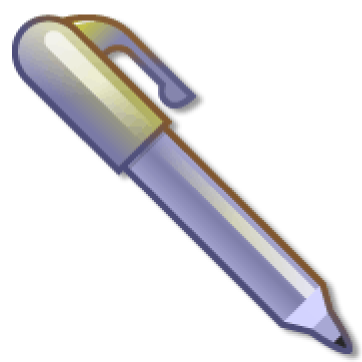
Query Studio



Query Studio Handout Index

Create a Report

Steps

1. In the IBM Cognos Connection home page, on the **Public Folders** tab, navigate to the package that you want to use as a data source.

   If there is more than one package available, the **Select a Package** page appears. **No Entries** means that no reports were created using this package.

   You may not be able to use a package if you do not have access permission. For example, if the data source is a cube, cube security may prevent you from accessing certain data. For more information, contact your administrator.

2. From the **Launch** menu in the top right corner, click the **Query Studio** link .

   Query Studio opens. The query items you can use are listed in the left pane.

   Tip: To exit Query Studio and return to IBM Cognos Connection, click **Return**.

You can now add data and save the report.

Open an Existing Report

Steps

1. From the **Manage File** menu, click **Open**.
2. Locate and click the report you want to open, then click **OK**.

   The report opens in Query Studio.

Tips

- If you want to use the report as the basis of a new report, save it using a different name.
- To browse through the pages of a report, use the links at the bottom of the page.
- To increase the available space for viewing reports, click the hide menu button in the top right corner of the menu.
- To view the menu, click the show menu button in the top left corner of the report.
- You can also resize the menu, and hide/show toolbars .

Add Data to a Report

Steps

1. Open a report in Query Studio.
2. Click the **Insert Data** menu command.

   A tree hierarchy of the selected package appears in the left pane.

   Note: If you are working with a dimensional data source, the names of levels and members in a dimension come from the model. It is the responsibility of the modeler to provide meaningful names.
3. In the left pane, double-click the items you want to add.

   The items appear in the work area.

Tips

- By default, each new report item follows the last report item, but you can insert an item in a different position. Click an existing heading in your report. The next item you add from the package precedes this heading.
- You can also control the order of items by dragging them to the work area. For example, you can drag an item between two columns that are already in your report.
- To simultaneously add several query items, use Ctrl+click to select multiple items, and then, at the bottom of the left pane, click **Insert**.
- To remove data permanently from your report, click the report item heading, then click the delete button on the toolbar.

Save a Report

Steps

1. Click the save button on the toolbar.
2. If you are saving the report for the first time, specify where you want to save the report and type a file name.

   If you want to include a description, type the information you want to add in the **Description** box.
3. Click **OK**.

Run a Report

Steps

1. Open a report in Query Studio.
2. From the **Run Report** menu, choose how to run the report:
   - To run the report using all data, click **Run with All Data**.
   - To run the report using no data, click **Preview with No Data.**

View a Report in PDF, CSV, or Excel

Steps

1. Open a report in Query Studio.
2. From the **Run Report** menu, click **View in PDF Format**.

OR

2. From the **Run Report** menu, click **View in CSV Format.**

   The report opens in a spreadsheet.
3. In the **File** menu, click **Save As**, and specify a name and location.

   The report is saved as a text file that you can import into other products.

OR

2. From the **Run Report** menu, click **View in Excel 2000 Format.**

   The report opens in a new window.

Print a Report

Steps

1. Open a report in Query Studio.
2. From the **Run Report** menu, click **View in PDF Format**.

   The report opens in PDF format.
3. On the Acrobat Reader toolbar, click print.
4. Select the print options you want and click **OK.**

Create a List Report Steps

1. In the IBM Cognos Connection home page, click the **Public Folders** tab.

   All available packages appear.

2. Click the **GO Data Warehouse (query)** package.

3. From the **Launch** menu in the top right corner, click the **Query Studio** link .

   Query Studio opens, and the **GO Data Warehouse (query)** query items appear in the left pane.

4. Expand **Sales and Marketing (query)**.

5. Expand **Sales (query)**.

6. Expand **Product**.

7. Double-click the **Product line** item.

8. Expand **Sales fact**.

9. Double-click the **Quantity** item.

   By default, the report item heading uses the name of the underlying item in the data source. You can also add a descriptive title to the report.

10. At the top of the report, click the **Title** link.

11. In the **Title** box, type

    Units Sold

12. Click **OK**.

    You now have a titled report listing the units sold for every product line.

13. Click the save button on the toolbar.

14. In the **Name** box, type

    Units Sold

15. Leave the default destination folder as **Public Folders**, and click **OK**.

Units Sold

Product line	Quantity
Camping Equipment	27,301,149
Golf Equipment	5,113,701
Mountaineering Equipment	9,900,091
Outdoor Protection	12,014,445
Personal Accessories	34,907,705
Summary	**89,237,091**

Grouped List Reports

Steps

1. Open the **Units Sold** report.
2. Click the heading of the **Quantity** column.
3. Click the **Insert Data** menu command.
4. Expand **Sales and Marketing (query)**.
5. Expand **Sales (query)**.
6. Expand **Retailer site.**
7. Double-click the **Retailer country** item.

   A column appears that represents this item, to the left of the **Quantity** column. You now have a report listing the quantity of units sold for every product line in all countries. However, you are interested only in the quantity of units sold in three specific countries. Apply a filter to include only the countries you want.
8. Click the heading of the **Retailer country** column.
9. Click the filter button on the toolbar.
10. In the **Show only the following** box, click **Germany**, **Japan**, and **United States**, and then click **OK.**

    By default, the filters appear in the subtitle.

    You can group by product line to suppress the duplicate values in the **Product line** column.
11. Click the heading of the **Product line** column.
12. Click the group button on the toolbar.

    The values in the Product line column are sorted alphabetically, and duplicate values are removed.
13. Click the save as button on the toolbar.
14. In the **Name** box, type

Grouped Units Sold

15. Leave the destination folder as **Public Folders**, and click **OK**.

Units Sold

Retailer country: Germany, Japan, United States

Product line	Retailer country	Quantity
Camping Equipment	Germany	1,547,097
	Japan	2,031,007
	United States	4,460,492
Camping Equipment		**8,038,596**
Golf Equipment	Germany	281,703
	Japan	369,778
	United States	858,351
Golf Equipment		**1,509,832**
Mountaineering Equipment	Germany	539,671
	Japan	685,229
	United States	1,591,904
Mountaineering Equipment		**2,816,804**
Outdoor Protection	Germany	773,127
	Japan	902,891
	United States	2,033,754

Create a Crosstab Report

Steps

1. Open the **Grouped Units Sold** report.
2. Click the heading of the **Retailer country** column.
3. Click the pivot button  on the toolbar.

   The values of the Country column are now column headings. The values of the Product line column become row headings. The measure is at the intersection of the two.
4. Click the save as button  on the toolbar.
5. In the **Name** box, type

   Crosstab Units Sold
6. Leave the destination folder as **Public Folders**, and click **OK**.

Units Sold

Retailer country: Germany, Japan, United States

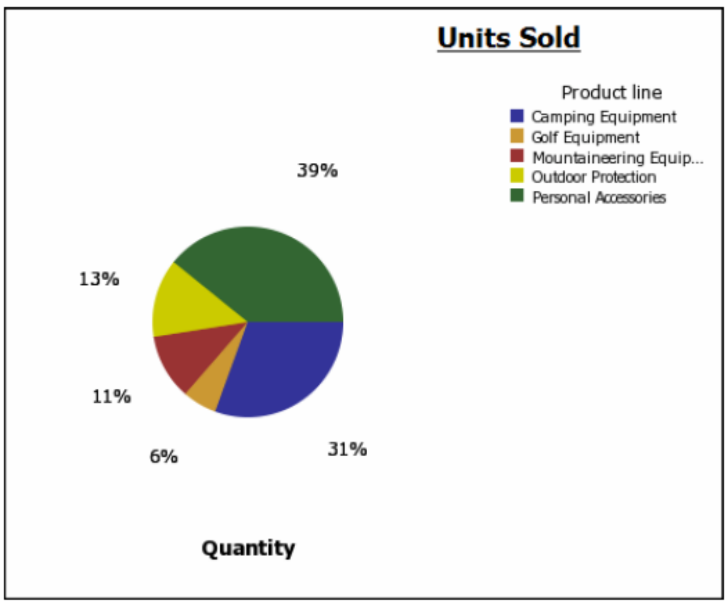
Quantity	Germany	Japan	United States	**Summary**
Camping Equipment	1,547,097	2,031,007	4,460,492	**8,038,596**
Golf Equipment	281,703	369,778	858,351	**1,509,832**
Mountaineering Equipment	539,671	685,229	1,591,904	**2,816,804**
Outdoor Protection	773,127	902,891	2,033,754	**3,709,772**
Personal Accessories	1,943,013	2,798,222	6,777,576	**11,518,811**
Summary	**5,084,611**	**6,787,127**	**15,722,077**	**27,593,815**

Create a Chart

Steps

1. Open the **Units Sold** report.
2. Click the chart button on the toolbar.
3. In the **Chart type** box, click **Pie.**
4. Click **100 Percent.**
5. Select the **Show the values on the chart** check box.
6. In **Show the following in the report,** click **Chart only,** and then click **OK.**
7. Click the save as button on the toolbar.
8. In the **Name** box, type

   Units Sold Pie
9. Leave the destination folder as **Public Folders,** and then click **OK.**



Change the Title – double click on the Title

Reorder Report Items

Steps

1. Open a report in Query Studio.
2. Click the heading of the column that you want to move.
3. Click the cut button on the toolbar.
4. Click the heading of the report item before which you want to insert the column.
5. Click the paste button on the toolbar.

   Tip: To position a column as the last column, paste with nothing selected.

Specify Rows Per Page

Steps

1. Open a report in Query Studio.
2. From the **Change Layout** menu, click **Set Web Page Size.**
3. In the **Number of Rows** box, specify the maximum number of rows you want to appear on a page.

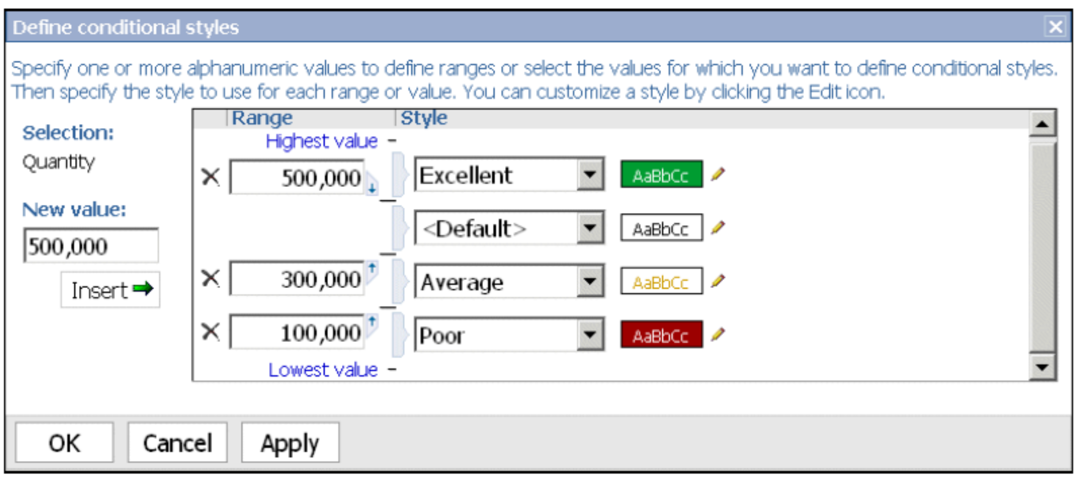
   Tip: To see row numbers in your report, click the **Show row numbers** check box.
4. Click **OK.**

Conditional Style

Steps

1. Open the **Units Sold** report.
2. Click the heading of the **Quantity** column.
3. From the **Change Layout** menu, click **Define Conditional Styles.**
4. In the **New value** box, type

   100000
5. Click **Insert** to add the value under **Range.**
6. Under **Style,** click **Poor.**
7. Repeat steps 4 to 6 to add 300000 as a value, and assign the style **Average.**
8. Repeat steps 4 to 5 to add 500000 as a value.
9. Click the arrow button next to 500000 to move the value above the threshold.
10. Assign the style **Excellent** to 500000.



11. Click **OK.**

    Values in the **Quantity** column are formatted according to the ranges you defined.
12. Click the save as button on the toolbar.

13. In the **Name** box, type

    Conditional Styles Example

14. Leave the destination folder as **Public Folders**, and click **OK**.

Product line	Quantity
Camping Equipment	866,234
Golf Equipment	99,400
Mountaineering Equipment	301,958
Outdoor Protection	557,854
Personal Accessories	389,908
Summary	**2,215,354**

Set Page Breaks

Steps

1. Open a report in Query Studio.
2. Click the report item that you want to use to insert page breaks.
3. From the **Change Layout** menu, click **Set Page Breaks**.

Tip: After you have set page breaks, view the report in PDF, Microsoft Excel 2000, or Microsoft Excel 2002 format to see the page breaks. If you view the report in HTML, it appears in a single HTML page with space separating each group or section.

Create a Simple Filter

Steps

1. Open a report in Query Studio.
2. Click the heading of the item you want to filter.
3. Click the filter button on the toolbar.

   Tip: You can also add filters to relational and dimensionally modeled relational data sources directly from the data tree without first adding the data item to the report. To do so, right-click the data item and click **Filter for report**.

   Note that if filters already exist for the item, do one of the following:

   - To edit a filter, click **Modify the existing filter**.
   - To create a new filter, click **Add a filter to** ***data item***.
   - To create a combined filter, click **Open the "Combine filters" dialog**.

4. Click the **Condition** box and choose one of the following options:
   - If you want to select items that will appear in the report, click **Show only the following.**
   - If you want to select items that will not appear in the report, click **Do not show the following (NOT).**
5. Depending on the type of data you are filtering, select the items you want from a list or specify the range of values to include.

   If you specify a range, you can specify whether to include or exclude the **From** and **To** values.

   If you are filtering text or alphanumeric values, click **Search for values** or **Type in values.**

   Note that these options will not appear unless the data source you are using supports search or type in values.

   If you are working with a dimensional data source and you are filtering a level, there may be duplicate names, such as Paris, Ontario and Paris, France.
6. If you are filtering on relational or dimensionally modeled relational data sources, choose the **Type in values** option and click the type of operation you want to perform in the **Operation** box:
   - To filter on specific values, click **Exactly Matches.**
   - To filter on values that start with specific letters or numbers, click **Starts With.**
   - To filter on values that end with specific letters or numbers, click **Ends With.**
   - To filter on values that contain a specific word or number, click **Contains.**
   - To filter on SQL patterns, click **Matches SQL Pattern.**
   - To filter on a range of values, click **Is In Range.**
7. If you filter a date range on relational or dimensionally modeled relational data sources, click the type of operation you want to perform in the **Operation** box:
   - To filter on a range between two dates, click **Range.**
   - To filter on a number of days before today, click **Last number of days**, then type a number in the **Number of days before today** box.

8. If you are filtering a measure, click one of the following options under **Apply the filter to**:
    - To filter details in the report, click **Values in the report**.
    - To filter group summaries in the report, click **Group summaries in the report**, and click the report item you want.
    - To filter on individual values in the data source, click **Individual values in the data source**.
9. If you are filtering alphanumeric values, select the **Apply the filter to individual values in the data source** check box to filter on individual values in the data source.
10. Under **Missing values**, click the option you want to use to handle missing values in the report:
    - If you want to include missing values, click **Include missing values**.
    - If you do not want to include missing values, click **Leave out missing values**.
    - If you want to only see missing values, click **Show only missing values**.

      When selected, all other options in the **Filter** dialog box are disabled.

    If set to (**Default**), missing values are left out if you defined a range filter. If you did not define a range filter, missing values are included.
11. Click **OK**.

    By default, the values of any filters applied appear as an additional subtitle.

Create a Complex Filter

Steps

1. Open the **Units Sold** report.
2. Click the **Insert Data** menu command.
3. Expand **Sales and Marketing (query)**.
4. Expand **Sales (query)**.
5. Expand **Retailer site.**
6. Drag the **Retailer country** item to the report, between **Product line** and **Quantity**.

   If you are working in the Mozilla Web browser, you cannot drag data items to the report. Double-click the item instead.

   A column that represents this item appears to the left of the **Quantity** column. You now have a report listing the quantity of units sold for every product line in all countries. However, you are interested in the quantity of units sold only for two specific product lines in two specific countries.
7. Click the heading of the **Product line** column.
8. Click the filter button on the toolbar.
9. In the **Show only the following** box, select the **Camping Equipment** and **Golf Equipment** check boxes, and then click **OK.**
10. Repeat steps 7 to 9 for the **Retailer country** column, selecting **Austria** and **China** as the countries you want.

    The **Combine filters** dialog box appears.
11. Press Shift+click to select the select line icon for both filters, click **Group**, click **Apply**, and then click **OK.**

    The filters are combined. You now have a report listing the quantity of Camping Equipment and Golf Equipment sold in Austria and China. However, you are interested only in the quantity of Camping Equipment sold in Austria and Golf Equipment in China.
12. Click the **Product line: Camping Equipment, Golf Equipment** filter, clear the **Golf Equipment** check box, and then click **OK.**
13. Click the **Retailer country: Austria, China** filter, clear the **China** check box, and then click **OK.**
14. In the report, click the **Product line** column.

14. In the report, click the **Product line** column.
15. Click the filter button above the report.
16. On the **Detail** tab of the **Combine filters** dialog box, click **Add a filter line**.
17. Select the **Golf Equipment** check box and click **OK**.
18. In the report, click the **Retailer country** column.

    On the **Detail** tab of the **Combine filters** dialog box, click **Add a filter line**.
19. Select the **China** check box and click **OK**.
20. In the **Combine filters** dialog box, press Shift+click to select the select line icon for the **Product line: Golf Equipment** and **Retailer country: China** filter lines and click **Group**.

    You combined two filters by an AND operator.
21. Click the **AND** operator beside the select icon, change it to **OR**, and click **OK**.

    You now have a report listing the quantity of Camping Equipment sold in Austria and the quantity of Golf Equipment sold in China.
22. Click the save as button on the toolbar.
23. In the **Name** box, type

    Filtered Units Sold
24. Leave the destination folder as **Public Folders**, and click **OK**.

Product line	Retailer country	Quantity
Camping Equipment	Austria	724,260
Golf Equipment	China	351,060
Summary		**1,075,320**

Turn off Automatic Summarization

Steps

1. From the **Run Report** menu, click **Advanced Options**.
2. In the **Query Options** dialog box, choose an option:
   - To turn off the automatic generation of footer summaries for measures, clear the **Automatically generate footer summaries for measures** check box.
   - To turn off the automatic suppression of duplicates and the summarization of detail values, clear the **Automatically summarize detail values, suppressing duplicates** check box.
3. Click **OK**.

Add a Calculation to a Report

Steps

1. Open the **Grouped Units Sold** report.
2. Click the heading of the **Quantity** column.
3. From the **Edit Data** menu, click **Calculate** .
4. In the **Operation type** box, click **Percentage**.
5. In the **Operation** box, click **% of total**.
6. Leave the default as **Based on the overall total**.
7. Click **Insert**.

   The calculated results appear in a new column, with the expression **% of total (Quantity)** used as the heading.

Product line	Retailer country	Quantity	% of total (Quantity)
Camping Equipment	Germany	1,547,097	5.61%
	Japan	2,031,007	7.36%
	United States	4,460,492	16.16%
Camping Equipment		**8,038,596**	**29.13%**
Golf Equipment	Germany	281,703	1.02%
	Japan	369,778	1.34%
	United States	858,351	3.11%
Golf Equipment		**1,509,832**	**5.47%**
Mountaineering Equipment	Germany	539,671	1.96%

8. Click the save as button on the toolbar.
9. In the **Name** box, type

   Calculated Column Example
10. Leave the destination folder as **Public Folders**, and click **OK**.