in the data, then the predictive strength of the tree is reported as 50% only. This is parallel to the continuous target case where the basic model is represented by the overall mean value. Predictive strength that is measured by R-squared is based on the tree relative improvement in reducing the overall variance.

Cognos Analytics displays only the trees that have predictive strength larger than 10%. A tree for continuous target is displayed in a driver analysis or spiral visualization if its predictive strength is higher than the predictive strength of the strongest key driver. Otherwise, it is not displayed in these charts since the key drivers provide all the relevant insights already.

Predictive strength for a decision tree is computed that uses the same data that is used for generating the decision tree. This is known to introduce bias and provide optimistic estimates of the decision tree performance on a similar data from the same data source. Cognos Analytics reduced the discrepancy by tuning the algorithm so that overfitting the training data is minimized.

Insights in visualizations

Insights in visualizations provide analytic insights that can help users to detect and validate any important relationships and meaningful differences based on the data that is presented by the visualization.

Overview

Insights are controlled by and summarized in the **Insights** box available in every eligible visualization. When you turn on insights, the summary appears in the **Insights** box and related visualization elements

are highlighted. Details are provided in the corresponding tooltip message. You can control each available insight separately.

Algorithms

The type of insights depends on the displayed data by the visualization. Available types of insights are **Average**, **Predictive strength**, **Meaningful Differences**, **Fit line**, and **Most Frequent**. Average provides the mean of the displayed summaries, and most frequent the category or category that appears most often in the data. The rest of the insights depend on more advanced analytics and statistical tests. The goal is to provide reliable information that you can use for an enhanced description of the viewed data and discovery of any relationships that are expected to be found in the population that is represented by this data.

Details

Insights analysis is always based on the same data rows that are used to create the summaries displayed in the visualization. This means that full data is used for insights unless any filtering is applied to the original data.

Some statistical tests and analytics that are used in insights require not only the data summaries that are displayed in the visualization, but also some additional summarizations. For example, test of meaningful differences across multiple categories of an explanatory field requires counts and variances for each category in addition to the displayed data. These additional summaries are obtained from a database together with the summaries that are needed for the visualization. All summaries are processed by the insights but only the required summaries are available in the visualization. Insights analysis is always based on the same data rows that are used to create the summaries displayed in the visualization.

Restrictions

If insights are not immediately available in a visualization, one of the following reasons might apply:

- The visualization type itself does not support insights.
- The data in the visualization may have been clipped.
- The combination of summarization level, field type, and field role of a selected field does not match the requirements for any of the available insights.

Supported visualization types for insights

The following visualization types support insights:

- Area
- Bar
- Bubble
- Column
- Heat map
- Hierarchy bubble
- Line
- Line and column
- Map
- Packed bubble
- Pie
- Point
- Radial
- Scatter
- Stacked bar

- Stacked column
- Tree map
- Word cloud

Small multiple extensions are supported for some insights including the Most Frequent and Meaningful Differences.

Summarization levels

Supported summarization levels are **Count**, **Average**, **Sum**, **Minimum**, and **Maximum**. Any other values such as **Count distinct** might prevent the insights from being suggested. Certain algorithms support only specific summarization levels. Changing the default summarization level to one of the supported values might potentially help with enabling insights.

Field types

Field types can be internally designated as continuous or categorical depending upon the values of the selected field.

| Field type | Description |
|-------------|---|
| Categorical | A variable that can take on one of a limited, and usually fixed, number of possible values. A categorical variable assigns each individual or other unit of observation to a particular group or nominal category based on some qualitative property. For example, the country a person lives in. |
| Continuous | A variable that is used to describe numeric values, such as a range of 0-100 or 0.75 - 1.25. A continuous value can be an integer, real number, or date and time. |

Field roles

IBM Cognos Analytics assigns a role to each of the field slots in a supported visualization. A field role might be designated as one of the following depending on the slot of the visualization.

| Field role | Description |
|-------------|---|
| Response | A variable that is predicted and can also be referred to as the target or dependent variable. It is commonly on the Y-axis. |
| Explanatory | A variable which helps to explain changes in the response and is also referred to as the predictor or independent variable. It is commonly on the X-axis. |
| Group | A variable that is treated as explanatory or an optional grouped factor which helps to determine the number of models built in the algorithm. For example, this can correspond to the Color slot of a Column visualization. |
| Weight | A variable which defines the optional regression weights, which are used to calculate the regression model. For example, this can correspond to the Size slot of a Bubble visualization. |
| Repeat | A variable which creates small multiples, with the visualization repeated once for each distinct value of the variable. For example, this can correspond to the Repeat (rows) slot of a pie visualization. |
| Points | A variable which defines the shaping of the data and data points used to calculate the model. For example, this can correspond to the Points slot of a Scatter visualization. |

As a general example, in a bar visualization with the following slots, the role mappings in this visualization are defined as:

- Bars (y-axis), explanatory
- Length (x-axis), response
- Color, group

Insights in visualizations for counts

Insights for counts are available whenever count is displayed for each category of a single categorical field.

They are also available when count is displayed for each combination of categories of a pair of categorical fields in the visualization. In the latter case the pair may be two explanatory fields, as in the rows and columns of a heat map, or one explanatory and one repeat field, as in the bars and repeat (column) of a bar chart.

Insights for counts of combined categories of three categorical fields are supported for one explanatory and the combination of two repeat fields, as in the segments, repeat (column), and repeat (row) of a pie visualization.

Overview

Use such visualizations when you are interested in comparing the number of items in different categories, or combination of categories.

Algorithms

IBM Cognos Analytics reports the average count across all categories of the specified response field and applies statistical tests to detect categories where the counts are statistically most different from the average.

Visualizations with two or three categorical fields and counts for each combination of categories are treated differently. Cognos Analytics does not only compare the counts across categories but detects any relationship between the categorical fields. Cognos Analytics treats one field as the response field and the others as the explanatory field.

Cognos Analytics reports the most frequent category in visualizations with one categorical explanatory field, one or two categorical repeat fields, and a count response field.

Details

Single categorical field

The first test that is applied is the chi-square test of equal frequencies to establish whether any counts are available that are significantly different from the average. If the test result is significant, Cognos Analytics applies the influence chi-square test for each category separately. Cognos Analytics computes the effect size for categories where the influence test is statistically significant and reports the categories with the largest effect size under the meaningful differences.

Restrictions

The following list describes the conditions that determine whether insights are suggested for this algorithm.

Response

Exactly 1

Summarization level = Count

Explanatory

N/A

Group

N/A

Weight

N/A

Points

N/A

Insight

Average

Meaningful differences

Two categorical fields

Cognos Analytics treats one categorical field as the response field and the other as the explanatory field. The original count field is used as input to the algorithms.

Chi-square test of independence with the adjustment for sparse data is used to establish whether a relationship exists between the response field and the explanatory field. If the test result is significant, Cognos Analytics computes the predictive strength for this model as adjusted count R-squared, with low-frequency categories filtered. The relationship is declared reliable and the predictive strength is reported if it is greater than 10%.

If the test result above is significant, all combinations of explanatory and response categories are analyzed further by applying the influence chi-square test for each combination. Combinations of explanatory and response categories where the influence test is significant are considered influential. Effect size is computed for each influential combination of categories and the combinations with the largest effect size are reported under meaningful differences.

If the roles of the two categorical fields are explanatory and repeat, the most frequent algorithm is applied. The counts are summed over each distinct category of the explanatory field. The largest sum is reported, together with the number of categories having that sum. Note that the repeat field is not used by this algorithm, but only triggers when the algorithm is applied.

Restrictions

The following lists describe the conditions that determine whether insights are suggested for this algorithm.

Response

Exactly 1

Summarization level = Count

Exactly 1

Summarization level = Count

Explanatory

Exactly 2

Categorical

Exactly 1

Categorical

Group

N/A

N/A

Weight

N/A

N/A

Points

N/A

N/A

Repeat

N/A

Exactly 1

Categorical

Insight

- Predictive strength
- Meaningful differences
- Predictive strength
- Meaningful differences
- Most frequent

Three categorical fields

These algorithms are applied only when there is one explanatory field and two repeat fields. The combination of the two repeat fields is treated as if it were a single categorical field, where the categories are the pairs of categories from the two repeat fields.

The predictive strength is calculated exactly as in the two categorical fields case, using the paired repeat fields as the predictor of the explanatory field. The chi-square test of independence with the adjustment for sparse data is used to test significance of the relationship, and the adjusted count R-squared with low-frequency categories filtered is used to find the predictive strength.

The meaningful differences are calculated exactly as in the two categorical fields case, identifying combinations of the explanatory field and the paired repeat fields for which the count is unusual. The influence chi-square test is used to test significance for each combination, and the combinations with the largest effect size are reported.

The most frequent algorithm is applied exactly as in the two categorical fields case, summing the counts over each distinct category of the explanatory field. The largest sum is reported, together with the number of categories having that sum. Note that the repeat fields are not used by this algorithm, but only triggers when the algorithm is applied.

Response

- Exactly 1
- Summarization level = Count

Explanatory

- Exactly 1
- Categorical

Group

- N/A

Weight

- N/A

Points

- N/A

Repeat

- Exactly 2
- Categorical

Insight

- Predictive strength
- Meaningful differences
- Most frequent

Insights in visualizations for summaries by one or more explanatory fields

Insights for summaries are available when the summarization level is average, sum, minimum, or maximum for a continuous response field. Insights are computed and displayed at each category of a

single categorical explanatory field, or each combination of categories of a pair of categorical explanatory fields in the visualization.

Overview

Use such visualizations when you are interested in comparing values of a response field across different categories, or across combinations of categories of explanatory fields.

Algorithms

If the summarization level is average, IBM Cognos Analytics detects any relationship between the response field and explanatory fields and computes predictive strength of the corresponding model. If differences of average values across explanatory categories are statistically significant, Cognos Analytics identifies the most different explanatory categories or combination of categories under the meaningful differences.

When the response summarization level is sum, Cognos Analytics computes the average sum across explanatory categories or combinations of categories. If the differences of sums across categories are statistically significant, Cognos Analytics identifies the most different explanatory categories or combinations of categories under the meaningful differences.

For all applicable charts, the average insight displays the mean summarized response value across all explanatory categories. When the summarization level for the response is average, the weighted mean is computed using the displayed value and the count for each explanatory category.

Details

Average by single explanatory field

When the summarization level for the response field is average and a single categorical explanatory field is available, Cognos Analytics applies one-way ANOVA analysis. Cognos Analytics uses F statistic to test whether average values across explanatory categories are equal. If any differences are significant, Cognos Analytics computes the adjusted R-squared as predictive strength of the relationship between the response field and the explanatory field. Reliable relationship and its predictive strength are reported to the user if the predictive strength exceeds 10%.

If the difference among averages is significant, Cognos Analytics conducts an influence t test to detect the categories that are the most different from the overall mean. This involves computing standard error for each category average and comparing the average with the overall mean by using the t test statistic. For categories with significant differences, Cognos Analytics also computes the corresponding effect size and reports the categories with the largest effect size under meaningful differences.

Restrictions

The following list describes the conditions that determine whether insights are suggested for this algorithm.

Response

Exactly 1

Summarization level = Average

Continuous

Explanatory

Exactly 1

Categorical

Group

N/A

Weight
Optional

Any

Points
N/A

Insight

Average

Predictive strength

Meaningful differences

Average by two explanatory fields

For charts where the summarization level for the response field is average and two categorical explanatory fields are available, Cognos Analytics applies two-way ANOVA analysis. Cognos Analytics uses F statistic to test whether average values across explanatory category combinations are equal. If differences are significant, Cognos Analytics computes adjusted R-squared as predictive strength of the relationship between the response field and the two explanatory fields. Cognos Analytics also computes the adjusted R-squared for one-way models that include a single explanatory field each. If the predictive strength of a two-way model is larger than 10% and its relative predictive strength improvement over corresponding one-way models is more than 10%, Cognos Analytics displays the predictive strength of the two-way model and reports reliable relationship between the response field and the two explanatory fields. Otherwise, if the maximum predictive strength of one-way models exceeds 10%, Cognos Analytics reports reliable relationship between the response and the corresponding single explanatory field together with its predictive strength. If maximum predictive strength of one-way models does not exceed 10%, Cognos Analytics reports no relationship between the response and explanatory fields.

When the difference among averages across all category combinations is significant, Cognos Analytics also conducts an influence t test to detect the category combinations that are the most different from the overall mean. This test is similar to the test that is used for a single explanatory field. The main difference is that instead of considering categories of a single explanatory field, Cognos Analytics considers category combinations from the two explanatory fields. Category combinations with the largest effect size are reported under meaningful differences.

Restrictions

The following list describes the conditions that determine whether insights are suggested for this algorithm.

Response
Exactly 1

Summarization level = Average

Continuous

Explanatory
Exactly 2
Categorical

Group

Optional (treat as Explanatory)

Categorical

Weight
Optional

Points
N/A

Insight

- Average
- Predictive strength
- Meaningful differences

Sum by one or two explanatory fields

For charts where the summarization level for the response field is sum and one or two categorical explanatory fields are available, Cognos Analytics applies the sum comparison test. This test detects if any of the sums are different from the average sum value across all explanatory categories or combinations of categories. If this test is significant, Cognos Analytics proceeds by conducting the sum influence test that compares sum for each category or combinations of categories with the average sum. For every significant test, Cognos Analytics also computes corresponding effect size. Categories or combinations of categories with the largest effect sizes are reported under meaningful differences.

Restrictions

The following list describes the conditions that determine whether insights are suggested for this algorithm.

Response

- Exactly 1
- Summarization level = Sum
- Continuous

Explanatory

- 1 or 2
- Categorical

Group

- Optional (treat as Explanatory)
- Categorical

Weight

- N/A

Points

- N/A

Insight

- Average
- Meaningful differences

Minimum or maximum by one or two explanatory fields

For summarization levels of minimum or maximum, only the average insight is available. It is computed as the average value of the response minimum or maximum across all explanatory categories or combinations of categories.

Restrictions

The following list describes the conditions that determine whether insights are suggested for this algorithm.

Response

- Exactly 1
- Summarization level = Min or Max
- Continuous

Explanatory

1 or 2

Categorical

Group

N/A

Weight

N/A

Points

N/A

Insight

Average

Insights in visualizations for two continuous fields

Insights for two continuous fields are available when a visualization involves two continuous fields and an optional categorical group or points field.

Overview

Use visualizations such as scatter plot for the two continuous fields, possibly sliced by categories of the group field. The main goal is to detect any relationship between the continuous field and include the categorical group field as well. The results contain predictive strength of discovered relationship, the relationship description provided by fit lines, and any points with large discrepancy from the fit lines as meaningful differences.

Algorithms

IBM Cognos Analytics computes multiple regression models that involve one of the continuous fields as the response, and the other continuous fields as an explanatory field. The optional categorical group field is used as a model factor. In addition to additive model contributions corresponding to the explanatory field, Cognos Analytics considers the square of the explanatory field and any interaction terms that include a factor. A regression model that provides an optimal fit for the data is selected from a number of possible models. The corresponding fit line is derived from a linear or quadratic model. In the case where an optional categorical group field has been supplied, it can produce a different line or quadratic curve for each category of the factor. A factor with up to three categories is currently considered in order not to overload the visualization.

Each point in a visualization represents a number of rows in the data and it is defined by the **Points** field. Corresponding row counts that are based on the response field define frequency weights that are used for building the regression models. Regression weights are used independently of frequency weight when Cognos Analytics computes the regression models.

Details

Two continuous fields

When Cognos Analytics applies multiple linear regression for two continuous fields, one is chosen as the response and the other as an explanatory field in the model. Cognos Analytics considers both linear and quadratic model terms. If the quadratic model is significant based on the F test and its relative predictive strength improvement is more than 10% over the linear model, Cognos Analytics reports its predictive strength and displays the quadratic curve based on the computed model. This curve displays predicted values of the response based on the corresponding values of the explanatory field. Otherwise, linear predictor model is considered. If it is significant and its predictive strength is larger than 10%, Cognos Analytics reports its predictive strength and displays a line representing the predicted values of the response field based on the corresponding explanatory values. If the linear

model does not qualify, the mean is reported as the fit line and no relationship is reported between the two continuous fields.

When linear or quadratic relationship is detected, Cognos Analytics also inspects the differences between predicted and observed values of the response field. These differences are called residuals and Cognos Analytics conducts studentized residuals test to detect outliers. Points with large departure from the discovered relationships are displayed under meaningful differences in the corresponding chart.

Restrictions

The following list describes the conditions that determine whether insights are suggested for this algorithm.

Response

Exactly 1

Summarization level = any

Continuous

Explanatory

Exactly 1

Continuous

Group

N/A

Weight

Optional

Continuous

Points

Optional

Any

Insight

Predictive strength

Fit line

Meaningful differences

Categorical group field

When a categorical group field is specified in addition to two continuous fields, it is used as a factor in the multiple linear regression where one of the two continuous fields is chosen as the response field and the other as an explanatory field. Cognos Analytics considers linear and quadratic model terms for continuous explanatory combined with contributions from the factor. If the quadratic model or linear model that include the factor is significant based on the F test and its relative predictive strength improvement is more than 10% over the linear model with continuous explanatory only, Cognos Analytics generates four extra models. These models include all possible interactions of continuous explanatory and factor. A model with the maximum adjusted R-squared that is also significant is selected as the final model. It is used to create a fit line for each category of the categorical predictor. Otherwise, the linear model with continuous explanatory is tested for significance and reported if its predictive strength is greater than 10%. If the linear model does not qualify, no reliable relationship among fields is established and the overall mean is reported as the fit line.

When a reliable relationship is detected, Cognos Analytics also checks for difference between the predicted and observed values of the response field. Cognos Analytics conducts studentized residuals test to detect outliers and display them under meaningful differences in the corresponding chart.

Restrictions

The following list describes the conditions that determine whether insights are suggested for this algorithm.

Response

Exactly 1

Summarization level = any

Continuous

Explanatory

Exactly 1

Continuous

Group

Exactly 1

Categorical

Weight

Optional

Any

Points

Optional

Any

Insight

Predictive strength

Fit line

Meaningful differences

Regression weights field

An optional continuous field can be used to specify regression weights for the model. Regression weight for an available value corresponds to influence of the observation on the computed model parameters.

Relationships

Relationships visualizations in an exploration are displayed initially when you specify data for exploration.

Overview

IBM Cognos Analytics provides a quick overview of relationships among pairs of fields that focus on a single field of interest. Visualization comprises multiple tabs, each for a different field of interest. This information is very useful in orienting you regarding a multitude of relevant relationships available in data to be explored further as needed.

Algorithms

While the initial field of interest is determined based on semantic data analysis, you can specify a different field of interest. Each tab provides a network graph with fields as nodes and links between pairs of nodes that represents the relative strength of the relationship between nodes. While links from the field of interest dominate the graph, other related pairs of fields with strong relationships are displayed as well. You can adjust a slider to view larger or smaller number of nodes in the network.

Details

Data for analysis

Relationships use non-summarized data to compute strength of relationship among all pairs of fields considered. To standardize the measure of relationship strength and make it comparable across all pairs of fields, all numeric fields are binned as the first step. All fields in the data are treated as categorical. The binning that is applied is equal frequency binning generating five bins. More details are available in the section on data preparation for numeric fields.

Relationship strength

Data for each pair of categorical fields is first tabulated for all combination of field categories that are found in the data. Based on the tabulated data, IBM Cognos Analytics applies the chi-square test of independence to assess whether the fields are independent. If the independence departure is significant, Cognos Analytics computes the effect size based on the chi-square statistic. This is Cramer's V that is widely used as a measure of association between two categorical fields. The values of this measure are in the range 0 - 1 and Cognos Analytics reports the relationship strength value that is expressed as a percentage. The relationships with strength less than 10% are not reported as they are considered too weak to be of practical value.

Performance limitations

Computing relationship strength between all pairs of fields in the data set is prohibitive for large data. Cognos Analytics limits the number of processed fields to 100 to be able to provide a quick answer. However, these fields are selected by another process and the possible loss of relevant relationships is minimized. If the data contain more than 10,000 rows, Cognos Analytics obtains a random sample of this size for performance reasons. This data size ensures minimal loss in accuracy of the relationship strength estimate.

Statistical tests

IBM Cognos Analytics uses many statistical tests to analyze your data. It is important to understand the definitions of these tests as they apply to Cognos Analytics.

Note: These statistical tests are fixed system operations and cannot be modified.

Analysis of variance (ANOVA)

Analysis of variance, or ANOVA, is a linear modeling method for evaluating the relationship among fields. For key drivers and for insights that are related to multiple charts, ANOVA tests whether the mean target value varies across categories of one input or combinations of categories of two inputs.

Note: This statistical test is a fixed system operation and cannot be modified.

To test if the means are different, an ANOVA test compares the explained variance (caused by the input fields) to the unexplained variance (caused by the error source). If the ratio of explained variance to unexplained variance is high, the means are statistically different.

IBM Cognos Analytics can calculate one-way ANOVA tests (with one input) and two-way ANOVA tests (with two inputs). If an input is continuous, the input is binned to create groups whose target means can be compared with the ANOVA test. A one-way ANOVA test is an extension of the t test, but an ANOVA test can compare any number of means. The t test can compare only two means.

Although an ANOVA test reveals a statistical difference between means, it does not indicate which means are different. IBM Cognos Analytics visualization insights feature reports groups that are causing the means to be different as meaningful differences.

One-way ANOVA

The one-way ANOVA test uses an F value. The following procedure describes how the F value is calculated:

1. Calculate the overall mean for the continuous field.

2. Calculate the mean square for the categorical field (the explained variance).
 - a. Calculate the sum of squares for the categorical field.
 - i) For each category, subtract the overall mean from the category's mean.
 - ii) Take the square of each of these results and add them together.
 - b. Divide the sum of squares for the categorical field by the appropriate degrees of freedom.
3. Calculate the mean square for the error source (the unexplained variance).
 - a. Calculate the sum of squares for the error source.
 - i) Within each category, subtract the category's mean from each record value.
 - ii) Take the square of each difference and add them together.
 - b. Divide the sum of square for the error source by the appropriate degrees of freedom.
4. Divide the mean square for the categorical field by the mean square for the error source. In other words, calculate the ratio of explained variance to unexplained variance. This ratio is the F value.

The F value is compared to a theoretical F distribution to determine the probability of obtaining the F value by chance.

- This probability is the significance value.
- If the significance value is less than the significance level, the means are significantly different.

Adjusted R² is used to estimate model predictive strength. Significance level is set to 5% and the model predictive strength must be greater than 10% to indicate reliable predictive relationship between the target and the input field.

Predictive strength is reported for one-way key drivers and an insight for charts that display an average of numeric measure across categories of a categorical field.

Two-way ANOVA

Like the one-way ANOVA, the two-way ANOVA test calculates an F value. It is used to test whether means in the full two-way model are significantly different. The procedure is similar to the one-way ANOVA, except that two categorical fields are used as inputs instead of a single categorical field. Means and sum of squares statistics are computed for each combination of categories from the categorical fields.

Adjusted R² is also used to estimate model predictive strength. Significance level is set to 5% and the model predictive strength must be greater than 10% for model to be considered. The two-way model must also have at least 10% improvement over the predictive strengths of the nested one-way models to indicate reliable predictive relationship between the target and two input fields. Relative improvement is computed as the percentage of the difference between 100% and predictive strength of the nested one-way model.

Predictive strength is reported for two-way key drivers and an insight for charts that display an average of numeric measure across categories of two categorical fields.

Classification tree

A classification tree is a type of decision tree. It uses Gini impurity measure to classify records in the target field's categories. The predictions are based on combinations of values in the input fields.

Note: This statistical test is a fixed system operation and cannot be modified.

A classification tree calculates the predicted target category for each node in the tree. This type of tree is generated when the target field is categorical.

The algorithmic details are too complicated to describe here. You can see the frequency statistics in the tooltips for the nodes in the decision tree visualization. Each node is split into two or more child nodes to reduce the Gini impurity value for the node. Gini impurity is a function that penalizes the more even distributions of target values and is based on the target frequency statistics and the number of data rows corresponding to the node. Child nodes corresponding to given predictor categories are merged when the

corresponding increase in Gini impurity is tolerable within specified limit. For each node, the predictor that reduces the Gini impurity value the most is selected for splitting the node.

The process of building a decision tree starts with the root node that corresponds to all the rows in the data. Any node is split into child nodes until no further improvement in Gini impurity is possible, or the number of data rows corresponding to the node becomes too small. The process also stops if the number of nodes in the decision tree becomes too large.

The predictive strength that is reported for classification tree is the adjusted count R^2 . It is obtained by computing the tree classification accuracy improvement over the constant model and dividing it by the constant model classification error. A constant model always predicts the target mode and its classification accuracy is estimated by the mode frequency. A reliable predictive classification tree is reported when its predictive strength is greater than a default threshold of 10%.

Regression tree

A regression tree is a type of decision tree. It uses sum of squares and regression analysis to predict values of the target field. The predictions are based on combinations of values in the input fields.

Note: This statistical test is a fixed system operation and cannot be modified.

A regression tree calculates a predicted mean value for each node in the tree. This type of tree is generated when the target field is continuous.

The algorithmic details are too complicated to describe here. You can see some of the statistics in the tooltips for the nodes in the decision tree visualization. Each node is split into two or more child nodes to reduce the sum of squares for the node. Sum of squares is a function that penalizes target values distant from the mean. Both mean and standard deviation are displayed for each node. Sum of squares is directly related to the standard deviation and the number of data rows corresponding to the node. Child nodes corresponding to given predictor categories are merged when the increase in sum of squares is tolerable within specified limit. For each node, the predictor that reduces the sum of squares the most is selected for splitting the node.

The process of building a decision tree starts with the root node that corresponds to all the rows in the data. Any node is split into child nodes until no further improvement in the sum of squares is possible, or the number of rows corresponding to the node becomes too small. The process also stops if the number of nodes in the decision tree becomes too large.

R^2 is used to estimate regression tree predictive strength. A reliable predictive regression tree is reported when its predictive strength is greater than the 10% threshold.

Chi-square test of equal frequencies

The chi-square test of equal frequencies checks whether the frequencies (number of values) in each category or group are statistically different from each other.

Note: This statistical test is a fixed system operation and cannot be modified.

The following procedure describes how the chi-square value is calculated:

1. Determine the expected frequency. Because the frequency is expected to be the same for each category (equal frequencies), it is the average frequency or count. The average frequency is N/R , where N is the total frequency and R is the number of categories.
2. For each category, subtract the expected frequency from the actual (observed) frequency.
3. Take the square of each of these results and divide each square by the expected frequency.
4. Add up all the results.

The chi-square value is compared to a theoretical chi-square distribution to determine the probability of obtaining the value by chance.

- This probability is the significance value.
- If the significance value is less than the significance level, the frequencies are significantly different.

- For sparse tables, IBM Cognos Analytics adjusts the chi-square test to reduce the contribution of cells with a small expected value, which would otherwise have a disproportionately large contribution to the statistic.

The effect size for this test is the strength of the unequal frequencies.

Chi-square test of independence

The chi-square test of independence determines whether two categorical fields are independent. If the fields are not independent, they are associated.

Note: This statistical test is a fixed system operation and cannot be modified.

The following procedure describes how the chi-square value is calculated:

1. Determine the expected frequency with the assumption that the fields are independent. The expected frequency for each combination of categories is the joint probability for the two fields that are multiplied by the total count. The joint probability of two independent fields is the product of the two probabilities for each combination of categories.

For example, consider two fields, gender and favorite color. The total count is 100, with 40 males, and 20 people whose favorite color is gray. Assuming that gender and color preference are independent, the expected frequency of males whose favorite color is gray is $(40/100)*(20/100)*100$, which calculates to 8.

2. For each combination, subtract the expected frequency from the actual (observed) frequency.
3. Take the square of each of these results and divide each square by the expected frequency.
4. Add up all the results.

The chi-square value is compared to a theoretical chi-square distribution to determine the probability of obtaining the value by chance.

- This probability is the significance value.
- If the significance value is less than the significance level, the frequencies are significantly different.
- For sparse tables, IBM Cognos Analytics adjusts the chi-square test to reduce the contribution of cells with a small expected value, which would otherwise have a disproportionately large contribution to the statistic.

The effect size for this test is Cramér's V.

Influence test

The influence test is a chi-square test that tests whether the number of records in a group is significantly different from the expected frequency. The group might be a category or a combination of categories. Considering the significance value and effect size, the test identifies influential groups.

Note: This statistical test is a fixed system operation and cannot be modified.

The influence test uses the standardized Pearson residual to calculate the chi-square value. The formula for the Pearson residual depends on whether a single category or combination of two categories is considered.

For field summary and single category, the formula is $(O - N/J)^2 / (N/J) * (1 - 1/J)$. O is the observed, actual frequency. N is the total count and $1/J$ is the expected probability where J is the number of categories.

For two fields and the combination of two categories, it is $(O - E)^2 / E * (1 - N_i/N) * (1 - N_k/N)$. E is the expected frequency $E = N_i * N_k / N$ where N_i is the count of i-th category for the first field, and N_k is the count of k-th category for the second field.

The chi-square value is compared to a theoretical chi-square distribution to determine the probability of obtaining the chi-square value by chance.

- This probability is the significance value.

- If the significance value after a Bonferroni adjustment is less than the significance level, the group is judged to be influential. The Bonferroni adjustment is necessary because multiple chi-square tests are conducted, one for each group.

The top group has the greatest difference when compared to the expected frequency. The top high group is the group with frequencies that are greater than the expected frequencies. The top low group is the group with frequencies that are less than the expected frequency.

The effect size is influential target category strength. It is computed as the square root of the chi-square value divided by the total count. Meaningful differences highlight the categories with the highest effect size.

Influence t test

The influence t test compares the mean value of a measure in a group with overall mean value for the measure.

Note: This statistical test is a fixed system operation and cannot be modified.

The group might be a category or a combination of categories. Considering the significance value and effect size, the test identifies influential groups.

The influence t test uses pooled standard deviation estimate that is obtained by combining the measure variation within all the groups. Pooled standard deviation is in turn divided by the square root of the number of rows in the group to obtain the standard error of the group mean. The corresponding t-statistic is computed as the difference between the group mean and the overall mean that is divided by the group standard error.

The t-statistic value is compared to a theoretical t distribution with degrees of freedom equal to the number of rows that are reduced by the number of groups to determine the probability of obtaining the t-statistic value by chance.

- This probability is the significance value.
- If the significance value after a Bonferroni adjustment is less than the significance level, the group is judged to be influential. The Bonferroni adjustment is necessary because multiple t tests are conducted, one for each group.

The top group has the greatest difference when compared to the expected frequency. The top high group is the group with frequencies that are greater than the expected frequencies. The top low group is the group with frequencies that are less than the expected frequency.

The effect size is influential category strength. It is computed as the absolute value of the t-statistic divided by the square root of the group count. Meaningful differences highlight the categories with the highest effect size.

Multiple linear regression

The multiple linear regression model is a versatile statistical model for evaluating relationships between a continuous target and predictors.

Note: This statistical test is a fixed system operation and cannot be modified.

Predictors can be continuous, categorical, or derived fields so that nonlinear relationships are also supported. The model is linear because it consists of additive terms where each term is a predictor that is multiplied by an estimated coefficient. A constant (intercept) term is also typically added to the model.

Linear regression is used to generate insights for charts that contain at least two continuous fields with one identified as the target and the other as a predictor. In addition, a categorical predictor and two auxiliary continuous fields can be specified in a chart and used to generate an appropriate regression model. For each candidate model, IBM Cognos Analytics conducts an F test of model significance.

Model fitting and testing

The multiple linear model is fitted with the following steps:

1. Construct a design matrix that contains one row per each data row and one column per each parameter in the regression model. Columns correspond to predictors or predictor categories.
2. Compute the regression coefficients.
 - a. Multiply the transposed design matrix with itself.
 - b. Multiply the transposed design matrix with the vector of target values.
 - c. Multiply the inverse of the matrix from step a with the matrix from step b.

Using the obtained regression coefficients compute predicted target values for each data row. The differences between the predicted and observed target values are called residuals. The model is then tested for significance with the following F test:

1. Calculate the mean square for the error source (the unexplained variance).
 - a. Calculate the sum of squares for residuals.
 - i) Take the square of each residual and add them together.
 - b. Divide the sum of squares for the error source by the appropriate degrees of freedom.
2. Calculate the mean square for the regression model (the explained variance).
 - a. Calculate the sum of squares for the model.
 - i) For each row, subtract the overall mean from the predicted target value.
 - ii) Take the square of each of these results and add them together.
 - b. Divide the sum of squares for the regression model by the appropriate degrees of freedom.
3. Divide the mean square for the regression model by the mean square for the error source. In other words, calculate the ratio of explained variance to unexplained variance. This ratio is the F value.

The F value is compared to a theoretical F distribution to determine the probability of obtaining the F value by chance.

- This probability is the significance value.
- If the significance value is less than the significance level, the means are significantly different.

Adjusted R² is used to estimate the regression model predictive strength. The significance level is set to 5% and the model predictive strength must be greater than 10% to indicate a reliable predictive relationship between the target and an input field.

Model selection

The model selection procedure depends on whether a categorical predictor is present or not. When only a continuous predictor is specified, the following three models are considered.

1. Constant model that always predicts the overall mean.
2. Linear model with the single predictor added to the constant.
3. Quadratic model where the square predictor is added to the linear model.

A quadratic model is selected if it is significant and it provides a relative improvement in predictive strength of at least 10% over the linear model. If selected, the quadratic fit line is reported together with the model predictive strength.

Otherwise, a linear model is selected if it satisfies the same conditions when compared to the constant model. If selected, the linear fit line is reported together with the model predictive strength.

If none of the previous models are selected. The overall mean is reported and no predictive relationship is reported between the target and the input.

When a categorical predictor is present, the selection process is more complex because up to eight different models are considered. The selection steps are similar to the previous steps as the most complex model that is significant and provides enough relative improvement over the first nested model is selected.

Predictive strength is reported for the selected model and the appropriate fit lines, depending on the model and the number of categories in the categorical predictor that is selected, if any. The number of categories in the categorical predictor is limited to 3 to reduce the number of displayed fit lines.

Studentized residual test

The studentized residual test is computed as regression model residual divided by its adjusted standard error.

Note: This statistical test is a fixed system operation and cannot be modified.

Residuals are obtained by subtracting the target value that is predicted by the regression model, from observed target value for each data row. The standard error is given by the square root of the mean square for the error source. The adjustment of the standard error consists of multiplying it by the square root of the leverage value that is subtracted from one. The leverage value is computed based on the design matrix and design matrix row for the data row. It adjusts the standard deviation by using predictor values.

An outlier test for studentized residuals is conducted by comparing the absolute value of studentized residual with threshold value 3. Studentized residuals are distributed according to t distribution and the probability of being greater than the threshold is less than 1%.

Points with highest ranking studentized residuals above the threshold value are reported as meaningful differences that are outliers in this case.

Sum comparison test

The sum comparison test is a chi-square test that tests whether the sum of a specified measure is equal across all categories of the explanatory field.

Note: This statistical test is a fixed system operation and cannot be modified.

If the chi-square test value is significant, the sums are not all equal.

The test is constructed under the assumption that both means and counts of the measure are equal across different categories. The test uses a chi-square value. The following procedure describes how the chi-square value is calculated:

1. Calculate the overall mean for the measure.
2. Calculate the mean square for the measure error.
 - a. Calculate the sum of squares for the measure error.
 - i) Within each category, subtract the category's mean from each record value.
 - ii) Take the square of each difference and add them together.
 - b. Divide the sum of squares for the error source by the appropriate degrees of freedom.
3. Calculate the squared error for the sum per category.
 - a. Multiply mean square for the measure error by the expected category count.
 - i) Use the total count divided by the number of categories as expected count.
 - b. Multiply the squared count error by the square of the overall mean.
 - i) Subtract the expected count from the total count.
 - ii) Multiply this result by the expected count.
 - iii) Divide this result by the total count.
 - iv) Multiply this result by the square of the overall mean.

- c. Add these two calculated terms to obtain the squared error for the sum.
4. Compute the chi-square term for each category.
 - a. Compute the square of the difference of the average sum and the category sum.
 - b. Divide the result by the squared error for the sum per category.
 5. Sum the chi-square terms from all categories. This sum is the chi-square value.
- The chi-square value is compared to a theoretical chi-square distribution with appropriate degrees of freedom to determine the probability of obtaining the chi-square value by chance.
- This probability is the significance value.
 - If the significance value is less than the significance level, the means are significantly different.

Sum influence test

The sum influence test compares the sum of a measure in a category with the average sum value for the measure across all categories of explanatory field.

Note: This statistical test is a fixed system operation and cannot be modified.

Considering the significance value and effect size, the test identifies influential categories.

The sum influence z-statistic uses the error of the sum per category that is obtained as a square root of the squared error of the sum per category that is described in the sum comparison test. The corresponding z-statistic is specified as the difference between the category sum and the average sum that is divided by the error of the sum per category.

The z-statistic value is compared to a theoretical standard normal distribution with mean zero and variance one to determine the probability of obtaining the z-statistic value by chance.

- This probability is the significance value.
- If the significance value after a Bonferroni adjustment is less than the significance level, the category is judged to be influential. The Bonferroni adjustment is necessary because multiple z tests are conducted, one for each category.

The effect size is influential category strength. It is computed as the absolute value of the z-statistic divided by the square root of the category count. Meaningful differences highlight the categories with the highest effect size.

Statistical terms

Many statistical terms appear in IBM Cognos Analytics. It is important to understand the definitions of these terms as they apply to Cognos Analytics.

Adjusted count R-squared

Adjusted count R-squared is a measure of improvement from the constant model to the fitted model.

It is obtained by computing the model classification accuracy improvement over the constant model and dividing it by the constant model classification error. Constant model always predicts the target mode and its classification accuracy is estimated by the mode frequency. Reliable predictive relationship is reported when the model predictive strength is greater than a default threshold of 10%.

In some calculations of the adjusted count R-squared, data for categories with low total counts are not used in the calculation. This filtering reduces the influence of low-frequency categories.

Adjusted count R-squared category filter

In some calculations of the adjusted R² accuracy, data for categories with low total counts are not used in the calculation.

This filtering reduces the influence of low-frequency categories.

Adjusted R squared

Adjusted R² is a corrected goodness-of-fit (model accuracy) measure for linear models. It identifies the percentage of variance in the target field that is explained by the input or inputs.

R² tends to optimistically estimate the fit of the linear regression. It always increases as the number of effects are included in the model. Adjusted R² attempts to correct for this overestimation. Adjusted R² might decrease if a specific effect does not improve the model.

Adjusted R squared is calculated by dividing the residual mean square error by the total mean square error (which is the sample variance of the target field). The result is then subtracted from 1.

Adjusted R² is always less than or equal to R². A value of 1 indicates a model that perfectly predicts values in the target field. A value that is less than or equal to 0 indicates a model that has no predictive value. In the real world, adjusted R² lies between these values.

Categorical

Categorical is a type of measurement level. A categorical field is a field with a limited number of distinct values. The values represent a type or kind.

An example of a categorical field is gender, which has Male and Female values. Another example is car model.

Categorical fields can be further classified as nominal or ordinal fields.

Chi-square value

The chi-square value is a value on the chi-square distribution. A statistical test generates a chi-square value. The value specifies the probability of obtaining the chi-square value from chance. If the probability is less than the significance level, the test is judged to be statistically significant.

The chi-square distribution is a theoretical distribution. There are many of these distributions, and each of them differs based on the degrees of freedom.

Chi-square adjustment for sparse data

In some applications of the chi-square statistical test, the calculation of the chi-square value is adjusted by a small factor.

This adjustment gives a more reliable measure of the statistical significance when the data is sparse.

Continuous

Continuous is a type of measurement level. A continuous field is measured numerically so that distance comparisons between values are appropriate.

Examples of continuous fields include age in years and income in thousands of dollars.

Cramér's V

Cramér's V is an effect size measurement for the chi-square test of independence. It measures how strongly two categorical fields are associated.

The effect size is calculated in the following manner:

1. Determine which field has the fewest number of categories.
2. Subtract 1 from the number of categories in this field.
3. Multiply the result by the total number of records.
4. Divide the chi-square value by the previous result. The chi-square value is obtained from the chi-square test of independence
5. Take the square root.

| Table 3. Interpretation of effect size | |
|--|--|
| Effect size (ES) | Interpretation |
| $ES \leq 0.2$ | The result is weak. Although the result is statistically significant, the fields are only weakly associated. |
| $0.2 < ES \leq 0.6$ | The result is moderate. The fields are moderately associated. |
| $ES > 0.6$ | The result is strong. The fields are strongly associated. |

Decision rule

A decision rule is a set of conditions that classify records. The rule predicts an outcome in the target field.

Viewing the decision rules helps you determine which conditions are likely to result in a specific outcome. For example, consider some hypothetical decision rules that could predict churn. These rules might identify classifications based on the ranges for customer age and number of previous claims. From these rules, you might observe that customers who have no or 1 claim and are older than 50 are more likely to churn.

The decision rule corresponds to a branch in a decision tree.

Departure from overall distribution

Departure from overall distribution is an effect size measurement for the distribution test. It measures the extent to which a conditional distribution does not match the marginal distribution of the target field.

A large effect size suggests that the conditional distribution is very different from the overall target distribution.

The following procedure describes how the effect size is calculated:

1. Subtract 1 from the number of target categories.
2. Multiply this result by the total count in the conditional group.
3. Divide the chi-square value of the distribution test by this result.
4. Take the square root.

| Table 4. Interpretation of effect size | |
|--|---|
| Effect size (ES) | Interpretation |
| $ES \leq 0.2$ | The result is weak. Although the result is statistically significant, the conditional distribution does not differ much from the overall target distribution. |
| $0.2 < ES \leq 0.6$ | The result is moderate. The conditional distribution differs a moderate amount from the overall target distribution. |
| $ES > 0.6$ | The result is strong. The conditional distribution is very different from the overall target distribution. |

F value

The F value is a value on the F distribution. Various statistical tests generate an F value. The value can be used to determine whether the test is statistically significant.

The F value is used in analysis of variance (ANOVA). It is calculated by dividing two mean squares. This calculation determines the ratio of explained variance to unexplained variance.

The F distribution is a theoretical distribution. There are many of these distributions, and each of them differs based on the degrees of freedom.

The F value and the degrees of freedom of the sources of variance are used to determine the probability of the F value. The probability is the significance value for the test.

Frequency

Frequency is another word for count. It measures the total number of records or the number of records in a specific group. In other words, frequency measures how often a value occurs.

Frequency is often denoted as N .

Frequency weights

A numeric field can be used to specify frequency weights. Each record in the data may represent more than a single observations. Corresponding observation counts are frequency weights needed for building the model.

The resulting model is the same as if each record were replicated the number of times specified by the corresponding frequency weight. An additional numeric field defining regression weights can be included for multiple regression models. Regression weights are multiplied by the frequency weights when computing the model parameters.

Gini impurity measure

Gini impurity is a measure used for generating classification trees. It provides more information on the distribution of data per node than the classification accuracy used for reporting the tree accuracy.

Impurity of a classification tree node is computed using the count of each target category across all records corresponding to the given node. Gini impurity total is computed as a sum of squares of count proportions across all target categories per node subtracted from one, and the result is multiplied by the number of records.

For example, when splitting a tree node, the algorithm searches for a field with the largest improvement in total impurity computed as total impurity across all potential children nodes subtracted from the parent node total impurity.

Key driver

A key driver is an input field or combination of input fields that has a statistically significant effect on a target field. This effect is more than a mere association because the effect is directed. The input field or fields are influencing the values in the target.

Key drivers are the most important main effects and interaction effects. By identifying key drivers, you can discover which field or combination of fields have the most effect on a target. The values in the input fields are driving the values in the target.

You can use key drivers to take action on your business. For example, you discover that a key driver of customer satisfaction is staff knowledge. This result suggests that more training might improve customer satisfaction.

Important: If there are many inputs, IBM Cognos Analytics might find many drivers. Only the top 50 drivers per target are reported as key drivers.

Modified z score

The modified z score is a standardized score that measures outlier strength or how much a particular score differs from the typical score. Using standard deviation units, it approximates the difference of the score from the median.

The modified z score might be more robust than the standard z score because it relies on the median for calculating the z score. It is less influenced by outliers when compared to the standard z score.

The standard z score is calculated by dividing the difference from the mean by the standard deviation. The modified z score is calculated from the mean absolute deviation (MeanAD) or median absolute deviation (MAD). These values must be multiplied by a constant to approximate the standard deviation.

Depending on the value of MAD, the modified z score is calculated in one of two ways:

If MAD does equal 0

Subtract the median from the score and divide by $1.253314 * \text{MeanAD}$. $1.253314 * \text{MeanAD}$ approximately equals the standard deviation: $(X - \text{MED}) / (1.253314 * \text{MeanAD})$.

If MAD does not equal 0

Subtract the median from the score and divide by $1.486 * \text{MAD}$: $(X - \text{MED}) / (1.486 * \text{MAD})$. $1.486 * \text{MAD}$ approximately equals the standard deviation.

Normal distribution

The normal distribution is a theoretical distribution of values. It is often called the bell curve because the visual representation of this distribution resembles the shape of a bell. It is theoretical because its frequency distribution is derived from a formula rather than the observation of actual data.

Even though the normal distribution is theoretical, the distributions of many fields in the real world resemble the normal distribution. An example is the traditional bell curve for ranking students. Most students have average grades (the mean), while there are a few with the poorest grades and a few with the highest grades.

The assumption of normality is important for many statistical tests. If the shape of a field's distribution is not bell-shaped, some statistical tests might not be valid.

The normal distribution is symmetric about the mean. That is, the distributions of values to the right and left of the mean are mirror images. 68% of the values in the distribution fall within one standard deviation of the mean (to the left and right). 95% of values fall within two standard deviations, and 99.7% within three.

Overall distribution

The overall distribution is the distribution of records in the target field before any grouping with the input field or fields.

The overall distribution is essentially the expected distribution. If the inputs have no effect on the target, the input categories and levels (bins) would have the same distribution as the overall distribution. Comparing these distributions (conditional distributions) to the overall distribution can reveal the effect of the input categories or levels. The distribution of records in the target field might change for the categories or levels.

For example, if the input field is gender and the target field is favorite color, the overall distribution is the number of people for each color. This distribution is compared to the conditional distributions, which are the number of men for each color and the number of women for each color.

IBM Cognos Analytics compares conditional distributions to the overall distribution in the following analyses:

- Key drivers for categorical target. The overall distribution is the marginal distribution of the target field. For one input, the comparison shows how the distribution changes for each category or level (bin) in the input field. For two inputs, the comparison shows how the distribution changes for each combination of categories or levels in the input fields.

- Decision trees. The overall distribution is the distribution of the root node, which is also the marginal distribution of the target field. The comparison shows how the distribution changes in each node.

Regression weights

An optional numeric field can be used to specify regression weights for a multiple regression model. Regression weight for a given record corresponds to influence of the observation on the computed model parameters. An example of regression weight field is size field in a bubble visualization.

Regression weights are used in addition to, and independently of the frequency weights when estimating the multiple regression model parameters.

R²

R² measures how well a regression model fits the actual data. In other words, it is a measure of the overall accuracy of the model. R squared is also known as the coefficient of determination.

In IBM Cognos Analytics, R² is used to measure the accuracy of a CHAID regression tree.

R² is measured on a scale of 0 to 1. A value of 1 indicates a model that perfectly predicts values in the target field. A value of 0 indicates a model that has no predictive value. In the real world, R² lies between these values.

When there is only one input, R squared is same as the Pearson correlation square.

Significance level

The significance level is the cutoff for judging a result as statistically significant. If the significance value is less than the significance level, the result is judged to be statistically significant. The significance level is also known as the alpha level.

IBM Cognos Analytics uses the significance level 0.05. This number means that a statistically significant result has less than a 5% chance of occurring from chance.

Significance value

The significance value, or p value, is the probability that a result occurred by chance. The significance value is compared to a predetermined cutoff (the significance level) to determine whether a test is statistically significant. If the significance value is less than the significance level (by default, 0.05), the test is judged to be statistically significant.

The significance value does not indicate whether a result is practically significant. Effect size is another measure from a statistical test. It helps determine the practical significance. IBM Cognos Analytics uses both the significance value and the effect size to determine whether a result is important enough to display.

Standard error

The standard error is an estimate of how much the value of a test statistic varies from sample to sample. It is a measure of the uncertainty of the test statistic. Standard error might be abbreviated as std. error.

The standard error is calculated by taking the standard deviation of the sampling distribution for the test statistic. The sampling distribution is the distribution of all possible samples.

Imagine you were conducting a survey and randomly chose 1,000 people for the survey. This group is one sample. You can choose another random sample of 1,000 people, and another sample, and another sample, and so on. You can then calculate the mean for each sample. The distribution of these sample means is the sampling distribution. By calculating the standard deviation of this distribution, you obtain the standard error of the mean. When standard error is written without qualification, it is assumed to be the standard error of the mean.

You can also calculate the standard error of the kurtosis and the standard error of the skewness. To calculate the standard error of the kurtosis, you calculate the kurtosis for each sample and take the

standard deviation of the resulting distribution. The standard error of the skewness is similar except that you calculate the skewness of each sample.

Statistical distribution

A statistical distribution, or probability distribution, describes how values are distributed for a field. In other words, the statistical distribution shows which values are common and uncommon.

There are many kinds of statistical distributions, including the bell-shaped normal distribution. We use a statistical distribution to determine how likely a particular value is. For example, if we have a chi-square value, we can use the chi-square distribution to determine how likely this chi-square value is.

Statistical significance

Statistical significance is a judgment of whether a result occurs because of chance. When a result is statistically significant, we mean that it is unlikely that the result occurs because of chance or random fluctuation.

There is a cutoff for determining statistical significance. This cutoff is the significance level. If the probability of a result (the significance value) is less than the cutoff (the significance level), the result is judged to be statistically significant.

Statistical significance does not imply anything about the practical significance of a result. Furthermore, as the number of records increases, more results are statistically significant (less than the significance level) by chance. The effect size can account for these facts. The effect size helps determine whether a result has practical significance and is not influenced by the overall number of records (sample size).

Studentized residuals

Studentized residuals allow comparison of differences between observed and predicted target values in a regression model across different predictor values. They can also be compared against known distributions to assess the residual size.

Residuals for regression models are obtained by subtracting the target value predicted by the model from observed target value for each data record. Studentized residual is computed as the regression residual divided by its adjusted standard error.

Standard error of the residual is given by the square root of the mean square for the error source. The adjustment of the standard error consists in multiplying it by the square root of leverage value subtracted from one. Leverage value is computed based on the design matrix and design matrix row for the given data row. It adjusts the standard deviation by taking into account predictor values. As a result, all studentized residuals have the same standard deviation.

t value

A t value is the result of a statistical test. The value is located on the Student's t distribution that is appropriate for the degrees of freedom. The location specifies the probability of obtaining the t value from chance. If the probability is less than the significance level, the result is judged to be statistically significant.

The Student's t distribution is a theoretical distribution. There are many of these distributions, and each of them differs based on the degrees of freedom.

The t value is typically calculated by taking the difference of observed and expected means and dividing the difference by the standard error.

Chapter 3. Stories

Stories can help you inform and engage your audience. You can use stories in IBM Cognos Analytics to create scenes that visualize your data and to tell a narrative.

What is a story?

A story is a type of view. A story is composed of a set of scenes that are displayed in sequence over time. Stories can be used to provide your data with a visual narrative.

What is a scene?

A scene can be considered as a container for a sequence of objects, such as widgets, data, or animations. The objects in a scene are also placed into a timeline, which dictates when the objects appear in the scene.

How is a story different from a dashboard?

Stories are similar to dashboards because they also use visualizations to share your insights. Stories differ from dashboards because they provide an over-time narrative and can convey a conclusion or recommendation.

For example, each scene can contain an analysis, insight, or piece of information that is revealed as the viewer plays the scenes in the story. The scenes build upon each other until the final scene, which provides a conclusion or summary.

What can I use to assemble a story?

You can add the following to your scenes when creating a story:

- Visualizations from your collection of pins
- New visualizations from your data set
- Text, media, web pages, images, and shapes

What are animations?

Animations are one of the properties that a widget can have. By using animations, you can define how widgets enter and exit your scenes.

Getting started with your first story

Stories are an effective way to present and share your data. In this tutorial, you will learn how to create a story, an outline, and how to animate a scene.

While there are no rules for how you can create a story in IBM Cognos Analytics, this tutorial will provide you with a sense of the workflow involved in creating a story. The following is the workflow that this tutorial uses in creating a story:

1. Create a new story
2. Create an outline
3. Populate the scenes
4. Adjust the timeline
5. Add animations

Creating a new story

To begin, create a new, blank story. A story contains your scenes, widgets, and any data that you want to include in it.

About this task

Start off by creating a new slideshow story. Slideshows are simple, flexible, and resemble more traditional presentations. When you're familiar with how the slideshows work, you can experiment with other story transition types.

Procedure

1. Click the **Open menu** icon  , and then click **+ New**.
2. Click **Story**.
3. Select a **Slideshow** transition style.
4. Click **Create**.

Results

Your new slideshow-style story is created. The story is where you can add your scenes.

For more information about creating a blank story, see [“Creating a new story from scratch” on page 210](#).

What to do next

Next, organize your ideas into an outline. You can use scenes to create this outline.

Creating an outline

You can create a simple outline for your story by using scenes.

About this task

To keep your points organized, you can create a simple outline for your story by using scenes. For example, your outline can consist of the following points:

- An introduction
- The company business model
- A history of past performances
- A conclusion / future goals

For each of these points, create a scene and name the scene.

Procedure

1. Click **Scene selector**  to open the scene selector.
2. Click **Add a new scene with default template** .

Results

The **Scene Selector** bar is now be populated with scenes, outlining your story. You can add or delete scenes later where you see fit.



For more information about using scenes in your story, see “[Working with scenes](#)” on page 220.

What to do next

After you have an outline for your story, it's time to start populating your scenes with data and widgets.

Populating your scenes

Populate your scenes by adding widgets to the canvas.

About this task

After you have created an outline for your story, you can now begin to compose your scenes. The composition of your scene is important. The canvas of your scene should not be too crowded and the placement of the widgets should guide the viewer's eye towards information in a specific order.

At this stage, don't worry about adding entry and exit animations. You want to work on the final composition of your widgets and how they will look on the screen.

Procedure

1. Click **Edit or preview** and ensure that you are in edit mode.
2. Click **Scene selector** to open the scene selector.
3. From the scene selector, click the scene that you want to populate.
4. Use the left pane to select widgets or visualizations to add to your canvas.
5. Rearrange the widgets and visualizations.
6. When you are done with the composition of the canvas, click the **Full screen** icon to view it in full screen. If your composition looks distorted in full screen, continue to adjust it in the canvas.

Results

Your scene is populated. Below is an example of a populated scene.

Sample Outdoors Company



Tip:

- If you are sharing your story with other people, use the **auto** option for text size. This will ensure that the text scales appropriately for different screen sizes and resolutions.
- Are you having trouble fitting everything into a single scene? That might be a sign that your scene contains more than one major message and that you should split the scene into two or more scenes.

For more information on adding widgets to your scenes, see [“Adding widgets” on page 212](#).

What to do next

After your scene is composed and you're happy with the layout, you can begin adjusting the timeline to define when your widgets appear.

Adjusting the timeline

Use the timeline to define when widgets appear on your canvas.

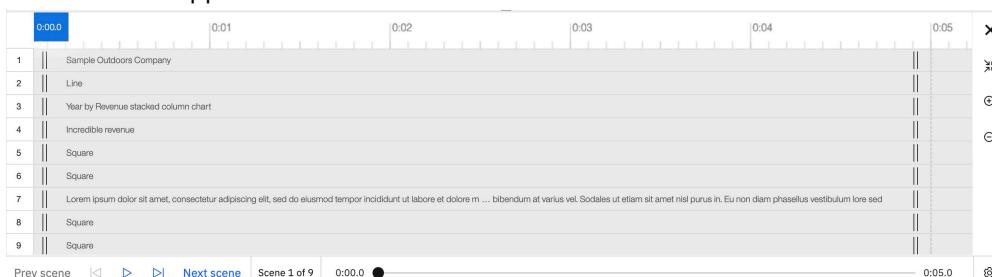
Before you begin

Presenting all of your data at the same time can be overwhelming to your audience. Consider the order in which the widgets on your canvas appear.

For example, you can define when certain text boxes appear, if you have multiple text boxes. Controlling the time and speed in which objects appear on your canvas helps viewers to focus only on one point at a time.

About this task

By default, when you add a widget to your canvas, the corresponding timeline object is added to the beginning of the timeline. As the timeline slider moves during playback, objects that the timeline slider moves across appear on the canvas.



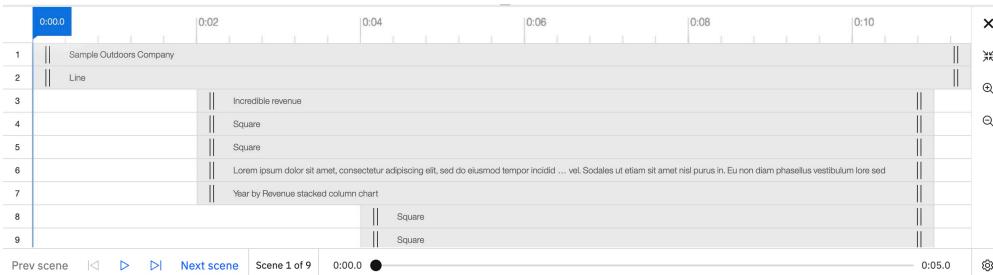
Drag the individual objects in the timeline to define when the corresponding widget appear and disappear from the canvas.

Procedure

1. Click **Edit or preview** and ensure that you are in edit mode.
2. Click **Scene selector** to open the scene selector.
3. From the scene selector, click the scene with the timeline that you want to adjust.
4. Click **Open timeline** .
5. Drag and reposition the objects on the timeline that you want to adjust.

Results

In the example, groups of widgets are placed on the timeline to appear roughly 2 seconds apart from each other.



During playback, the widgets appear on the canvas according to the position of the timeline slider.

For more information about the timeline, see [“Using the timeline” on page 218](#).

What to do next

Now that you determined when your widgets appear on the canvas, it's time to use animations to define how they appear.

Adding animations

Use animations to define how widgets enter and exit your scenes.

About this task

Animations can be used to make your story more dynamic and memorable. The default widget animation is the fade animation. The fade animation works in most situations. You can change this animation type, but having too many different animation types can be distracting to the viewer.

Tip: Generally, you shouldn't have widgets overlap one another when the widgets enter or exit a scene. Based on the animation type that you choose for your widgets, pay attention to the direction in which they enter or exit.

Procedure

1. Click **Edit or preview** .
2. Click **Scene selector** .
3. Click the scene, which contains the widget that you want to add an animation to.
4. Click **Open timeline** .
5. Click the widget that you want to add an animation to.
6. Click **Open animation properties** .
7. Expand **Entrance** or **Exit**, depending on if you want to add an animation to the beginning or end of your widget.
8. Select the animation type from the **Animation** menu.
9. If applicable, select the direction of the animation from the **Direction** menu.

Results

For more information on how you can add animations to your widgets, see [“Adding animations” on page 215](#).

For more information on the different types of animations that you can add to your widgets, see [“Animation types” on page 214](#).

What to do next

Congratulations, you created a story, an outline, populated a scene, adjusted the timeline, and added animations! Continue this process for the rest of your scenes. When you finish, you can define their playback options or share your story.

For more information about playback options, see [“Playback options” on page 221](#).

For more information about sharing your story, see [“Sharing your story” on page 224](#).

Creating a story

Stories are effective ways to share a narrative. They can be as simple or as complex as you need them to be. You can create a story from scratch or from an existing dashboard.

Creating a story from a dashboard

You can take a dashboard and create a story from it.

About this task

By default, all scenes are 5 seconds long.

Procedure

1. Open a dashboard.
2. Expand the save menu.
3. Select **Save as a story**.
4. Select a template and click **Select**.
5. Define a name.
6. Click **Save**.

Creating a new story from scratch

You can create a story from scratch and define the transition style.

Procedure

1. Click the **Open menu** icon , and then click **+ New**.
2. Click **Story**.
3. Under **Create a story**, select one of the following transition styles:

Slideshow

Select this transition style to tell a story through a series of slides or scenes.

Guided journey

Select this transition style to guide an audience on a journey that starts out as the full picture of the story and then pans and zooms into the details across the canvas.

To learn more about transition styles, see [“Transition styles” on page 211](#).

4. Click the layout that you want to use.
5. Click **Create**.

The template with predefined text widgets and blank visualizations opens. The scene selector  icon at the bottom of the window contains one or more scenes with the default template.

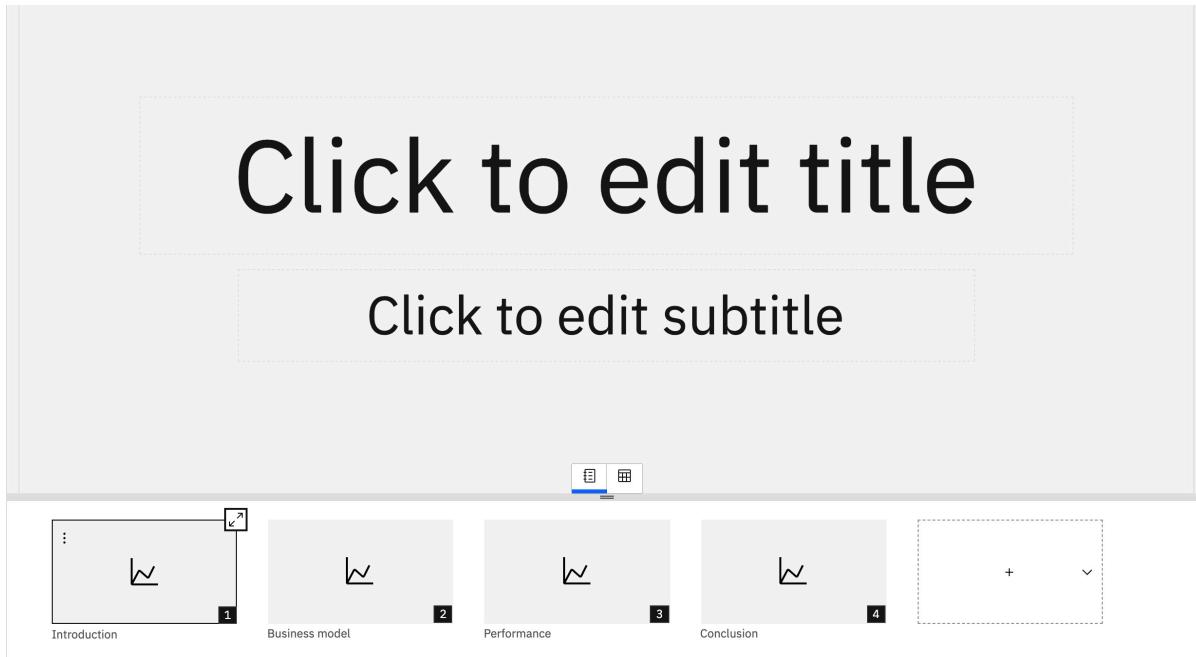
Transition styles

Transition styles allow for seamless scene transitions and they help to highlight the progression from one scene to another.

You can choose between two different transition styles for your story.

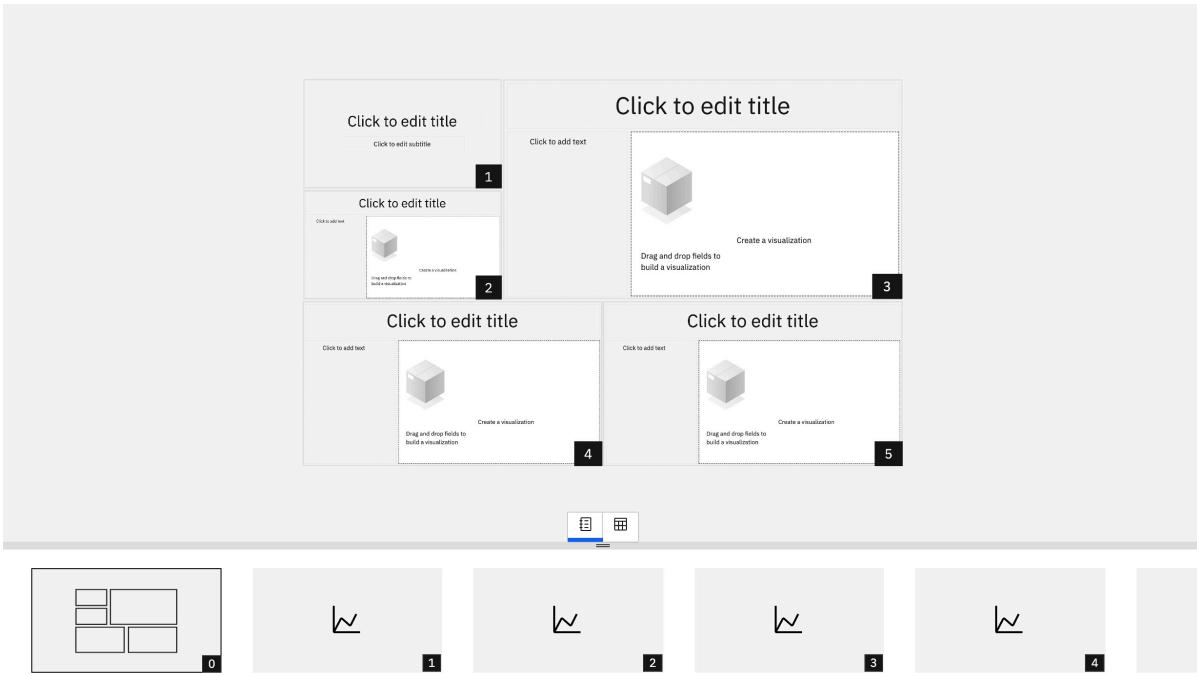
Slideshow

A slideshow transition style presents each of your story's scenes sequentially. Each scene is presented on a new canvas, all managed automatically.



Guided journey

A guided journey layout is a collection of scenes on a single canvas. When you play a story with a guided journey transition style, the presentation zooms and pans on each individual scene in a sequential order. Each guided journey contains a template for different scene orders and layout. At the beginning and end of the presentation, the viewer is shown an overview of all of the slides.



Adding widgets

Widgets can be added to your canvas to illustrate a scene. You can add text, images, videos, shapes, and data to the canvas of a scene in the form of a widget.

Adding visualizations from your collection of pins

You can add a visualization, from your pins, as a widget.

Procedure

1. Click **Pins** , which is located in the side bar.
2. Drag an item from the **My pins** pane onto the canvas.
3. Move the widget to a location on the canvas.

Creating a widget from a new visualization

You can create a widget from a new visualization.

Procedure

1. Click **Visualizations** , which is located in the side bar.
2. Select a visualization type.
3. Select a source from the **Selected sources** pane.
4. Drag your data into the visualization.
5. Click the **Collapse** icon.
6. Move the widget to a location on the canvas.

Creating a widget from the data tray

You can create a widget from a column in the data tray.

Procedure

1. Click **Data tray** .
2. Drag a column heading from the data tray, onto the canvas.
3. Move the widget to a location on the canvas.

Creating a single column widget from the source pane

You can create a widget from a column in the source pane.

About this task

When you create a widget from a column, Cognos Analytics automatically chooses the visualization type based on the type of column. You can change the visualization type after the widget is added.

Procedure

1. Click **Sources** , which is located in the side bar.
2. Add or select a source.
3. Drag a column from the **Sources** pane onto the canvas.
4. Move the widget to a location on the canvas.

Creating a multi-column widget from the source pane

You can select multiple columns in the source pane to create your widget.

Procedure

1. Click **Sources** , which is located in the side bar.
2. Add or select a source.
3. Select your columns (Ctrl + click).
4. Drag the columns onto the canvas.
5. Move the widget to a location on the canvas.

Creating a widget from a new calculation

You can create a widget from a new calculation.

Procedure

1. Click **Sources** , which is located in the side bar.
2. Add or select a source.
3. Select two measures (Ctrl + click two measures).
4. Click the ellipsis , next to either of the two measures.
5. Click **Create calculation** .
6. Define your calculation.
7. Click **OK**.

8. Drag the new calculation column onto the canvas.
9. Move the widget to a location on the canvas.

Animation types

There are different types of animations for widgets and animation types for specific data widgets. Use animations to define how your widgets enter or exit a scene.

Widget animations

You can use widget animations to define how a widget enters or exits a scene.

Fade

You can use the **Fade in/Fade out** animation type to transition a widget in or out with a fading effect. The fade animation can be applied to a widget as an entrance or exit animation.

For more information about adding animations to your widget, see [“Adding widget animations” on page 216](#)

Slide

You can use the **Slide in/Slide out** animation type to transition a widget in or out with a sliding effect.

The Slide animation can be applied to a widget as an entrance or exit animation.

For more information about adding animations to your widget, see [“Adding widget animations” on page 216](#).

Scale

You can use the **Scale in/Scale out** animation type to transition a widget in or out with a scaling effect.

The Scale animation can be applied to a widget as an entrance or exit animation.

For more information about adding animations to your widget, see [“Adding widget animations” on page 216](#).

Shrink and Expand

You can use the **Shrink in/Expand out** animation type to transition a widget in or out with a shrinking or expanding effect.

The Shrink animation can be applied to a widget as an entrance animation. The Expand animation can be applied to a widget as an exit animation.

For more information about adding animations to widgets, see [“Adding widget animations” on page 216](#).

Pivot

You can use the **Pivot in/Pivot out** animation type to transition a widget in or out with a pivoting effect.

The Pivot animation can be applied to a widget as an entrance or exit animation.

For more information about adding animations to your widget, see [“Adding widget animations” on page 216](#).

Data animations

Certain data widgets feature data animations. Data animations define how the data enters the scene. Data widget animations can be used along with regular widget animations.

Wipe

You can use the **Wipe** data animation type to transition the data in your widget in with a wipe effect from the side.

The Wipe data animation can be applied to a data widget as a data entrance animation.

The **Entry stragger** setting staggers the data entrance animation as it appears.

The **Entry animation duration** setting defines the time that it takes for the data entrance animation to complete.

For more information about adding animations to your widget, see [“Adding entrance animation to data” on page 217](#).

Grow

You can use the **Grow** data animation type to transition the data in your widget with a grow effect. The grow effect starts from the bottom of the data widget.

The Grow data animation can be applied to a data widget as a data entrance animation.

The **Entry stragger** setting staggers the data entrance animation as it appears.

The **Entry animation duration** setting defines the time that it takes for the data entrance animation to complete.

For more information about adding animations to your widget, see [“Adding entrance animation to data” on page 217](#).

Adding animations

You can apply animations to your widgets to make your story more dynamic and memorable.

Adding widget animations

Widget animations can enhance your stories by directing and focusing your audience's attention to key information at the right time. You can add widget animations easily in IBM Cognos Analytics using different widget animation types.

About this task

You can add widget animations to the beginning or the end of a widget in your scene's timeline. These animations are called **Entrance** and **Exit** animations.

Note:

- If you are adding an **Entrance** animation to your widget, ensure that the widget is not at the beginning of your scene's timeline. If your widget is at the beginning of your scene's timeline, you can drag the widget to the right, away from the beginning of the scene.
- If you are adding an **Exit** animation to your widget, ensure that the widget is not at the end of your scene's timeline. If your widget is at the end of your scene's timeline, you can add another widget to the scene. Adding a widget at the end of the timeline ensures that the new widget's end duration is later than the one you want to add an animation to.

Procedure

1. Click **Edit or preview** .
2. Click **Scene selector** .
3. Click the scene, which contains the widget that you want to add an animation to.
4. Click **Open timeline** .
5. Click the widget that you want to add an animation to.
6. Click **Open animation properties**  from the context menu.
7. Depending on if you want to add an animation to the beginning or end of your widget, expand **Entrance** or **Exit**.
8. Select the animation type from the **Animation** menu.
9. If applicable, select the direction of the animation from the **Direction** menu.

Adding a widget animation using the properties pane

You can add animations to your widget from the properties pane.

Procedure

1. Click **Edit or preview** .
2. Click **Scene selector** .
3. Click the scene with the widget you want to add an animation to.
4. Click the widget that you want to add an animation to.
5. Click **Properties** .
6. Click the **Animation** tab.
7. From the lists, select animation effects for your widget.

Adding a widget animation using the timeline

You can add animations to your widget from the timeline.

Procedure

1. Click **Edit or preview** .
2. Click **Scene selector** .
3. Click the scene with the widget you want to add an animation to.
4. Click the widget that you want to add an animation to.
5. Click **Properties** .
6. Click the **Animation** tab.
7. From the lists, select animation effects for your widget.

Adding entrance animation to data

You can add **Data entrance** animation properties to some visualization types.

About this task

Add the following entrance animation to some types of visualizations.

- Entry animation type
- Entry stagger
- Entry animation duration

You cannot add an entrance animation to a widget that starts at the beginning of the timeline. You also cannot add an exit animation to a widget that ends at the end of the timeline.

Procedure

1. Click **Edit or preview** .
2. Click **Scene selector** .
3. Click the scene with the widget you want to add an animation to.
4. Click the widget that you want to add an animation to.
5. Click **Properties** .
6. Click the **Animation** tab.
7. Expand **Data entrance**.
8. Select the type of entrance animation from the **Entry animation type** list.
9. Click the **Entry stagger** toggle when you want your data to stagger in at different times when you play your story.
10. Use the **Entry animation duration** field to define how long the entrance animation takes to complete.

Using the timeline

You can use the timeline to define when a widget enters or exits a scene, and to test a scene.

About this task

By default, all objects and widgets in a scene are visible for the full duration of the scene. To make an object appear or disappear, change the start time or end time that the object is visible anywhere along the timeline. The default duration for a scene is five seconds, which you can change.

Procedure

1. Open the story. The scene selector  contains the scenes in the story.
2. Click **Open timeline** .
3. To change the canvas layering order of objects in a scene, click and drag timelines up and down to reorder them. You can also click and drag objects in the timeline from side to side.
4. To change the granularity of the timeline, click **Zoom in** , **Zoom out** , or **Zoom to fit** .
5. Test the scene in any of the following ways:
 - Click **Play** .
 - Slide the timeline scrubber along the timeline to see what the scene looks like at a specific point in time.
6. To close the timeline and return to the scene selector, click **Close** .

Using the timeline scrubber

You can use the timeline scrubber to define when objects enter and exit your scene.

About this task

The timeline scrubber is a timer with a red line that indicates a point in time in the scene. You can drag the time scrubber along the timeline to jump to a specific time in the scene.

Procedure

1. Open the story. The scene selector  contains the scenes in the story.
 2. Click **Open timeline**  to display the timeline.
 3. To change the timing of an object, drag the start and end points of its timeline.
- Tip:** If an object that you know exists in the scene appears to be missing from the scene, it's because the time scrubber is at a point in the scene at which the object is not visible. Slide the time scrubber along the timeline until the object appears.

Defining when objects enter or exit a scene

You can enter an exact time for when an object enters or exits a scene.

About this task

You can use the animation properties pane to define an exact time for when an object enters or exits your scene.

Procedure

1. Click **Open timeline**  to display the timeline.
2. From the timeline, click the object that you want to define an exact entrance or exit time for.
3. Click **Open animation properties** .
4. Click the **Animation** tab.
5. Use the **Start at (secs)** field to define an exact entrance time for the object.
6. Use the **End at (secs)** field to define an exact exit time for the object.

Changing a timeline title for media, web pages, and images

When you are working with the timeline for a scene, you can give useful titles to media, web page, and image objects. This makes it easier to understand which objects you are working with in a timeline.

Procedure

1. Click a media, web page, or image widget on the canvas.
2. Click **Properties** .
3. Under the details for the object, type a title in the title field, then click away from it.

Highlighting data in the timeline

You can use highlights to bring attention to specific data in your scene or to create navigation markers on your timeline.

About this task

Highlighting data brings attention to specific details that you want to convey to your audience.

You can define the data that you want to highlight and when you want the highlight to appear. For example, you can add a bar chart widget that displays a highlighted bar and dims all the other bars. You can have multiple highlights for a single visualization and across multiple visualizations.

Note: You can highlight data on any data widget, except for the summary data widget.

Highlighting data has the same effect as when you manually click a data item.

Note: Other visualizations in the same connection group might get filtered to the selected values if they do not contain the highlighted column.

If you enable the **Navigate markers** option, your highlights appear as navigation markers in the timeline.

Procedure

1. Open the story. The scene selector  contains the scenes in the story.
2. Click **Open timeline**  from a scene.
3. Click the slider for the visualization you want to highlight data on at the time on the timeline you want the highlight to occur.
4. Click **Add highlight**.
5. Select a data category from the list.
6. Select the specific data to highlight.
7. Click **Play**  to see the effect.
8. Drag the **Highlight**  icon along the timeline, to when you want the data to be highlighted.

9. Click the **Highlight**  icon to edit or delete the highlight.

Working with scenes

A scene is used to divide your story into separate messages or points. You can populate your scenes with text, data, and widgets.

Adding a title to a scene

Adding a title to your scene can help you to identify, organize, and navigate multiple scenes in a story.

Procedure

1. Click the ellipsis  on the scene.
2. Click **Rename scene** .
3. Enter a name for the scene.
4. Click **OK**.

Results

A title is added to your scene. You can see the title of your scene, below the scene thumbnail.

Adding a new default template scene to a story

You can add a new default template scene to a story. The default scene is determined based on the transition style of your story.

Procedure

1. Click **Scene selector**  to open the scene selector.
2. Click **Add a new scene with default template** .

Results

A new scene is created containing the default template.

Choosing a template for a new scene

You can choose the template that you want to use for a new scene.

About this task

In a story, you can quickly define the layout of your scenes by choosing a template.

Tip: Some template sections contain multipurpose widget buttons . You can use multipurpose widgets to select a widget type right on the button. You can also drag and drop a supported widget into a section with the multipurpose widget button. Supported widget types include text, image, and visualization widgets.

Procedure

1. Click **Scene selector**  to open the scene selector.

2. Click the arrow icon, beside **Add a new scene with default template** .
3. Click the template that you want to use for your scene.

Results

A new scene is created containing your selected template.

Changing the order of your scenes

You can change the order of the scenes in your story.

Procedure

1. Click **Scene selector**  to open the scene selector.
2. Drag your scenes into the order that you want.

Results

The scene is reordered in the scene selector.

Duplicating a scene

You can duplicate the scenes in your story.

Procedure

1. Click **Scene selector**  to open the scene selector.
2. Click the ellipsis  on the scene.
3. Click **Duplicate scene** .

Results

The scene is duplicated in the scene selector.

Deleting a scene

You can delete a scene in your story.

Procedure

1. Click **Scene selector**  to open the scene selector.
2. Click the ellipsis  on the scene.
3. Click **Delete scene** .

Results

The scene is deleted from the scene selector.

Playback options

Use playback options to tailor the playback experience to your needs.

You can use the following playback options in your stories:

- Navigate markers
- Play all scenes
- Loop
- Refresh at start
- Kiosk mode

Navigate markers

You can use markers to choose when to show the next piece of data or information in your playback, rather than all of the objects and widgets at together.

About this task

The **Navigate markers** option creates markers on your timeline based on when each widget and highlight appears in the timeline. During playback, the scene pauses at each marker.

Procedure

1. Open the story.
2. Click **Playback options** .
3. Enable the **Navigate markers** option.

Play all scenes

The **Play all scenes** option allows for the automatic playback of all scenes once the play button is pressed to the end of the story.

About this task

Use the playback options to control if your scenes require a presenter to manually play each scene, or if the scenes play through unattended. A presenter must press play to start a story even when **Play all scenes** is enabled.

Tip: The **Play all scenes** and the **Loop** options can be used together to create a "kiosk" mode.

Procedure

1. Open the story.
2. Click **Playback options** .
3. Enable the **Play all scenes** option.
4. If you want to test all the scenes in a story, perform ["Testing a story or a scene" on page 223](#).

Loop

During playback, the **Loop** option transitions from the last scene to the first scene.

About this task

Tip: The **Play all scenes** and the **Loop** options can be used together to create a "kiosk" mode.

Procedure

1. Open the story.
2. Click **Playback options** .

3. Enable the **Loop** option.

Refresh at start

11.1.2 You can set your story to refresh the data source each time that the story starts from the beginning.

About this task

Use the **Refresh at start** option to set whether the data is refreshed each time that your story starts. A story starts when you go to the first scene or switch to preview mode.

Note: When the **Refresh at start** option is enabled, if the **Loop** and **Play all scenes** options are also enabled, your story plays in a continuous loop and refreshes the data each time the story restarts.

Procedure

1. Open the story.
2. Click **Playback options** .
3. Enable the **Refresh at start** option.

Kiosk mode

Kiosk mode will continuously playback your entire story from start to end.

About this task

A "Kiosk" mode can be enabled when the **Play all scenes** and the **Loop** options are enabled together.

Procedure

1. Open the story.
2. Click **Playback options** .
3. Enable the **Loop** and the **Play all scenes** option.

Results

Playing your story will continuously playback your entire story from start to end.

Testing a story or a scene

After your story or a scene within a story is assembled, you can test it to see how it will look to someone who is viewing it. You also want to ensure that the visualizations appear and disappear at the correct time during the scene.

About this task

If you're testing a scene within a story, ensure that the scene that you are testing has focus in the window. If you're testing a story, focus can be on any scene in the story.

Procedure

1. To start testing a story or scene, click **Edit or preview** .
2. Switch to full screen mode by clicking .
3. Click **Next scene**  and **Previous scene**  to jump from scene to scene.

Tip: If the control menu at the bottom of the window disappears, click anywhere in the window to re-enable it. When you click in the window, your scene plays. Click in the window again to pause the scene.

4. To move through a scene, click **Play** , **Pause** , , and .

Sharing your story

You can share your whole story or link to a specific scene.

Link

You can share a link to your story. When you share a link, the link opens from the scene that the link was generated from.

1. Click **Share** .
2. Click the **Link** tab.
3. Under the **Link** header, click **Copy** .
4. Send the link to your intended audience.

Embed code

Use the embed code to embed your story in HTML.

1. Click **Share** .
2. Click the **Link** tab.
3. Under the **Embed code** header, define the width and height that you want to embed the story in.
4. Under the **Link** header, click **Copy** .
5. Send the link to your intended audience.

Export to PDF

You can export your story to PDF.

1. Click **Share** .
2. Click the **Export** tab.
3. Define the page size that you want to export your story to.
4. Define the orientation that you want to export your story to.
5. Select **Include filters** if you want to include filters in the export to PDF.
6. Click **Export**.

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