IBM Cognos Report Studio:
Author Professional Reports Fundamentals
(v10.2.2)

This course is designed for professional report authors to learn report building techniques using relational data models, and methods of enhancing, customizing, and managing professional reports. Attendees will participate in hands-on demos and workshops that illustrate key concepts while learning how to use the product.

Recommended Modality: Instructor Led and SPVC
Recommended Duration: 3 days

Topics Covered

- Explore Report Studio, different report types (list, crosstab, chart, map)
- Create and format reports using grouping, headers, footers, and other formatting options
- Focus reports by filtering data and using prompts
- Add value to your reports using calculations and additional report building techniques
- Enhance reports with advanced formatting and exceptional data highlighting
- Set up drill-through access and create drill-through reports

Intended Audience

- Professional Report Authors

Let Us Help You
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Business Analytics

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1. **Introduction to the Reporting Application**
   - Examine Report Studio and its interface
   - Explore different report types
   - Create a simple, sorted, and formatted report
   - Explore how data items are added to queries

2. **Create List Reports**
   - Format, group, and sort list reports
   - Describe options for aggregating data
   - Create a multi-fact query
   - Create a report with repeated data

5. **Present Data Graphically**
   - Create charts containing peer and nested items
   - Add context to charts
   - Create and reuse custom chart palettes
   - Add RAVE visualizations
   - Present key data in a single dashboard report

6. **Focus Reports Using Prompts**
   - Identify various prompt types
   - Use parameters and prompts to focus data
   - Search for prompt items
   - Customize prompts to facilitate users' choices
   - Navigate between pages
   - Display users' prompt selections in the report

7. **Extend Reports Using Calculations**
   - Create calculations based on data in the data source
   - Add run-time information to the reports
   - Create expressions using functions

8. **Use Additional Report Building Techniques**
   - Reuse objects within the same report
   - Share layout components among separate reports
   - Discuss report templates
   - Add pages to a report
   - Choose options to handle reports with no available data

9. **Customize Reports with Conditional Formatting**
   - Create multi-lingual reports
   - Highlight exceptional data
   - Show and hide data
   - Conditionally render objects in reports

3. **Focus Reports Using Filters**
   - Create filters to narrow the focus of reports
   - Examine detail filters and summary filters
   - determine when to apply filters on aggregate data

4. **Create Crosstab Reports**
   - Format and sort crosstab reports
   - Convert a list to a crosstab
   - Create crosstabs using unrelated data items
   - Create complex crosstabs using drag and drop functionality

10. **Drill-Through From One Report to Another**
    - Let users navigate from a specific report to a target report
    - Pass parameter values to filter the data in drill-through targets

11. **Drill-through Definitions**
    - Enable users to navigate to related data in IBM Cognos BI
    - Parameter-driven drill through vs. dynamic drill through
    - Steps to enable drill-through access for a package
    - Limit the items that users ca drill through from (set scope)
    - Set a measure as the scope
    - Drill Through Assistant

12. **Enhance Report Layout**
    - Force page breaks in reports
    - Modify existing report structures
    - Apply horizontal formatting
    - Specify print options for PDF reports
    - Combine data containers displaying data from different queries
    - Format data and report objects

Appendix A. Overview of IBM Cognos BI
   - Describe IBM Cognos BI and Financial Performance Management
   - Describe IBM Cognos BI components
   - Describe IBM Cognos BI architecture at a high level
   - Define IBM Cognos groups and roles
   - Explain how to extend IBM Cognos

IBM Cognos Report Studio:
Author Professional Reports Advanced
(v10.2.2)

This course builds on topics learned in the Fundamentals course, the Advanced course is designed for professional report authors to learn advanced report building techniques using mostly relational data models, and ways of enhancing, customizing, and managing professional reports. Attendees will participate in interactive demos and workshops that illustrate key concepts while learning how to use the product.

Recommended Modality: Instructor Led and SPVC

Recommended Duration: 2 days

Topics Covered

- Create relationships between queries (set operations, joins, query references)
- Design effective prompts to determine report contents and/or format at runtime
- Navigate reports using bookmarks, table of contents, and drill-through definitions
- Add HTML items to control the behavior of elements in your reports
- Examine and edit XML in report specifications
- Burst and distribute reports through email and IBM Cognos Connection

Intended Audience

- Professional Report Authors

Prerequisites

- IBM Cognos Report Studio: Author Professional Reports Fundamentals (v10.2)
- Knowledge of your business requirements
- Basic knowledge of SQL
- Basic knowledge of XML (recommended)

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Business Analytics

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1: Create Query Models

- Build query models and then connect them to the report layout
- Edit an SQL statement to author custom queries
- Add filters and prompts to a report using the query model

2: Create Query Reports Based on Relationships

- Create reports by merging query results
- Create reports by joining queries
- Combine data containers based on relationships from different queries

3: Create Advanced Dynamic Reports

- Filter reports on session parameter values
- Navigate a briefing book using a table of contents
- Create dynamic headers and title that reflect report data
- Let users navigate to specific locations in reports
- Create a customer invoice report

4: Design Effective Prompts

- Control report displays using prompts
- Specify conditional formatting values using prompts
- Specify conditional rendering of objects based on prompt selection
- Create sorted and filtered reports based on prompt selection

5: Create Additional Advanced Reports

- Create a report that displays summarized data before detailed data
- Highlight alternate rows in a list report
- Create a report using an external data file
- Use single data items to summarize report information

6: Examine the Report Specification

- Examine the report specification structure
- Modify a report specification
- Add custom toolbox objects and custom template options

7: Distribute Reports Through Bursting

- Distribute reports using bursting
- Create burst keys
- Identify report recipients and data items using burst tables
- Distribute reports using email and IBM Cognos Connection

8: Enhance User Interaction with HTML

- Create tooltips that clarify report data
- Send emails using links in a report

9: End-to-End Workshop (Optional)

- Various managers have requested that you create reports to answer business questions pertaining to their areas of interest

A: Explore the Prompt API (Optional)

- describe the Prompt API
- describe the uses of the Prompt API
- describe the primary objects, methods and properties used in the Prompt API
- review prompt values
- explore the enhancement of prompts in reports with the Prompt API