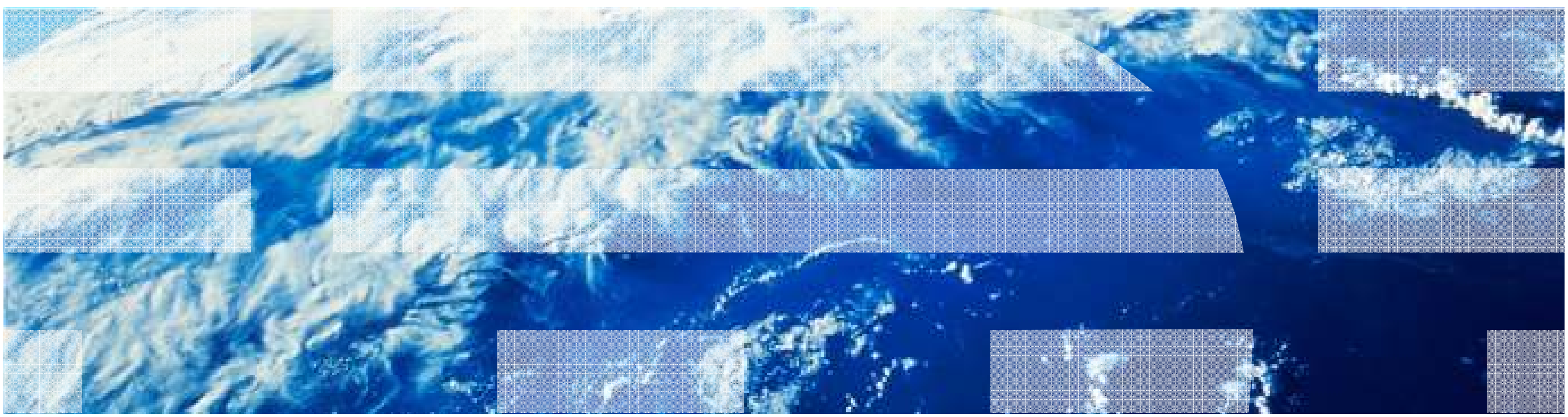
GSMRT Training Team
August 2013

GSMRT Analytics Query Studio Users Guide - External



GSMRT Analytics Query Studio introduction

- GSMRT Analytics Query uses Cognos' Query Studio. Query Studio is the tool for creating simple queries and reports in Cognos.
- There are two types of users (a summary to show the key difference between the two types of users can be found in the appendix):
  - GSMRT Analytics user
  - GSMRT Analytics Query Studio user
- GSMRT Analytics users can:
  - Run and view data for any query that has been created in your account folder and all sample or standard queries created for you by the GSMRT team
- GSMRT Analytics Query Studio users can:
  - Create reports using the Cognos Query Studio tool and save these reports for reuse.
  - Use the existing sample reports to create a new report
  - Change the appearance of reports, improve the layout of your report. For example, you can create a chart, add a title, specify text and border styles, or reorder columns for easy comparison.
  - Work with data in a report - use filters, summaries, and calculations to compare and analyze data. Drill up and drill down to view related information.
- For a more detailed user guide visit:
  - http://pic.dhe.ibm.com/infocenter/cinsight/v10r1m0/index.jsp?topic=%2Fcom.ibm.swg.ba.cognos.coginsight_relnotes.10.1.1.doc%2Fc_coginsight_relnotes_issues.html

Accessing GSMRT Analytics Query Studio

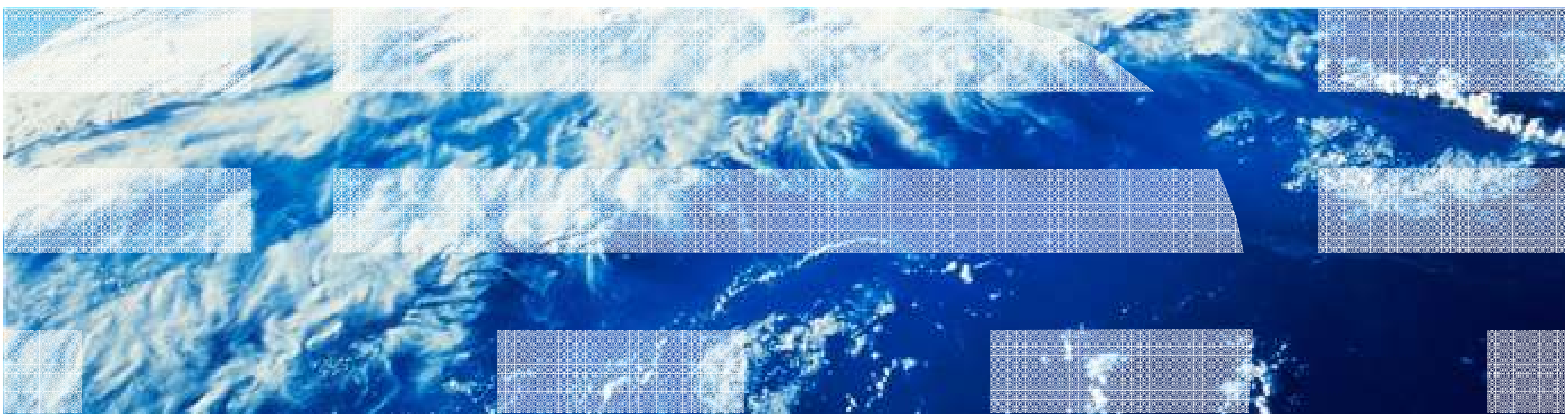
- Accessible by external clients from the GSMRT Analytics portlet on the IBM Services Connection (ISC) portal at www.ibm.com/services/connection
- Query Studio has been set up to pull data directly from the ISM replica server for accounts using any shared ISM instance (and for some accounts using dedicated ISM tools) resulting in near real-time reports. For accounts using tools other than ISM, real-time reporting is not possible unless there is a direct connection to a replica on the shared network.

Internet Explorer Browser Configuration

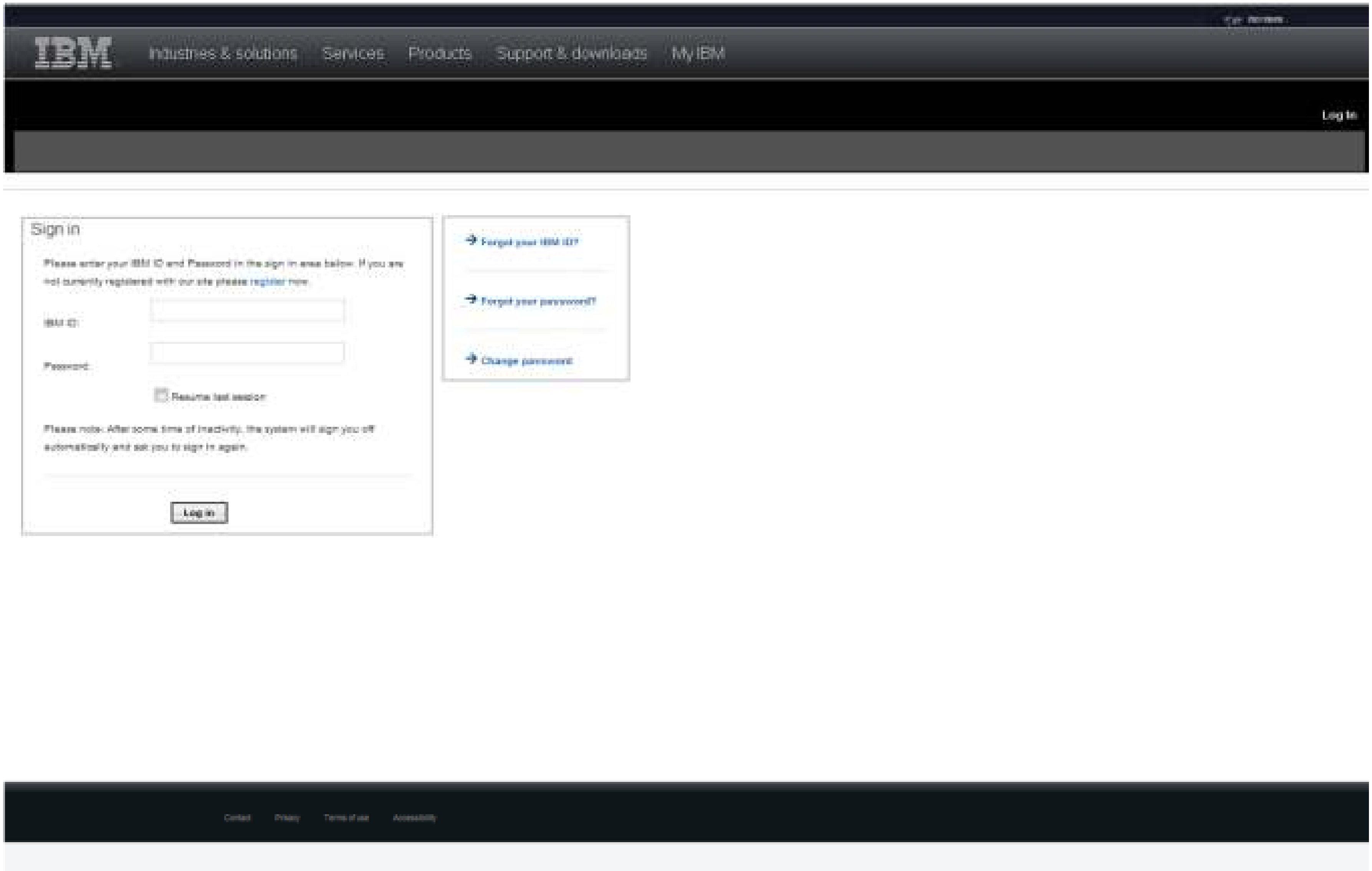
Customers using the **Internet Explorer (IE)** browser might need to adjust these browser settings to eliminate problems on the ISC portal.

1. Add the ISC Portal to your trusted sites: Tools > Internet Options > Security > Select "Trusted sites" > Sites button > add https://www-01.ibm.com to the Trusted Sites zone.
2. Enable mixed content (if not enabled): Tools > Internet Options > Security > Select "Trusted sites" > Custom level button > Miscellaneous > Display mixed content > Select "Enable“
3. Turn on "Compatibility View" (for Internet Explorer 9 or 10): For more information on Compatibility View go to http://windows.microsoft.com/en-us/internet-explorer/products/ie-9/features/compatibility-view

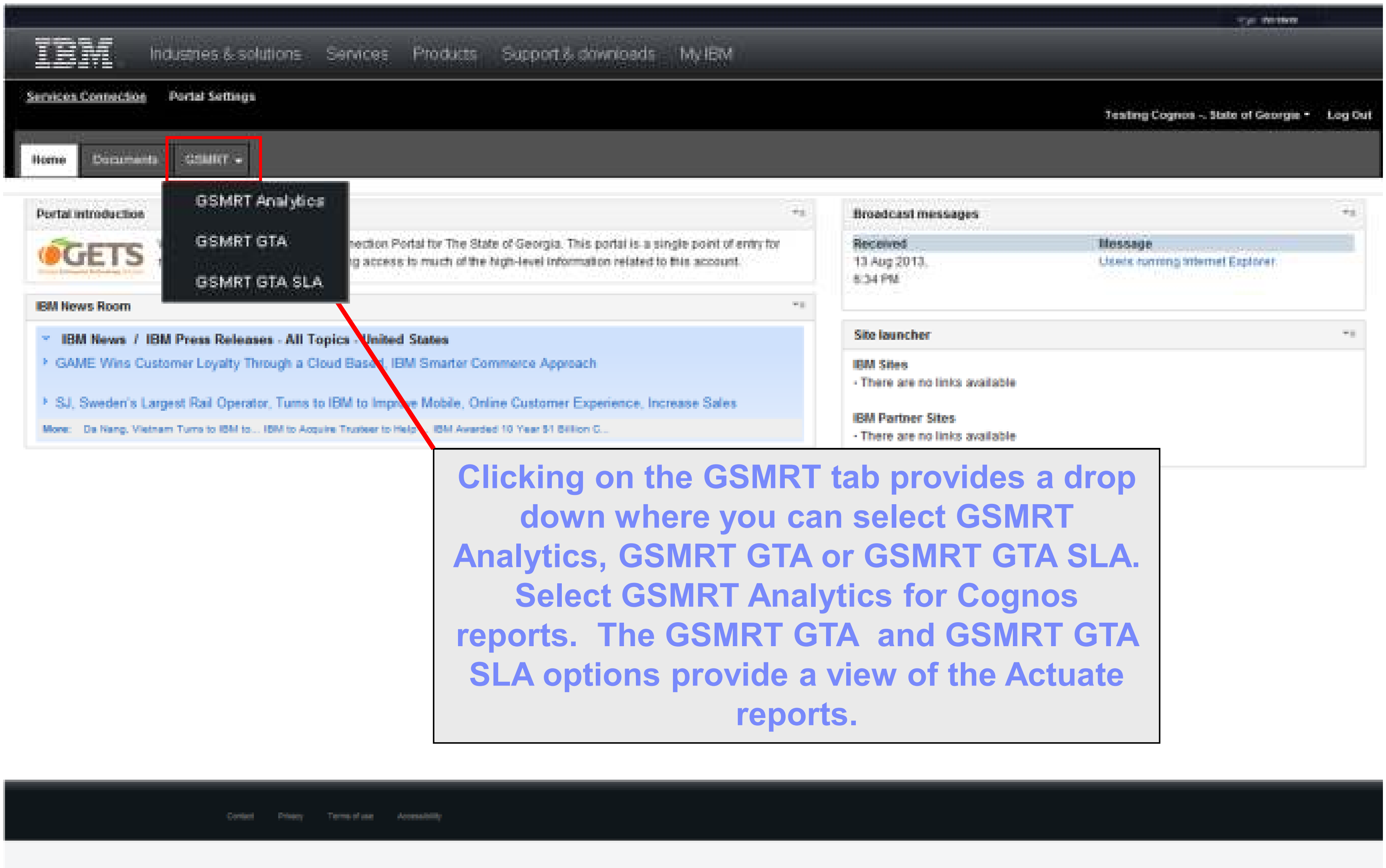
GSMRT Analytics User



IBM Services Connection portal – login screen

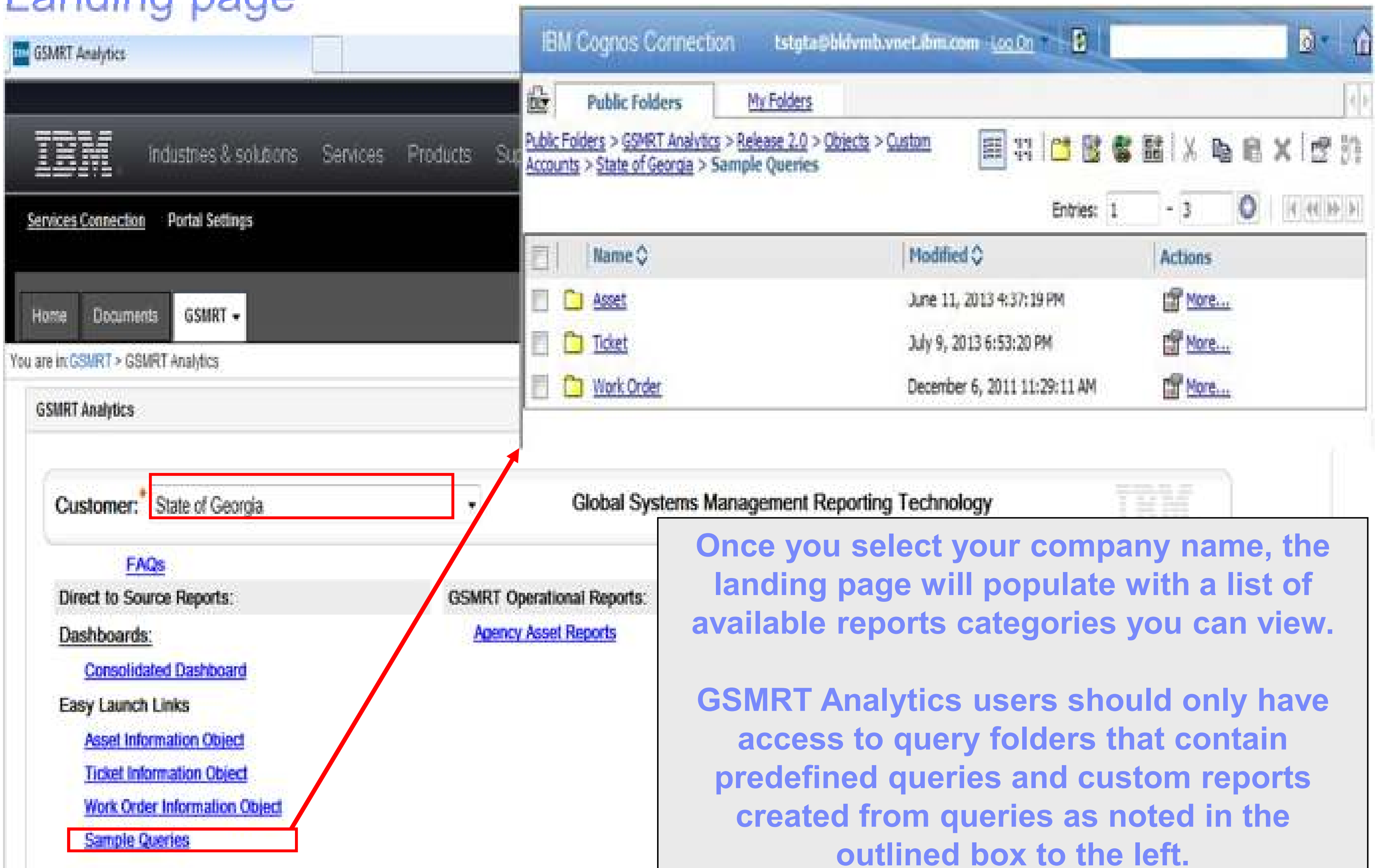


GSMRT Analytics link



Clicking on the GSMRT tab provides a drop down where you can select GSMRT Analytics, GSMRT GTA or GSMRT GTA SLA. Select GSMRT Analytics for Cognos reports. The GSMRT GTA and GSMRT GTA SLA options provide a view of the Actuate reports.

Landing page



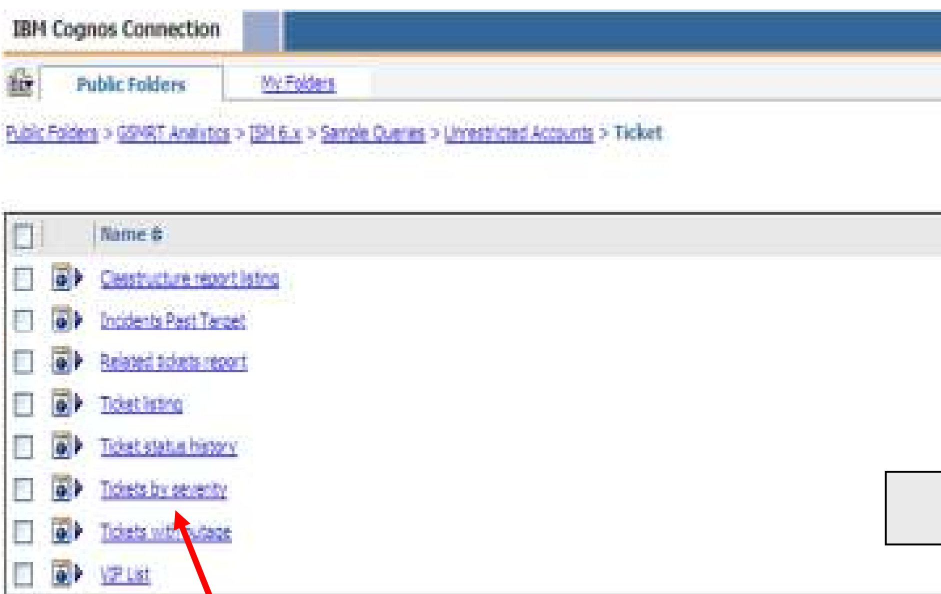
Once you select your company name, the landing page will populate with a list of available reports categories you can view.

GSMRT Analytics users should only have access to query folders that contain predefined queries and custom reports created from queries as noted in the outlined box to the left.

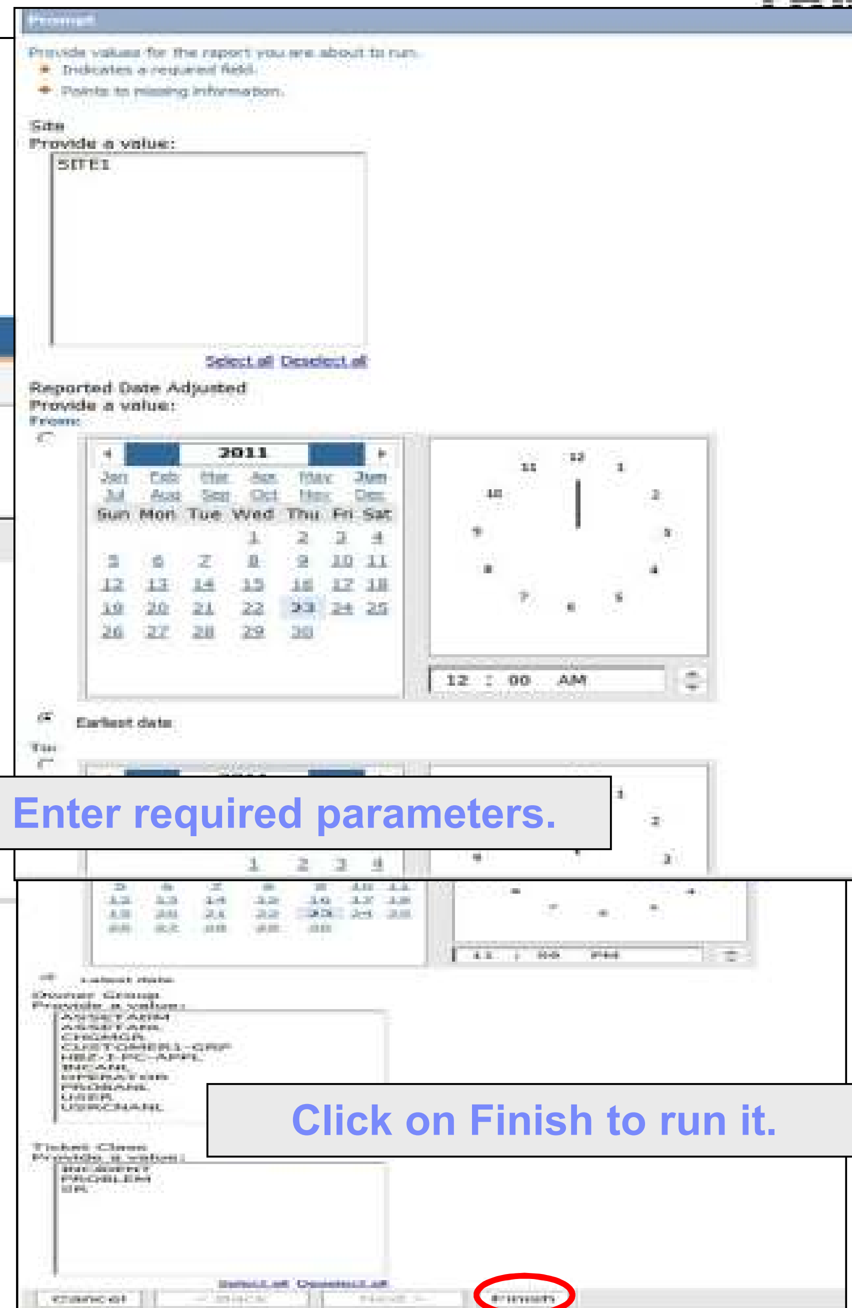
Accessing predefined sample query reports

Folders are named logically based upon the type of reports contained within them. Click on the folder you are interested in.

Sample query reports (cont'd)



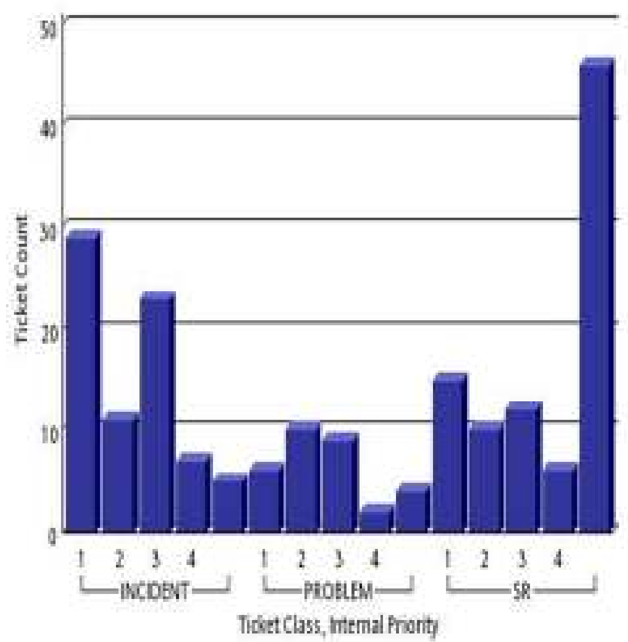
Click on a predefined query object to access it. Enter in any requested parameters and run the report.



Enter required parameters.

Click on Finish to run it.

Sample query reports (cont’d)



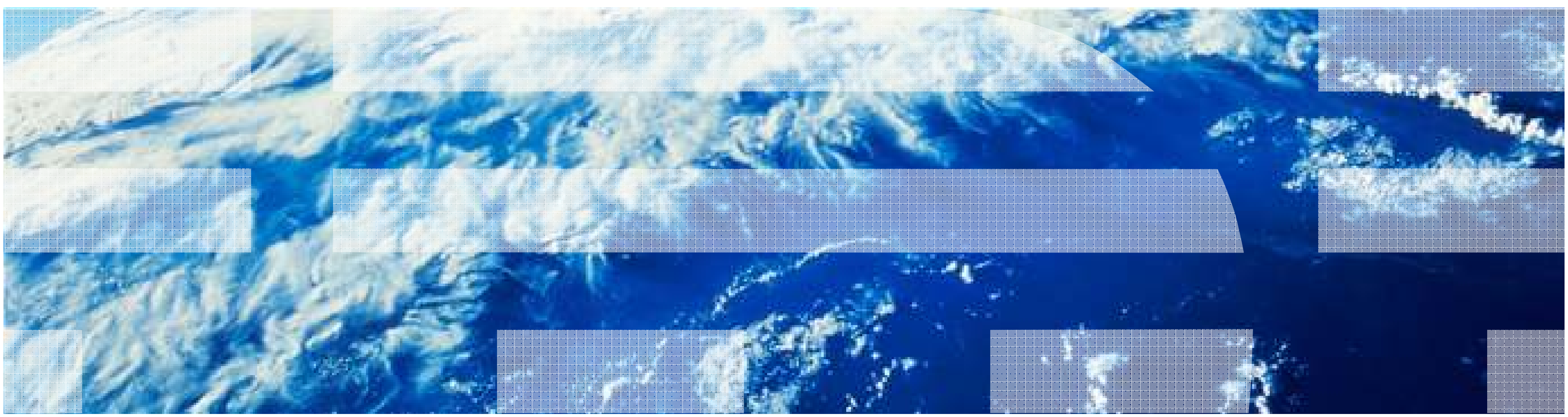
Once the report generates there are several download options available with this link.

GSMRT recommends downloading to CSV instead of Excel due to known formatting issues.

Please see the Excel Download Help slide in the appendix if you are having difficulty downloading to Excel.

IBM

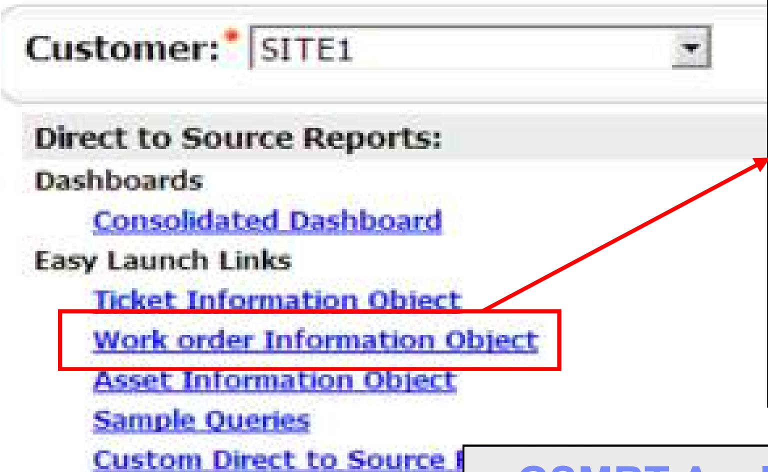
GSMRT Analytics Query Studio User

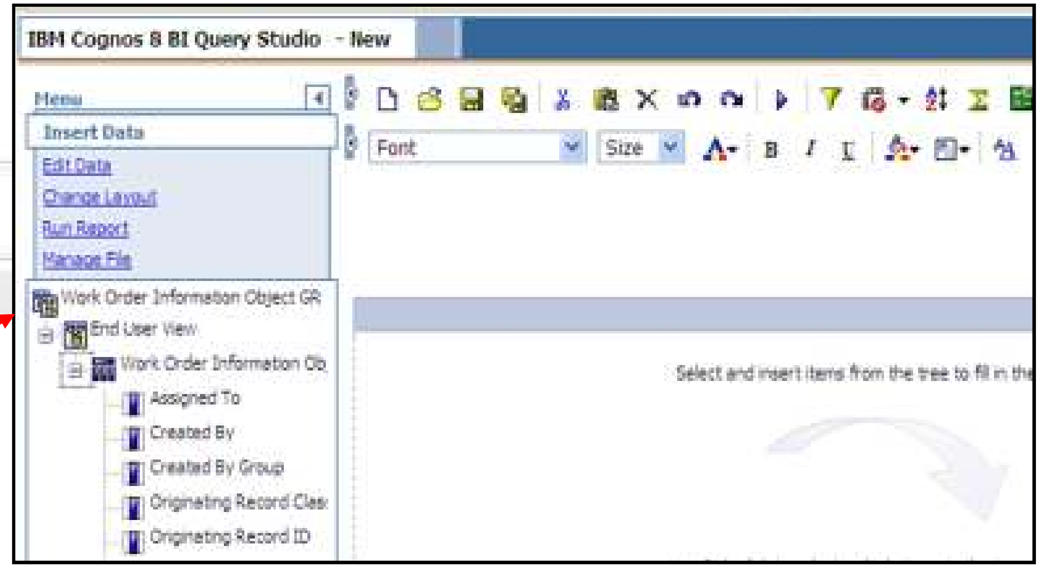


Query Studio users access

- There is only one way for the GSMRT Analytics Query Studio users to access the query tool to create reports and queries “from scratch” and that is directly from the landing page
- However, when a Query Studio user opens the Sample Queries folder and selects a sample query to view, it will open in the Query Studio view also and Query Studio users may add or delete fields from the Sample Queries and save them

Launching Query Studio from the landing page



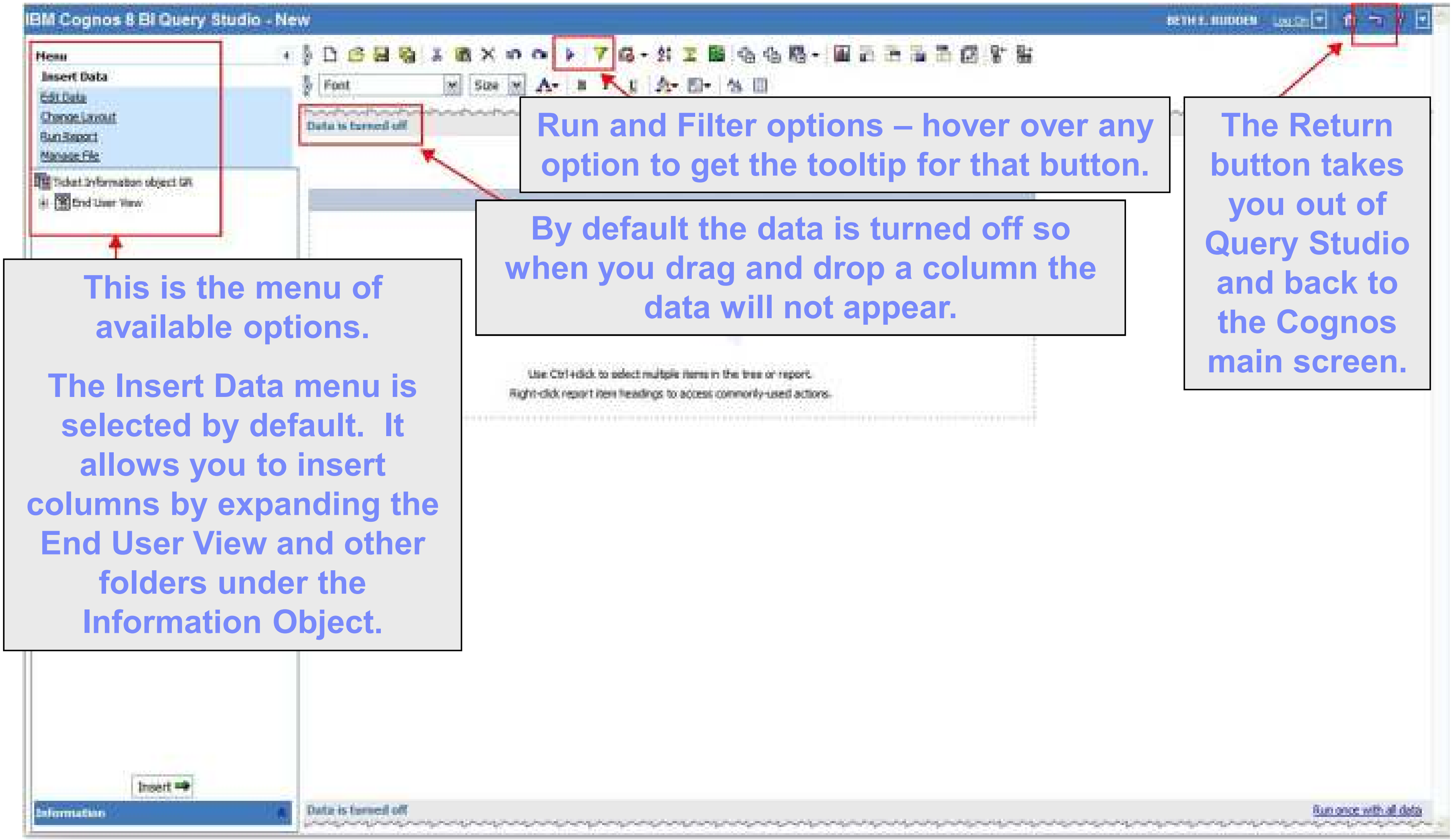


GSMRT Analytics Query Studio users will see all links that a GSMRT Analytics user sees plus any links to launch query objects directly from the landing page.

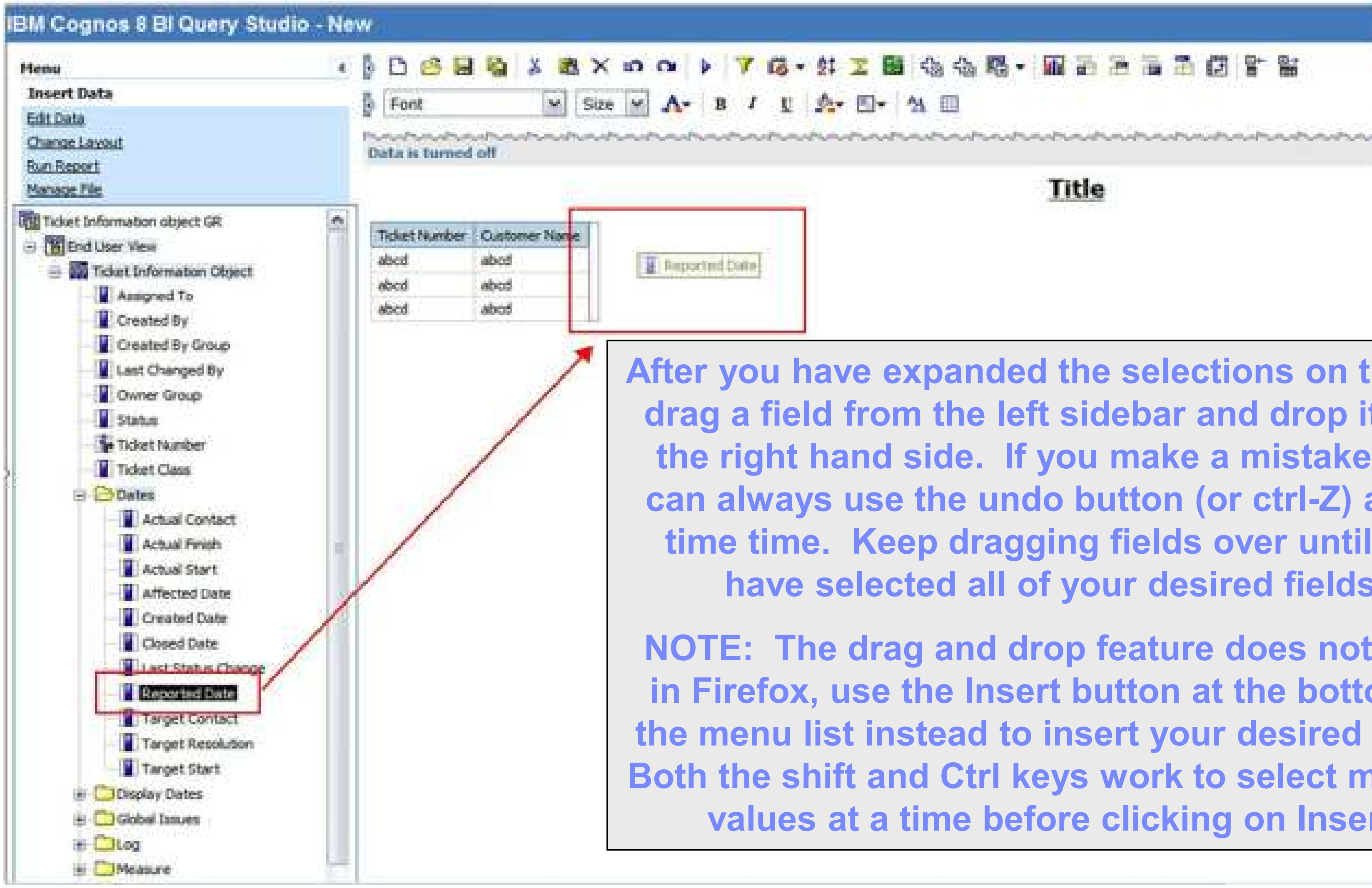
Clicking on one of the objects will take you into Query Studio.

Clicking on the Sample Queries folder and selecting a report within a folder will open the report in the Query Studio view.

Using Query Studio – basic navigation



Using Query Studio – adding columns



After you have expanded the selections on the left, drag a field from the left sidebar and drop it onto the right hand side. If you make a mistake, you can always use the undo button (or ctrl-Z) at any time time. Keep dragging fields over until you have selected all of your desired fields.

NOTE: The drag and drop feature does not work in Firefox, use the Insert button at the bottom of the menu list instead to insert your desired fields. Both the shift and Ctrl keys work to select multiple values at a time before clicking on Insert.

Filtering dos and don'ts

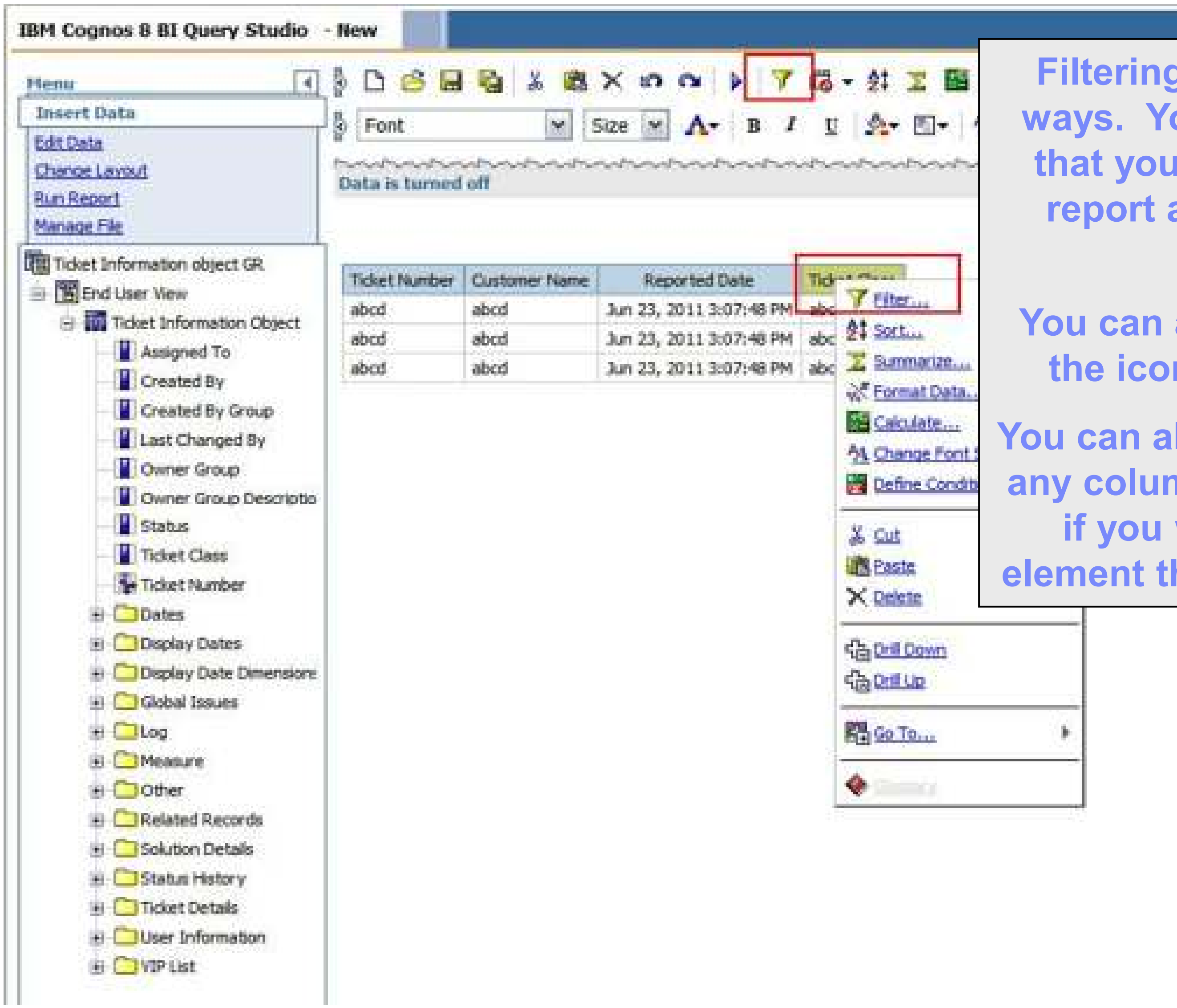
Do

- Customer filtering is automatically included in the solution. You will only see the data you have been enabled to see via the ISM or Maximo tool. If you are having issues accessing your data please check that your email address is correctly setup in ISM. See the Checking email address slide in the appendix.
- Always use the dates to filter the data. You are limited to 100k records, so filter by date accordingly.
- Try to combine as many filters as possible to narrow the result set to only the data you require at the time.

Don't

- Do not filter on any of the free text columns that come from ISM such as Summary or Details. These columns contain too much data to process a distinct list and you will receive an error.
- Do not let a query attempt to run longer than a couple minutes – you are limited to a 600 second time out. If your query runs for more than 2 minutes, you are doing something wrong or not filtering your result set. Contact your IBM reporting representative for assistance.
- Don't select more than one "unlimited" field at a time. The unlimited fields contain 20,000 characters and Query Studio is designed to only allow a single unlimited field to be selected for any report or query.

Using Query Studio – filtering the data

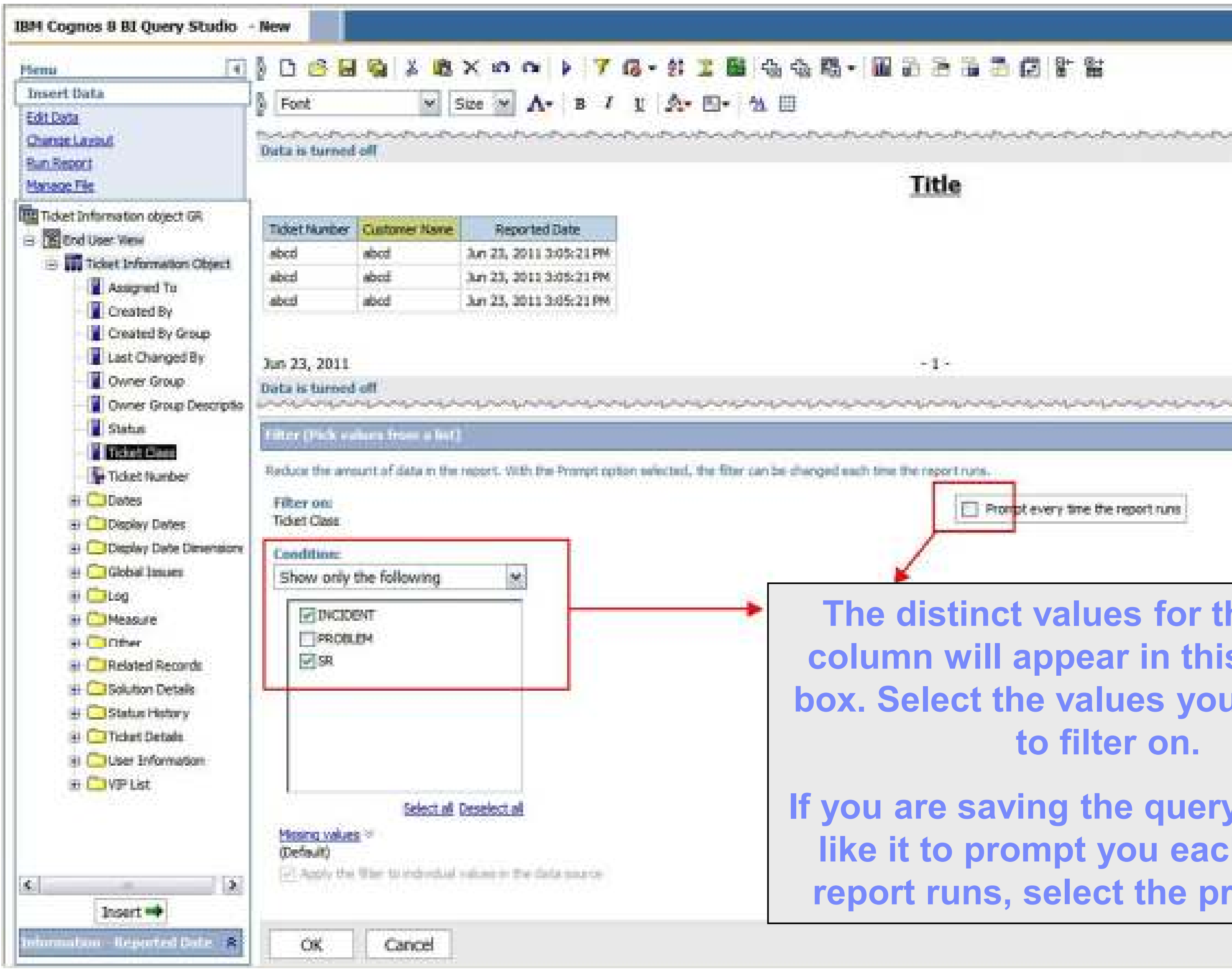


Filtering can be done in many ways. You can select a column that you have pulled into your report and right click on it to select a filter.

You can also select a filter from the icon above the columns.

You can also right-mouse click on any column on the left-hand side if you wish to filter on data element that is not in your report.

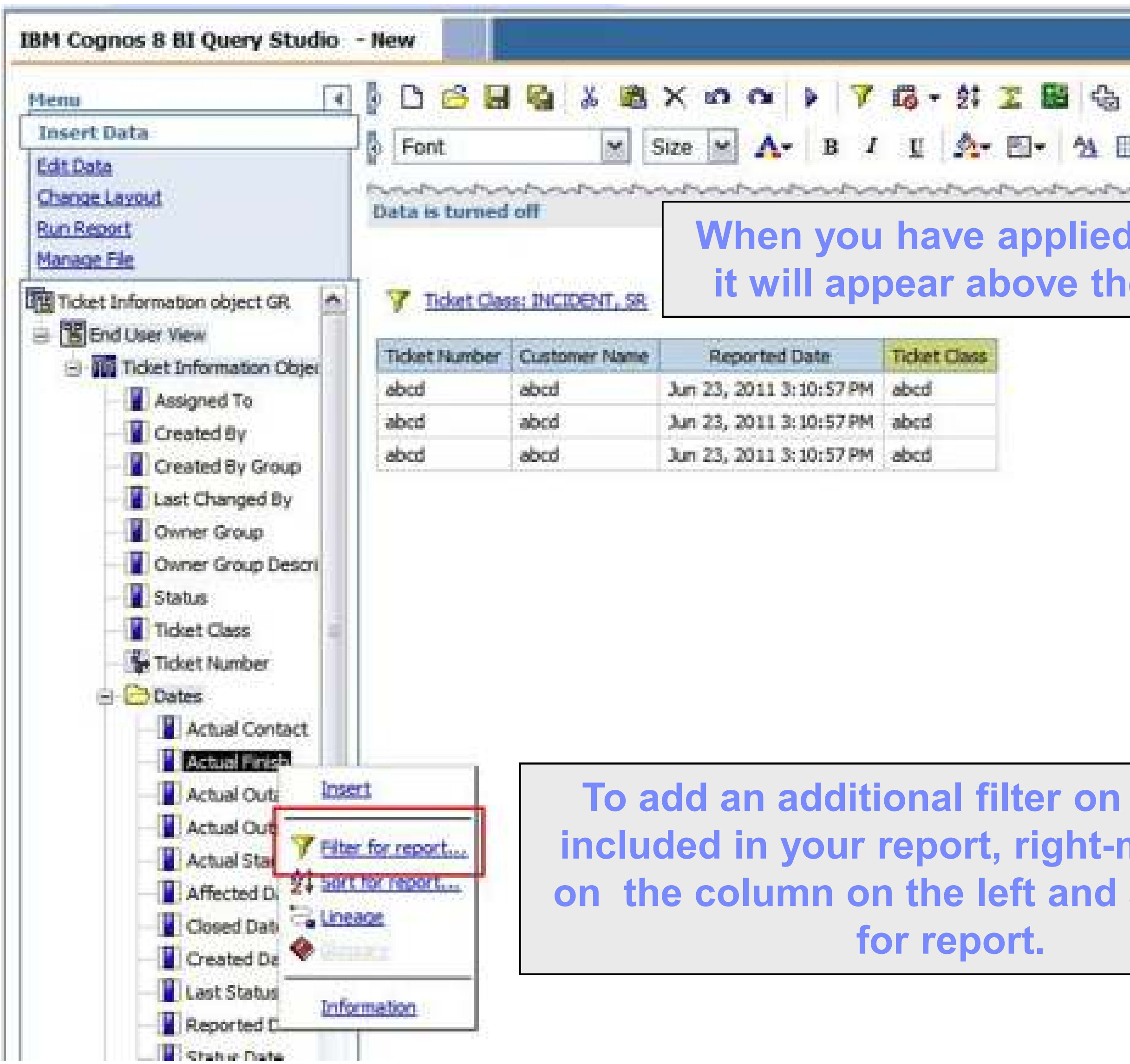
Using Query Studio – filtering the data (continued)



The distinct values for the filtered column will appear in this selection box. Select the values you would like to filter on.

If you are saving the query and would like it to prompt you each time the report runs, select the prompt box.

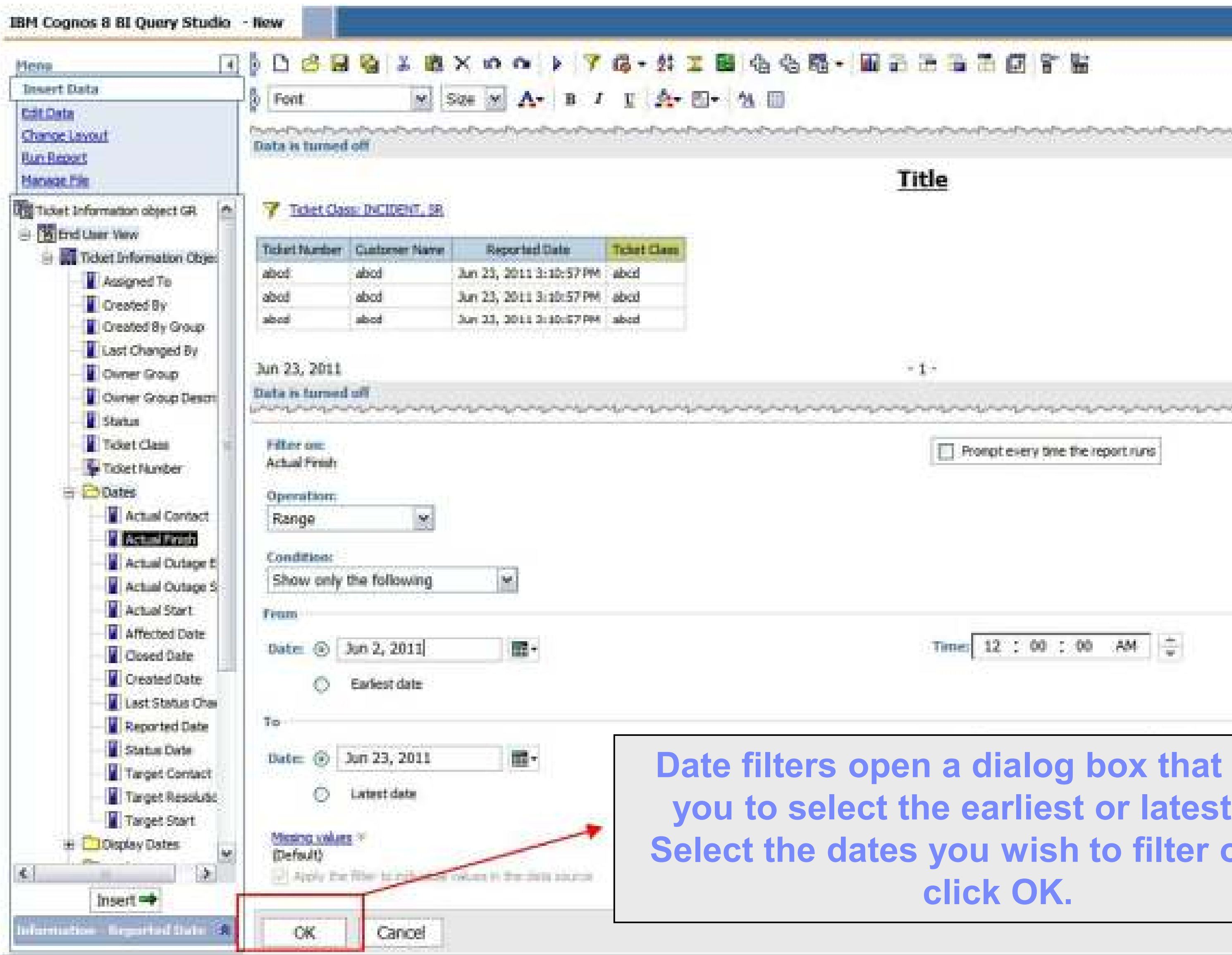
Using Query Studio – adding a secondary filter



When you have applied a filter to the report, it will appear above the selected columns.

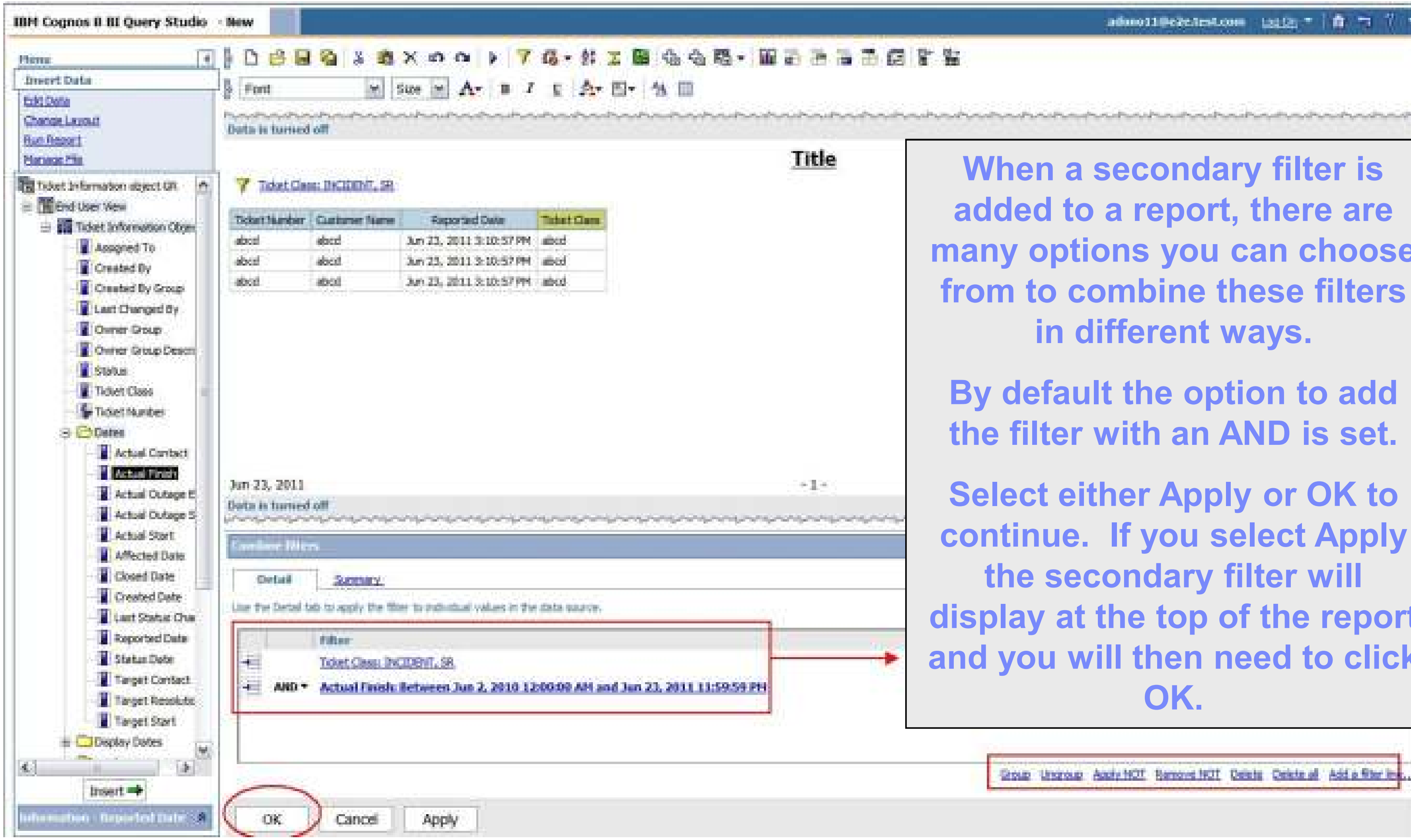
To add an additional filter on a field not included in your report, right-mouse click on the column on the left and select Filter for report.

Using Query Studio – adding a secondary filter (continued)



Date filters open a dialog box that allows you to select the earliest or latest date. Select the dates you wish to filter on then click OK.

Using Query Studio – combining the secondary filter

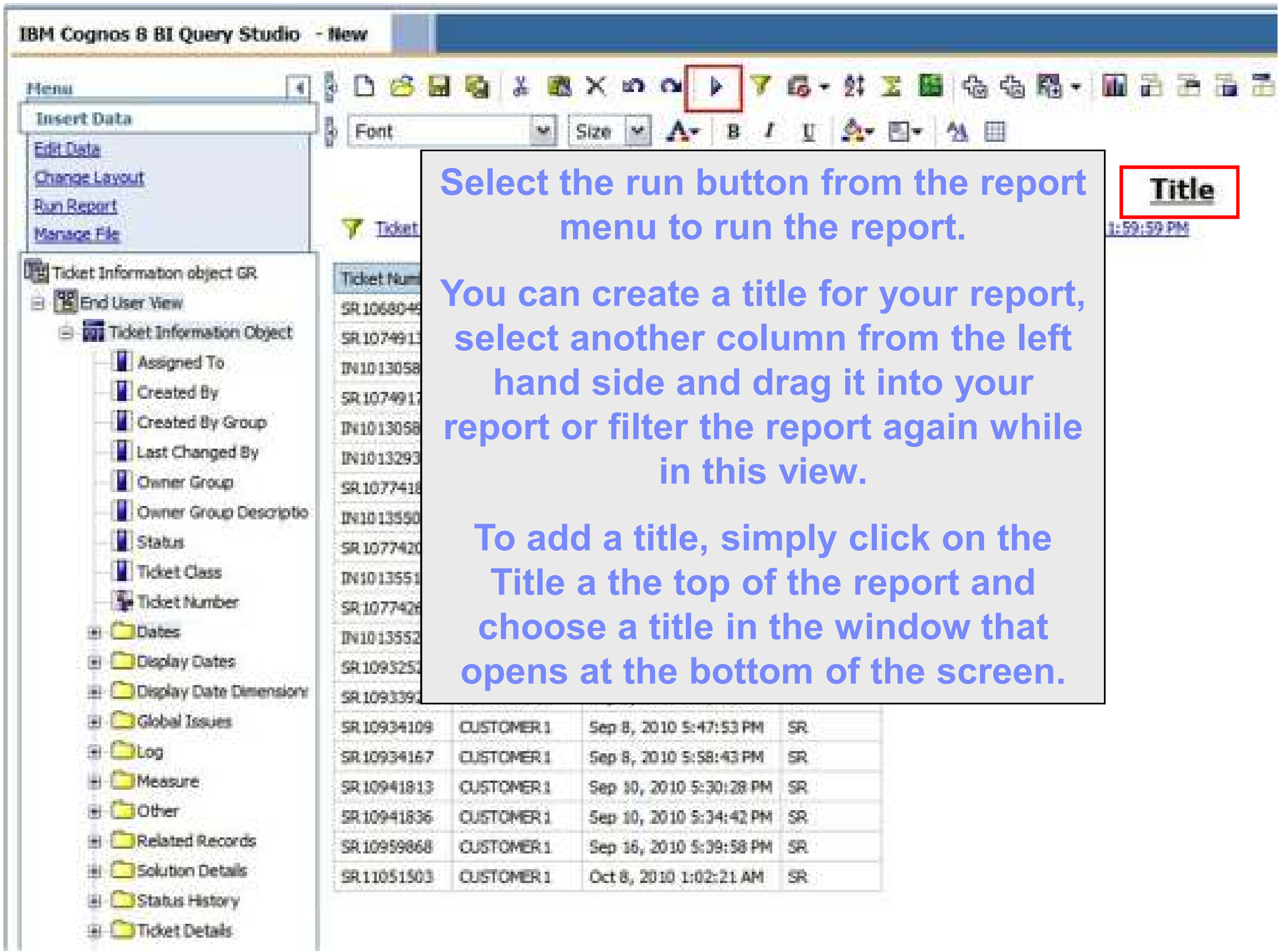


When a secondary filter is added to a report, there are many options you can choose from to combine these filters in different ways.

By default the option to add the filter with an AND is set.

Select either Apply or OK to continue. If you select Apply the secondary filter will display at the top of the report and you will then need to click OK.

Using Query Studio – running the query

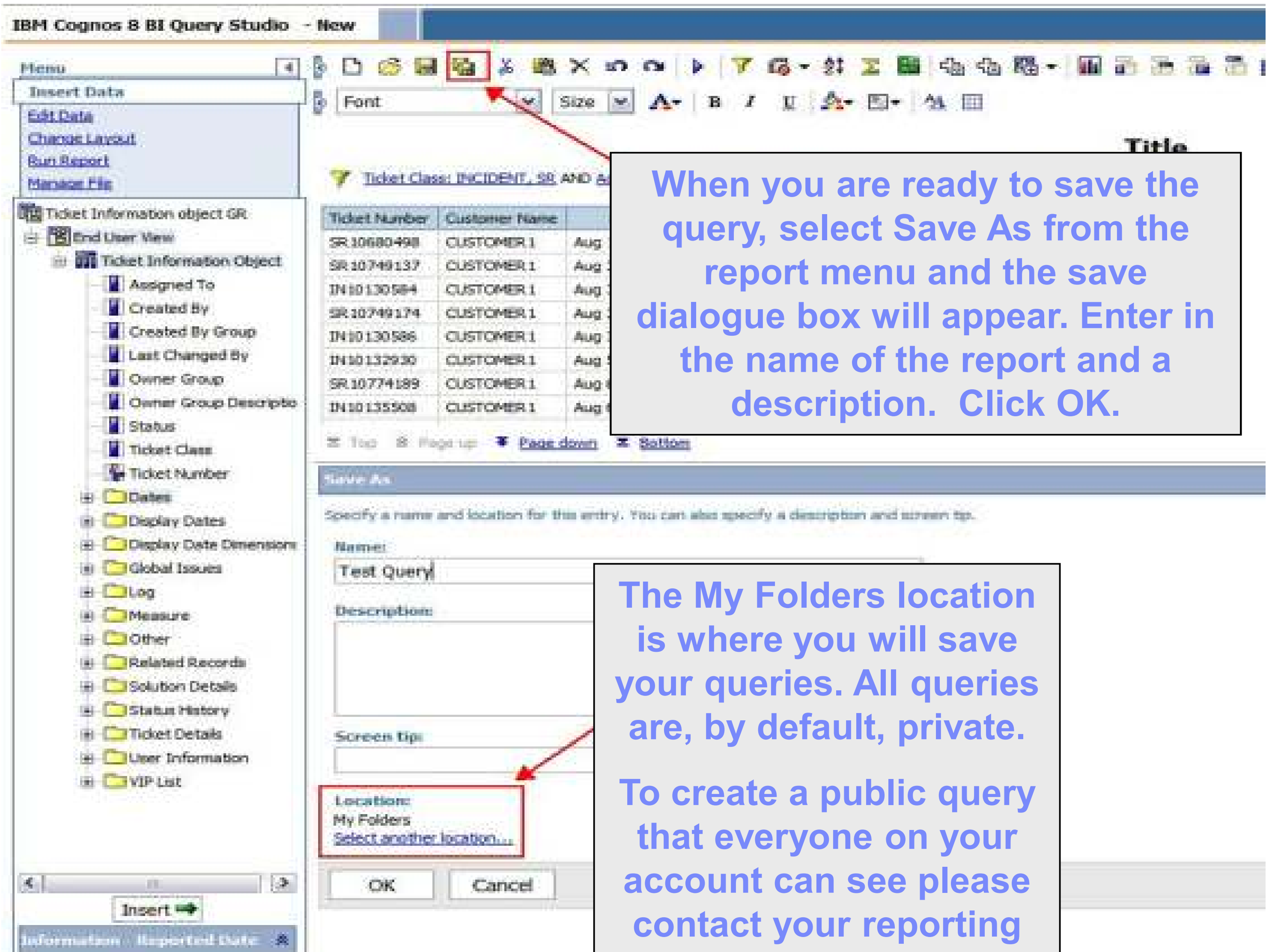


Select the run button from the report menu to run the report.

You can create a title for your report, select another column from the left hand side and drag it into your report or filter the report again while in this view.

To add a title, simply click on the Title a the top of the report and choose a title in the window that opens at the bottom of the screen.

Using Query Studio – saving the query to My Folders

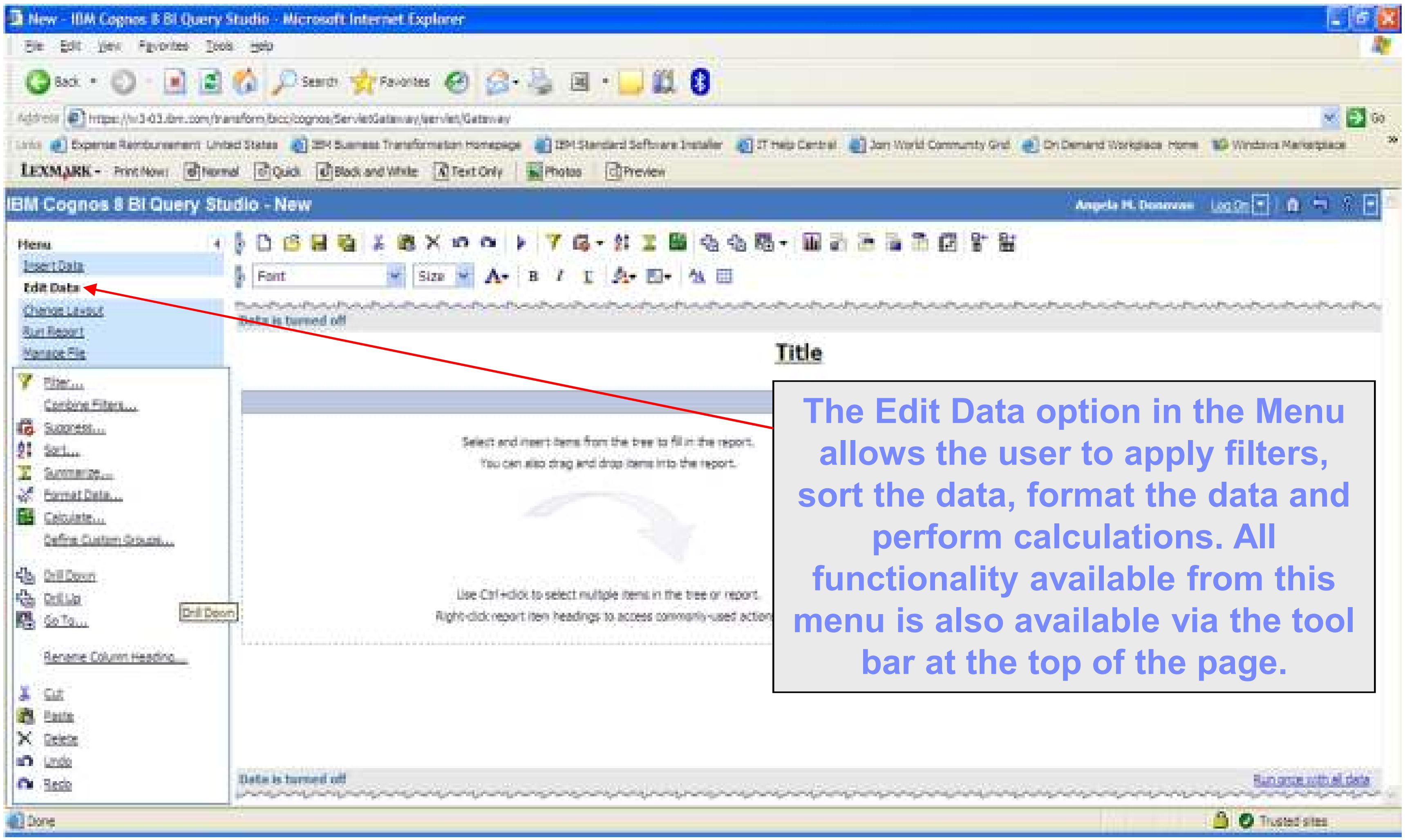


When you are ready to save the query, select Save As from the report menu and the save dialogue box will appear. Enter in the name of the report and a description. Click OK.

The My Folders location is where you will save your queries. All queries are, by default, private.

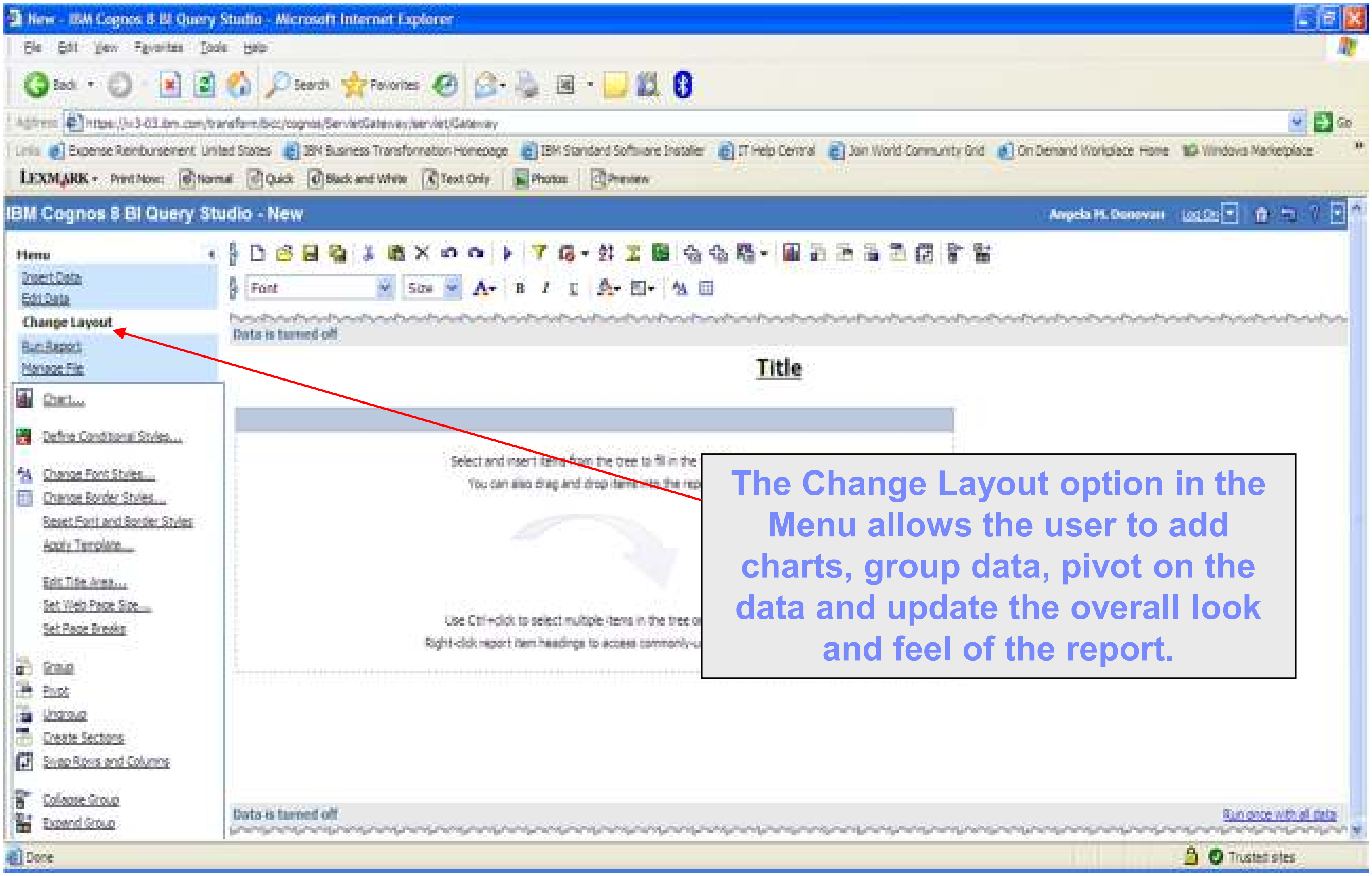
To create a public query that everyone on your account can see please contact your reporting representative.

Using Query Studio – menu option: Edit Data



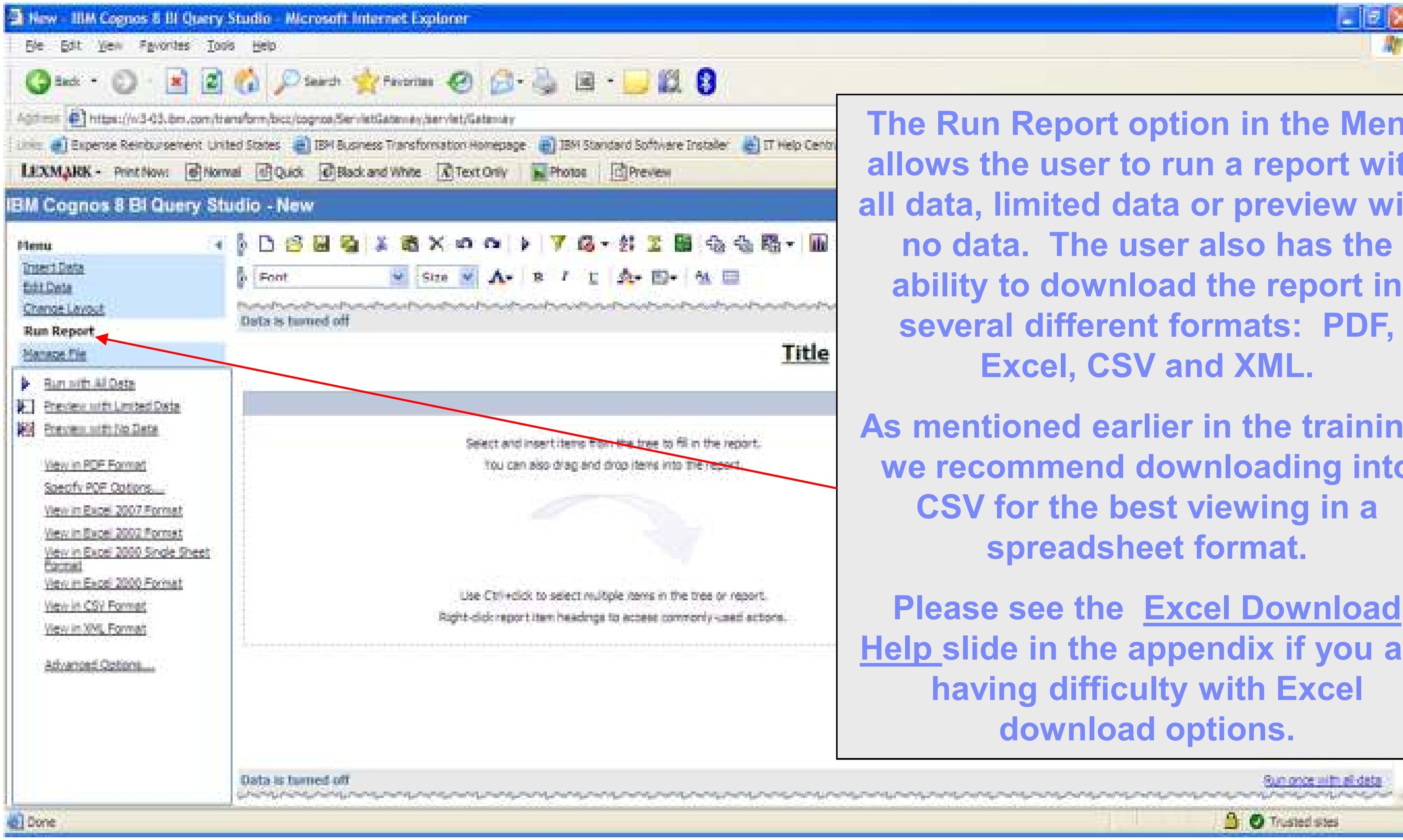
The Edit Data option in the Menu allows the user to apply filters, sort the data, format the data and perform calculations. All functionality available from this menu is also available via the tool bar at the top of the page.

Using Query Studio – menu option: Change Layout



The Change Layout option in the Menu allows the user to add charts, group data, pivot on the data and update the overall look and feel of the report.

Using Query Studio – menu option: Run Report

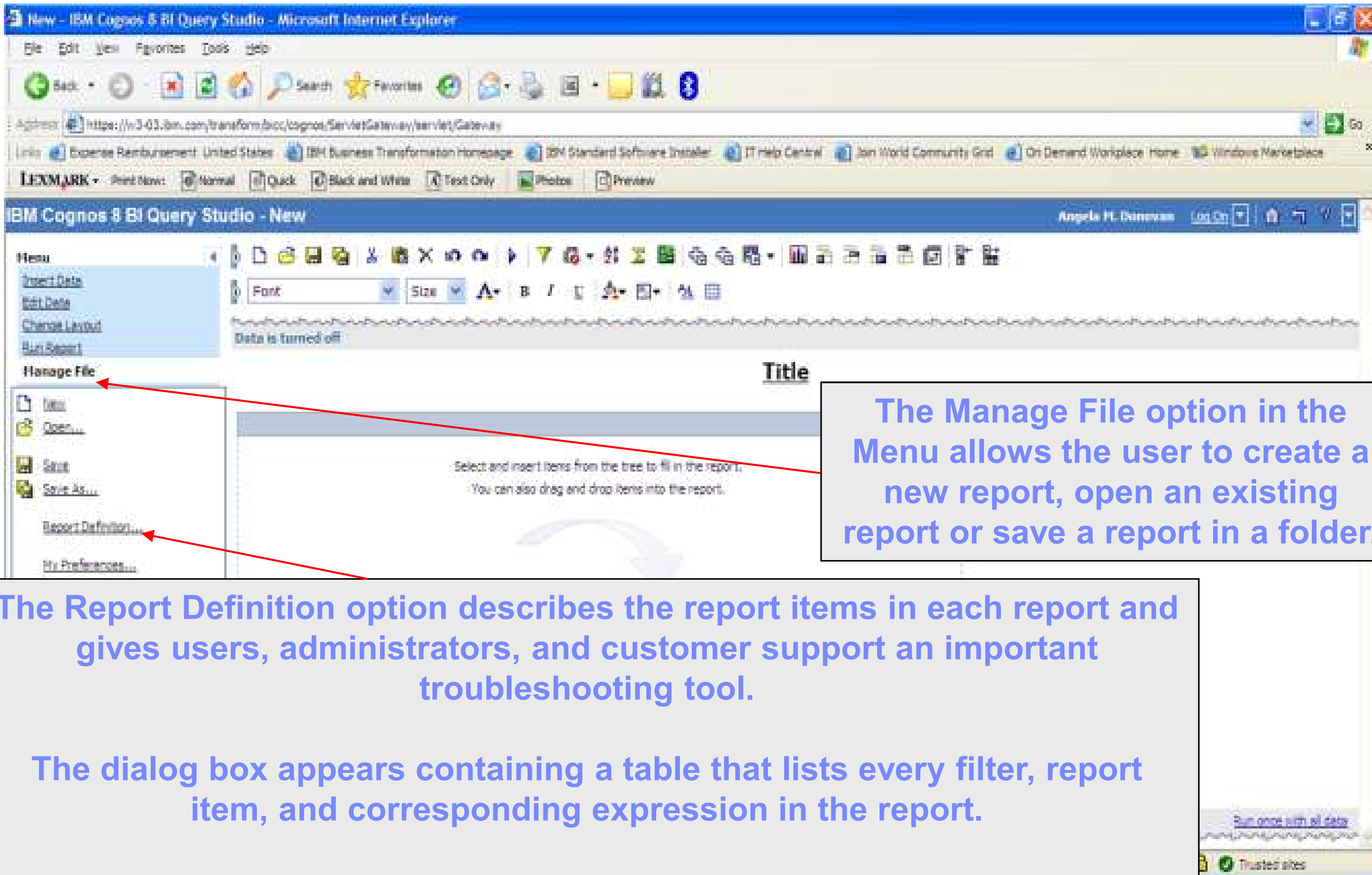


The Run Report option in the Menu allows the user to run a report with all data, limited data or preview with no data. The user also has the ability to download the report in several different formats: PDF, Excel, CSV and XML.

As mentioned earlier in the training, we recommend downloading into CSV for the best viewing in a spreadsheet format.

Please see the Excel Download Help slide in the appendix if you are having difficulty with Excel download options.

Using Query Studio – menu option: Manage File



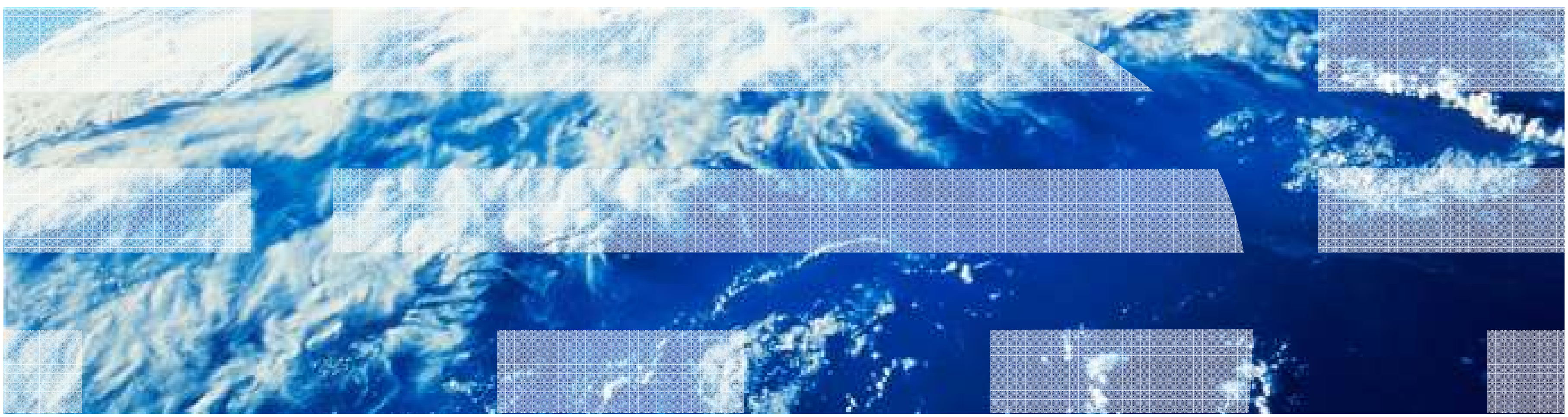
The Manage File option in the Menu allows the user to create a new report, open an existing report or save a report in a folder.

The Report Definition option describes the report items in each report and gives users, administrators, and customer support an important troubleshooting tool.

The dialog box appears containing a table that lists every filter, report item, and corresponding expression in the report.

It is typically not used by most users.

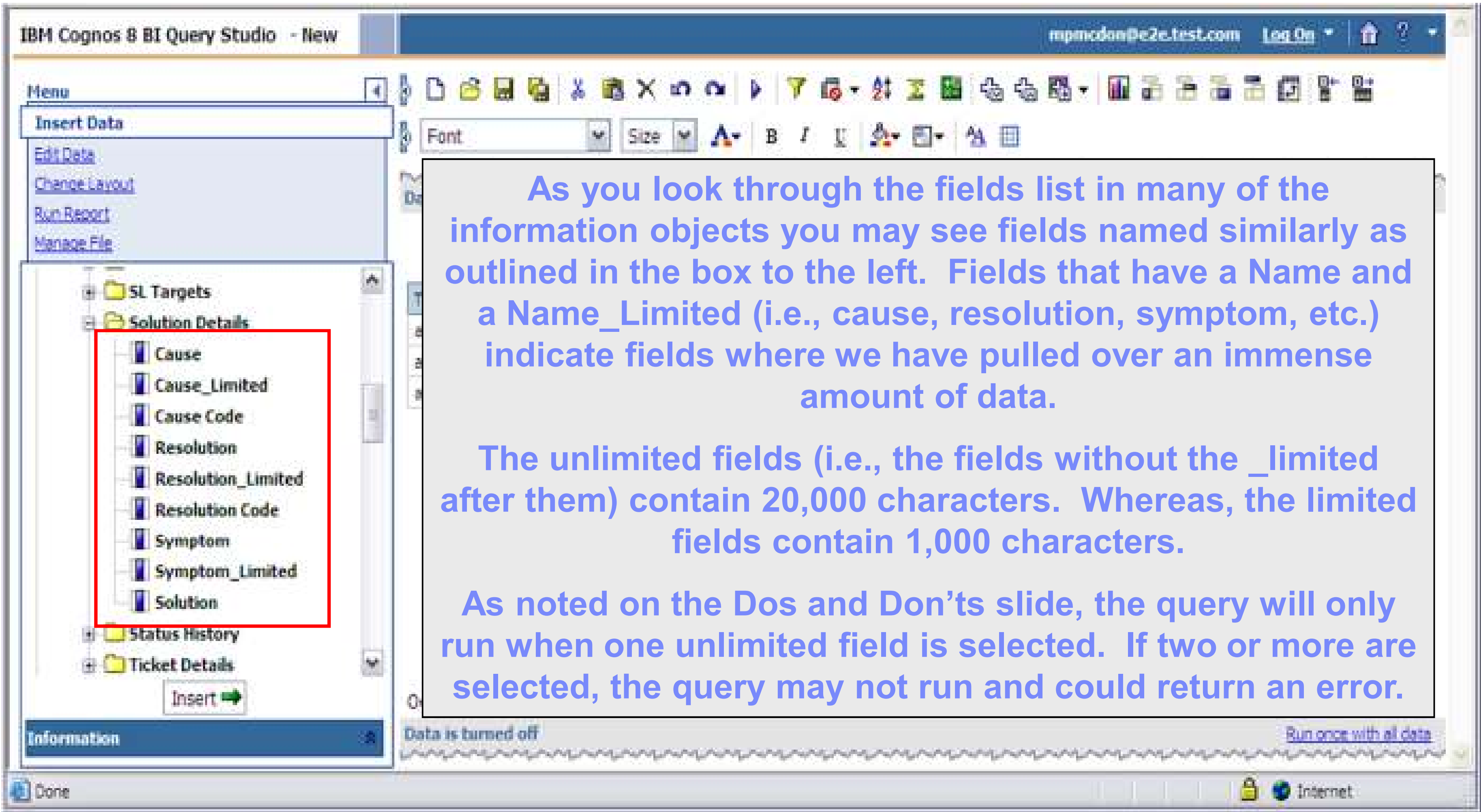
Field and Folder Information



Field and folder information

- There are some nuances in the Query Studio tool that need explanation. This section includes information about the following:
  – Limited and unlimited fields
  – Different date folders

Limited and unlimited fields

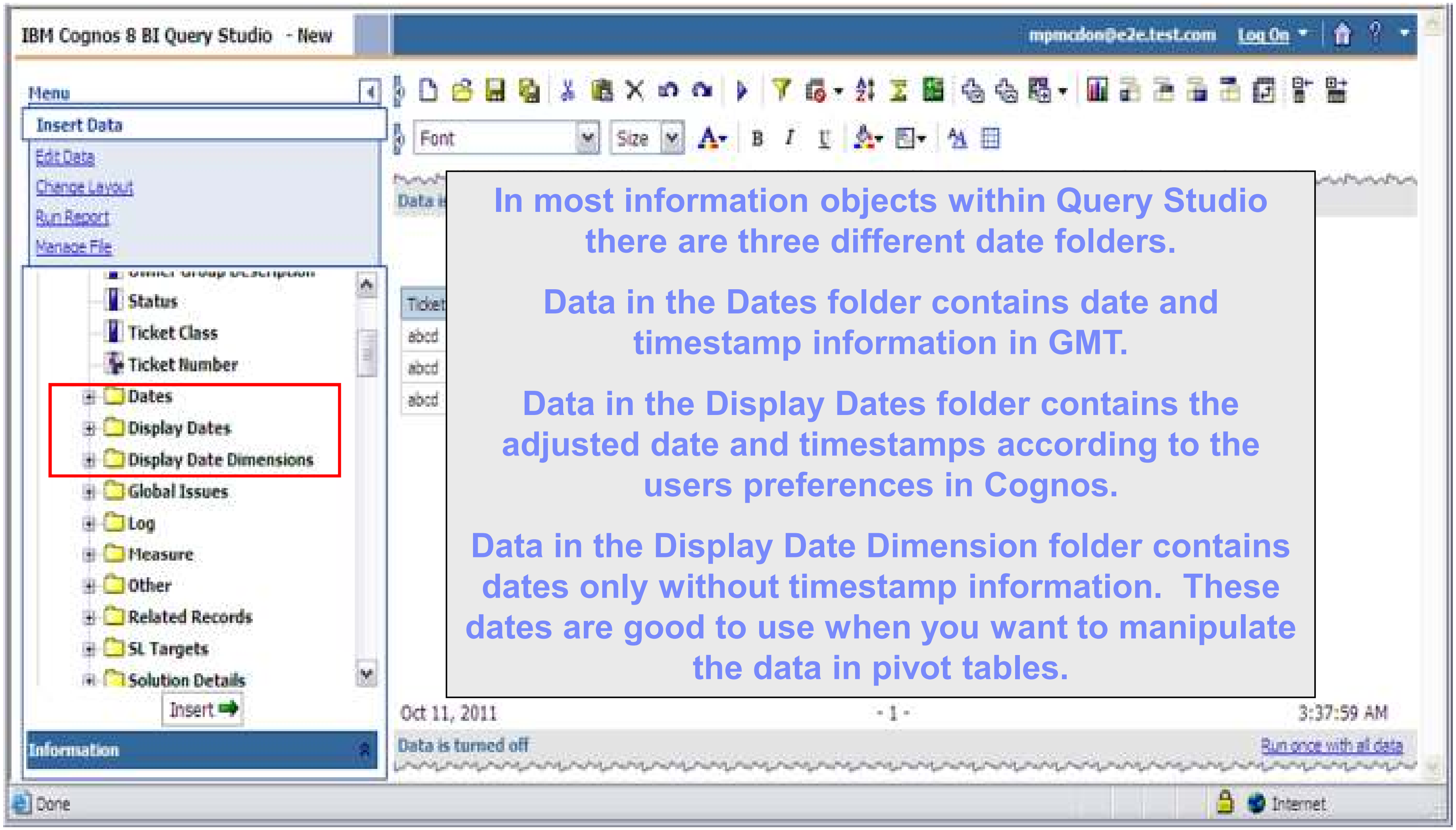


As you look through the fields list in many of the information objects you may see fields named similarly as outlined in the box to the left. Fields that have a Name and a Name_Limited (i.e., cause, resolution, symptom, etc.) indicate fields where we have pulled over an immense amount of data.

The unlimited fields (i.e., the fields without the _limited after them) contain 20,000 characters. Whereas, the limited fields contain 1,000 characters.

As noted on the Dos and Don'ts slide, the query will only run when one unlimited field is selected. If two or more are selected, the query may not run and could return an error.

Date folders



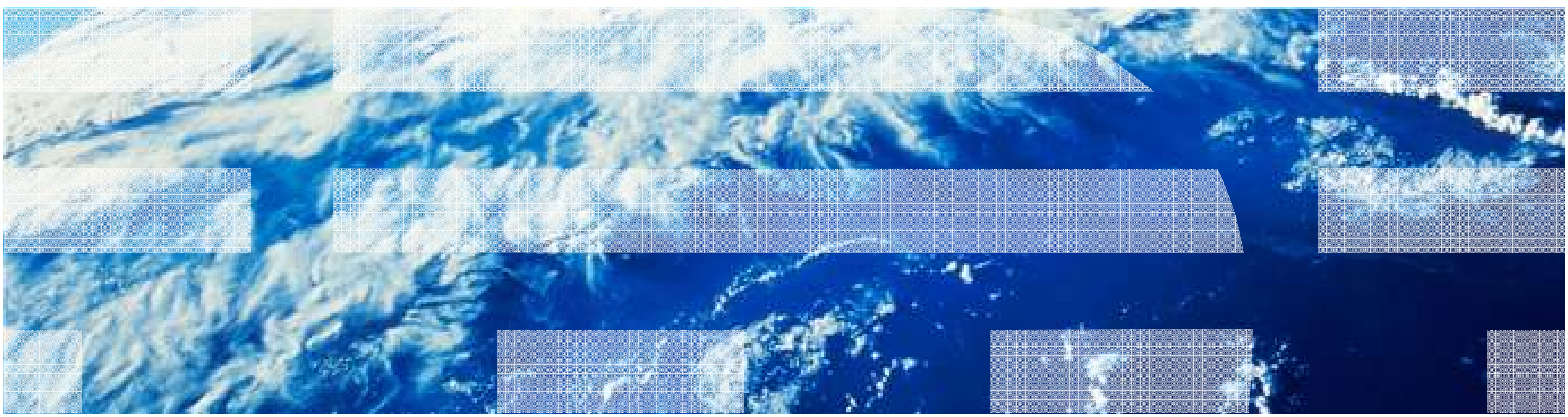
In most information objects within Query Studio there are three different date folders.

Data in the Dates folder contains date and timestamp information in GMT.

Data in the Display Dates folder contains the adjusted date and timestamps according to the users preferences in Cognos.

Data in the Display Date Dimension folder contains dates only without timestamp information. These dates are good to use when you want to manipulate the data in pivot tables.

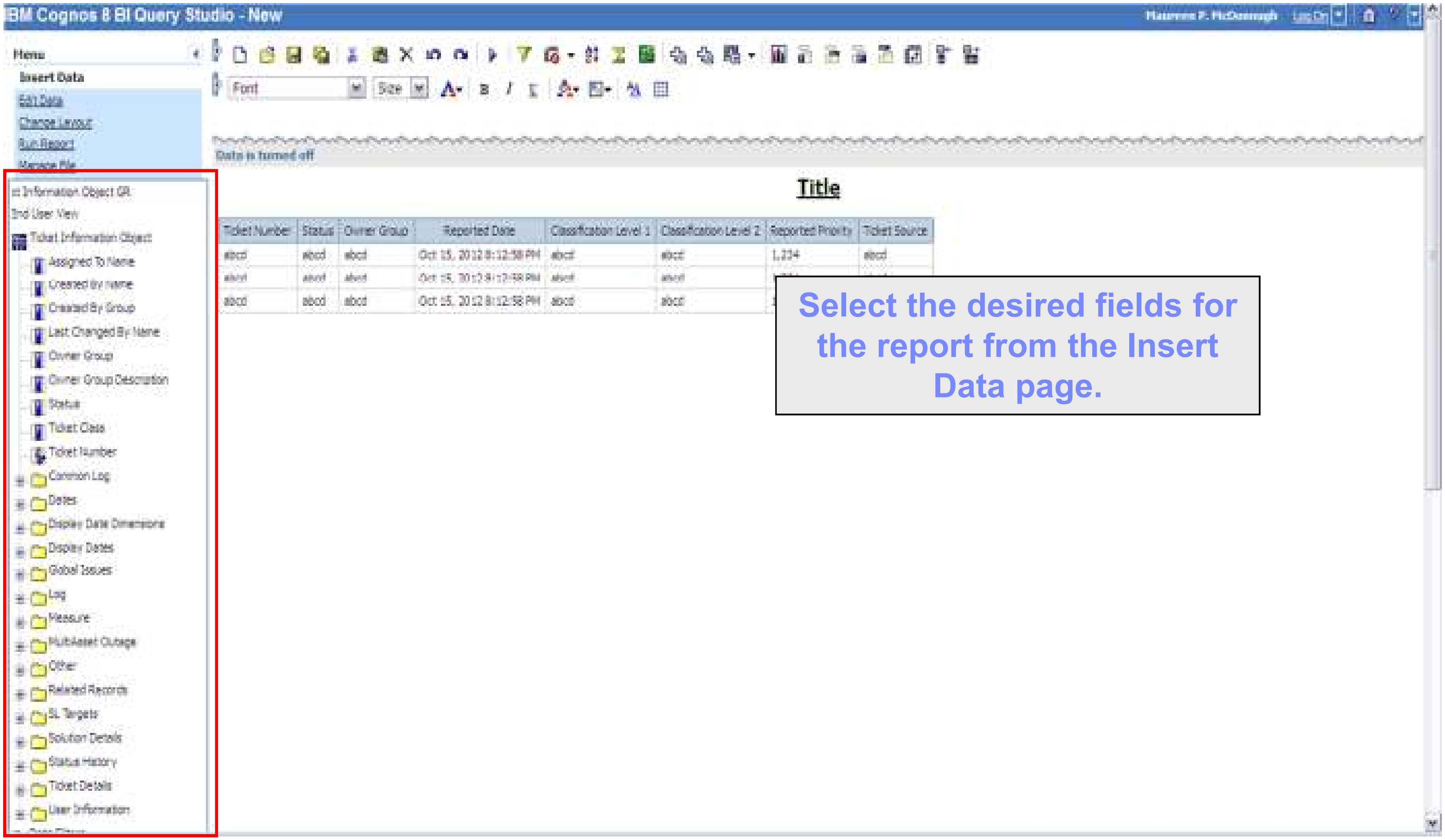
Special date filter functionality



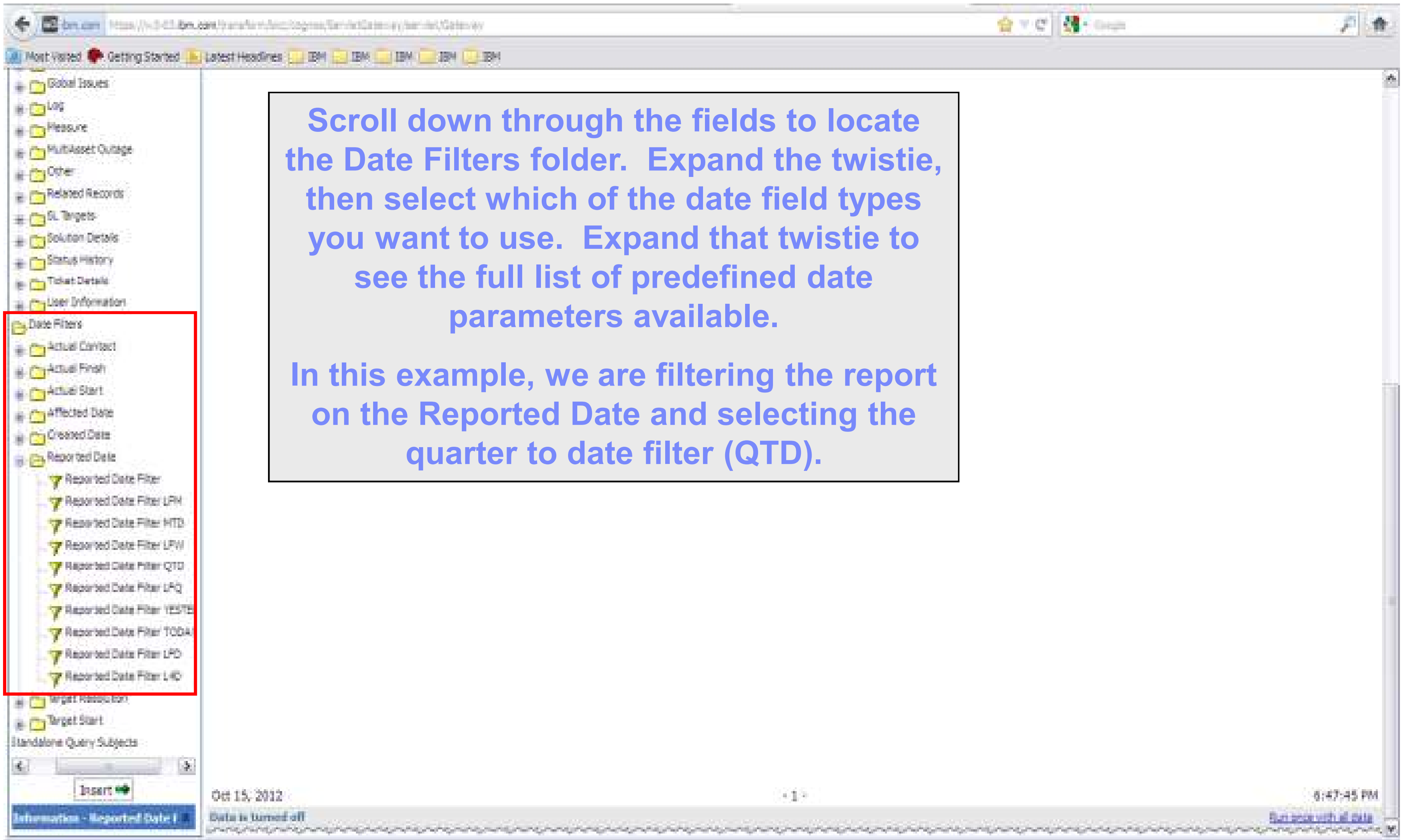
Special date filtering

- GSMRT has built in a robust date filtering option to allow the end user to schedule reports for common date ranges such as last full month and month to date
- The options currently available are:
  - LFM – last full month
  - MTD – month to date
  - LFW – last full week
  - QTD – quarter to date
  - LFQ – last full quarter
  - YESTERDAY
  - TODAY
  - LFD – last full day
  - L4D – last four days
- The following slides show where they are located and how to use them

Select fields



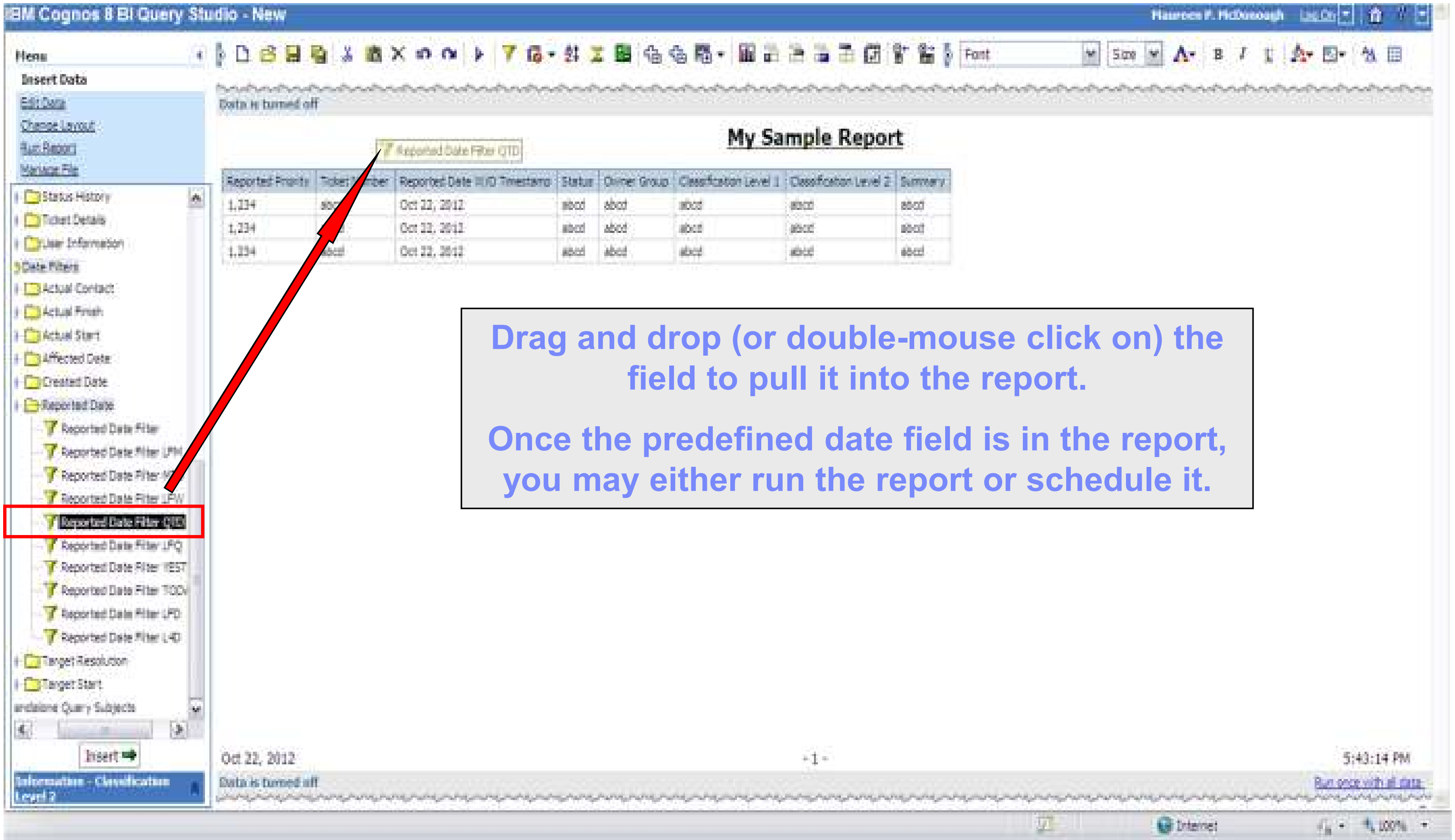
Date filters folders



Scroll down through the fields to locate the Date Filters folder. Expand the twistie, then select which of the date field types you want to use. Expand that twistie to see the full list of predefined date parameters available.

In this example, we are filtering the report on the Reported Date and selecting the quarter to date filter (QTD).

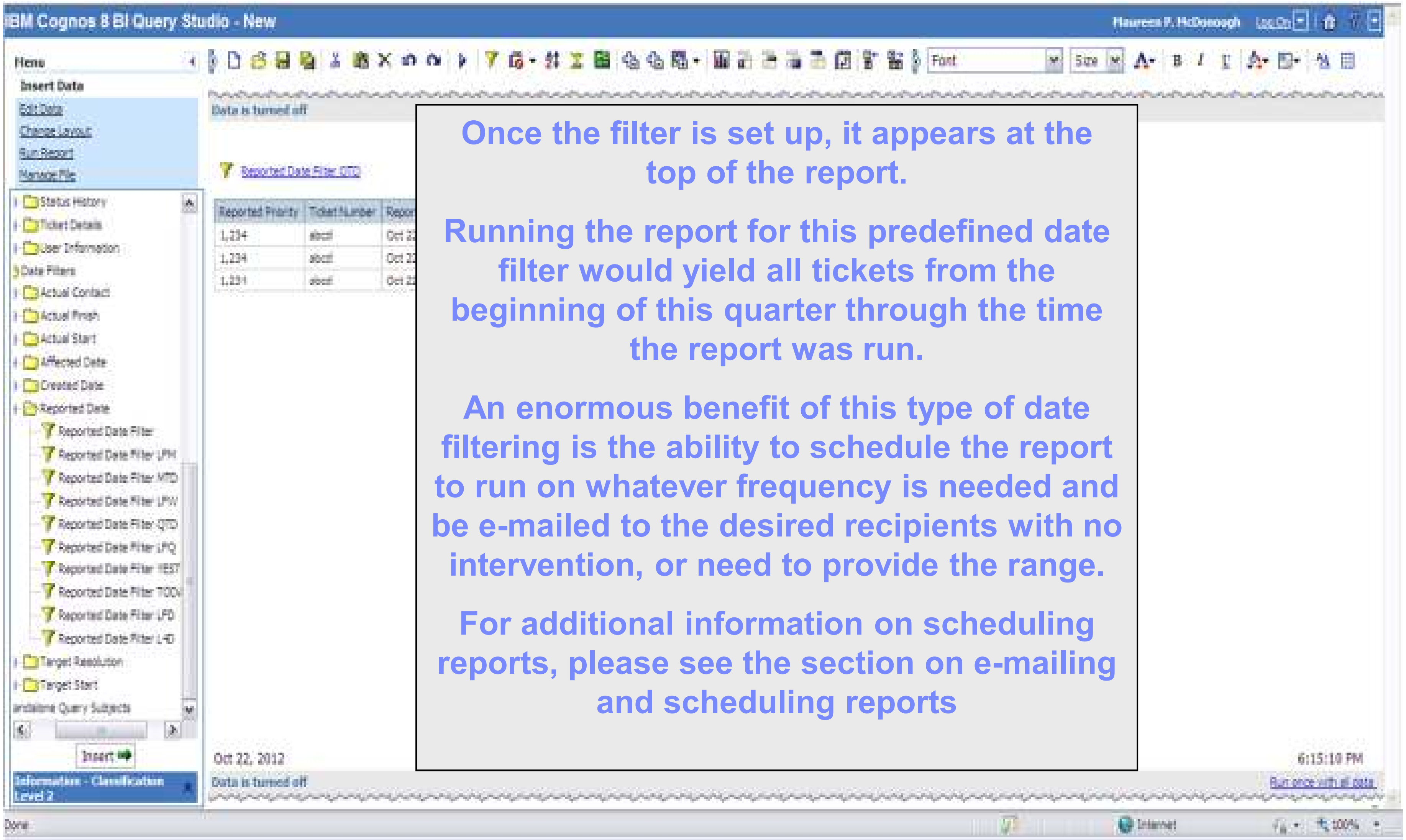
Filter in the report



Drag and drop (or double-mouse click on) the field to pull it into the report.

Once the predefined date field is in the report, you may either run the report or schedule it.

Displayed predefined filter



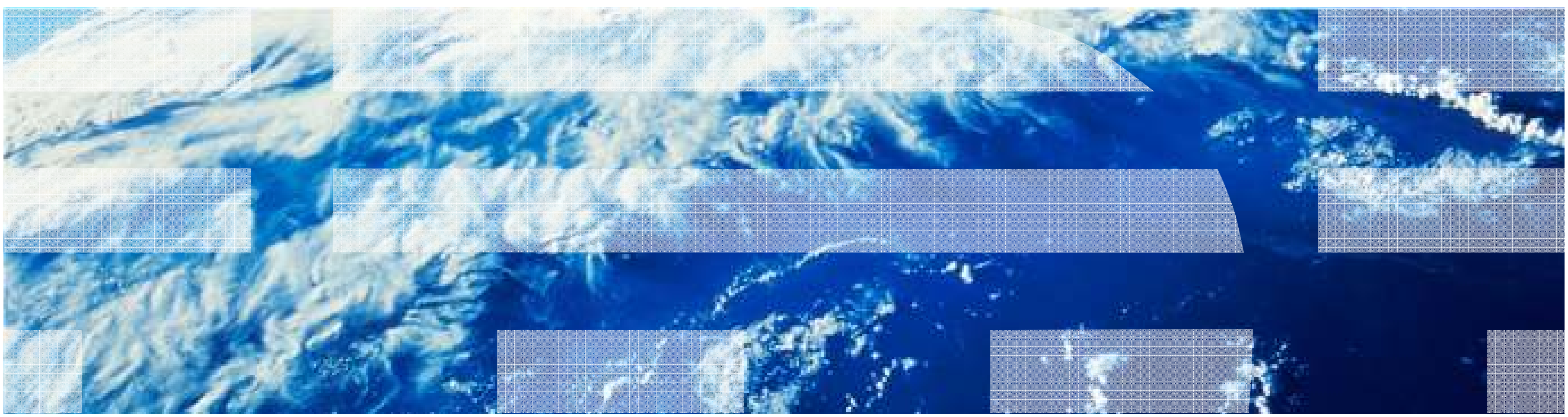
Once the filter is set up, it appears at the top of the report.

Running the report for this predefined date filter would yield all tickets from the beginning of this quarter through the time the report was run.

An enormous benefit of this type of date filtering is the ability to schedule the report to run on whatever frequency is needed and be e-mailed to the desired recipients with no intervention, or need to provide the range.

For additional information on scheduling reports, please see the section on e-mailing and scheduling reports

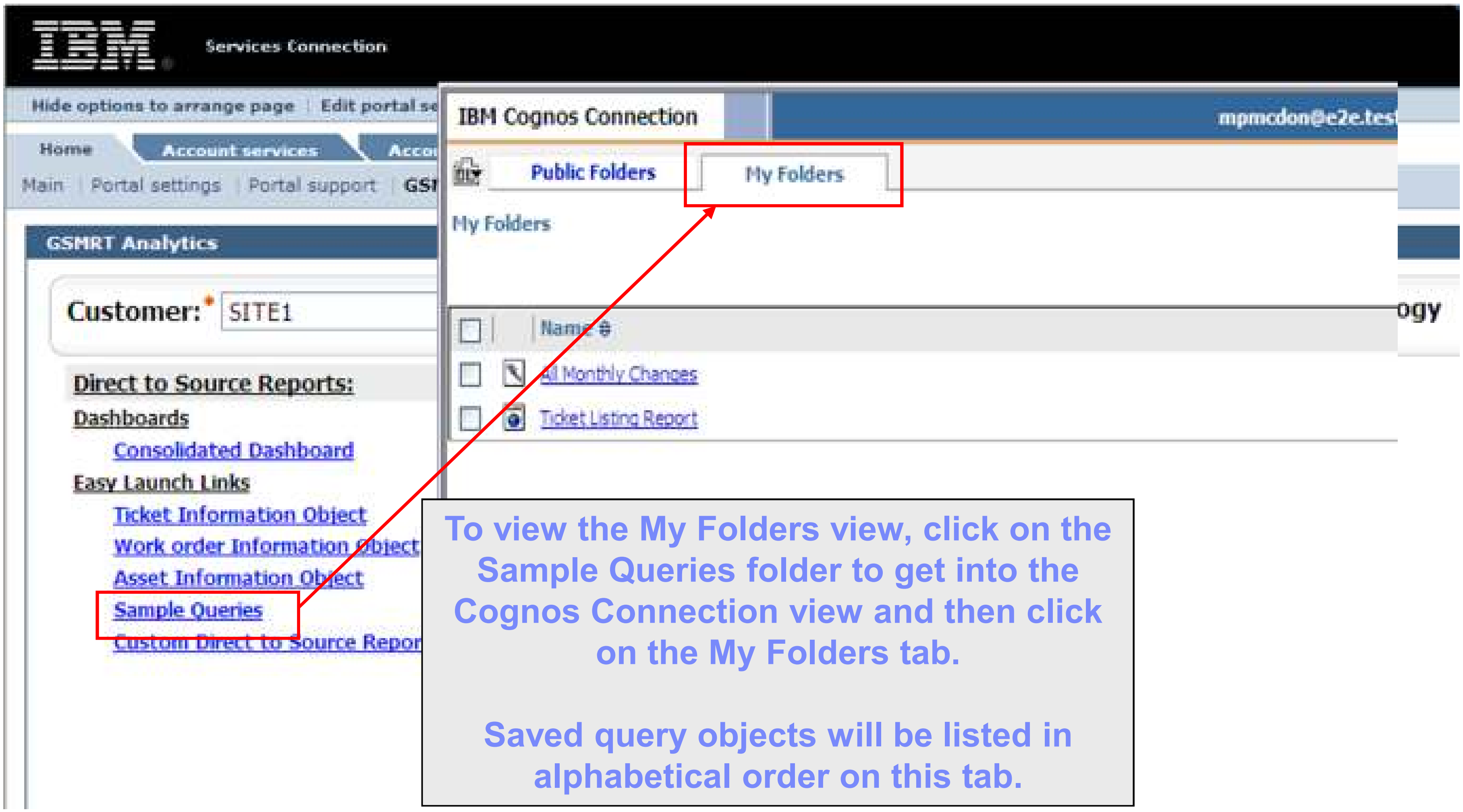
GSMRT Emailing and Scheduling Reports



GSMRT Analytics emailing and scheduling – My Folders tab

- GSMRT Analytics contains robust functionality to allow users to schedule and email their reports and reporting objects in Cognos. All scheduling or emailing of reports must be done using objects you have saved into the My Folders tab.
- Any report or query can be saved or copied into the My Folders tab where it becomes personal to your user ID. You can schedule any object from this view or run it directly in a number of different formats.
  - For instance, if you like one of the sample queries but wanted to add or delete a few fields, you can add or delete the desired fields, then save it in My Folders and then schedule it
- There is a 15 MB limit on any files emailed whether it be through scheduling or through any other email option.

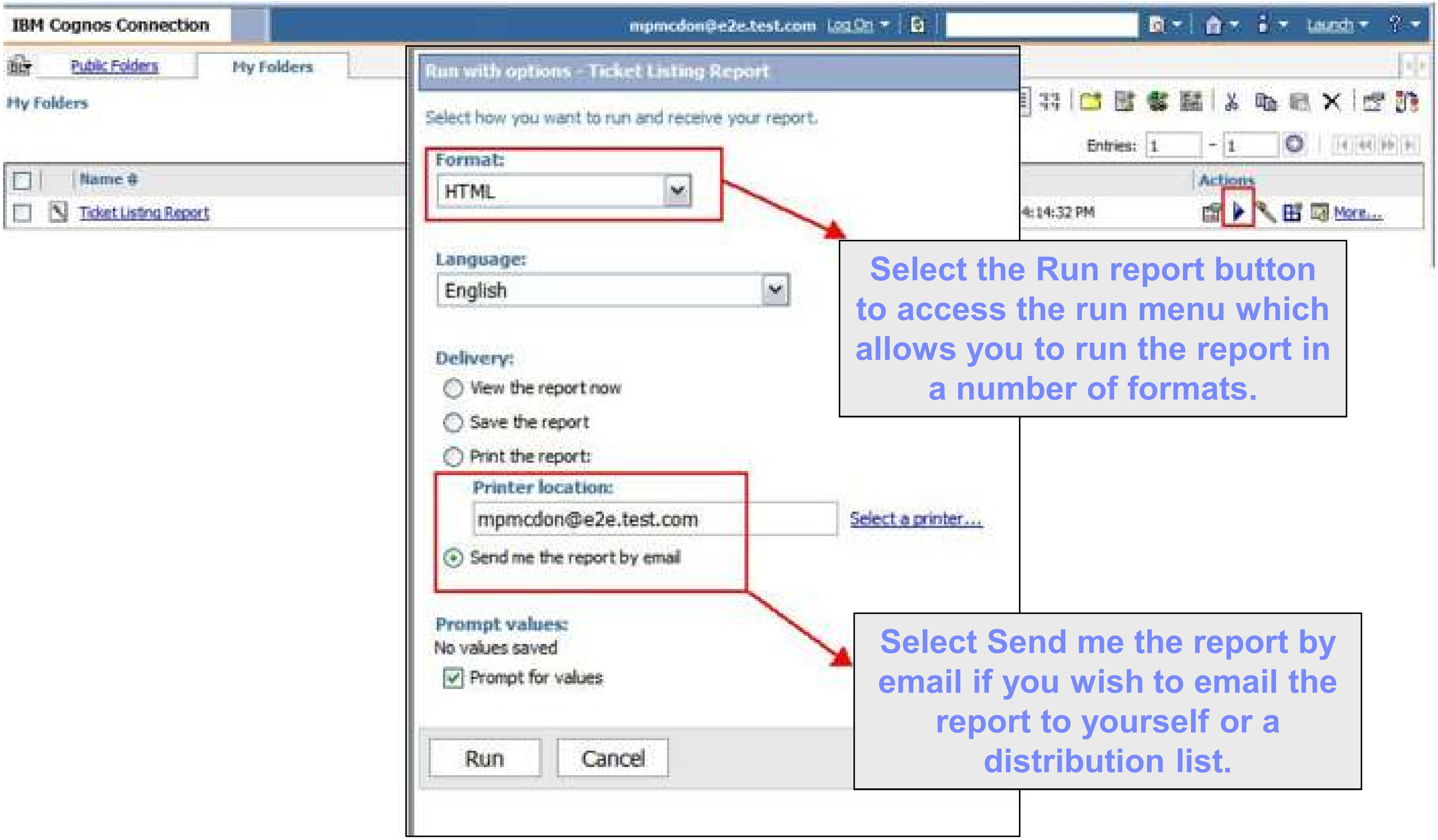
Accessing the My Folders view



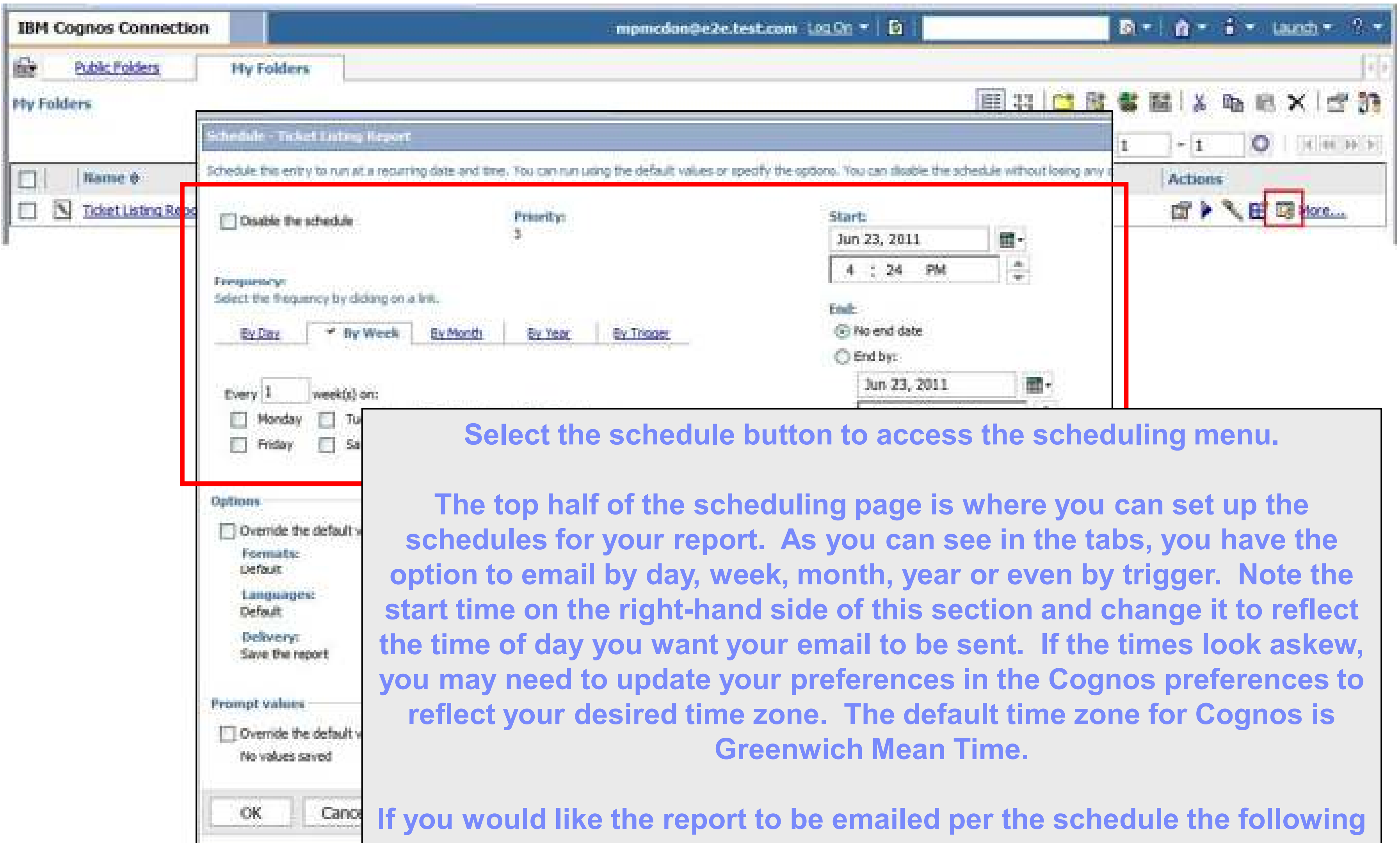
To view the My Folders view, click on the Sample Queries folder to get into the Cognos Connection view and then click on the My Folders tab.

Saved query objects will be listed in alphabetical order on this tab.

Running and emailing from the My Folders view



Setting up schedules

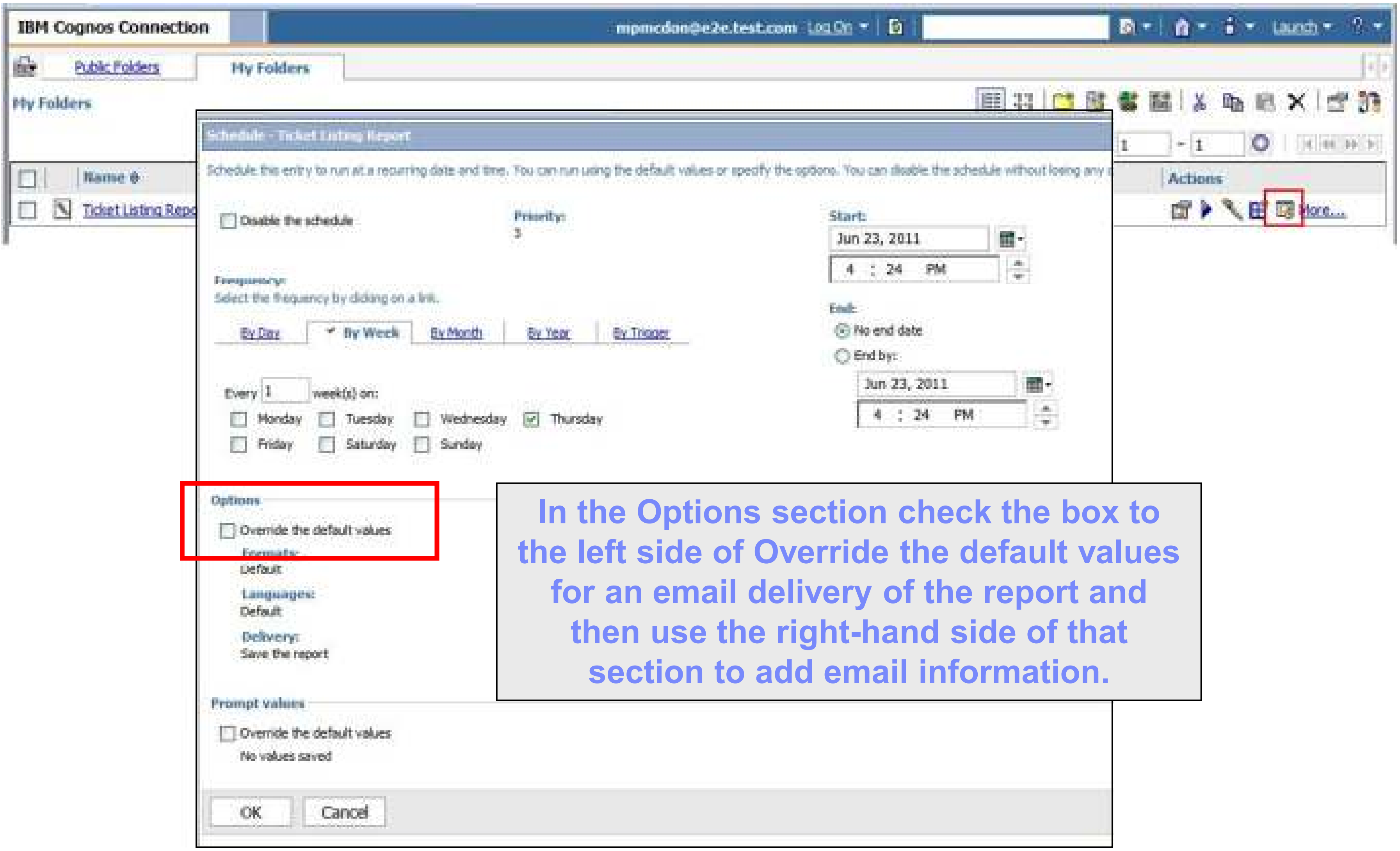


Select the schedule button to access the scheduling menu.

The top half of the scheduling page is where you can set up the schedules for your report. As you can see in the tabs, you have the option to email by day, week, month, year or even by trigger. Note the start time on the right-hand side of this section and change it to reflect the time of day you want your email to be sent. If the times look askew, you may need to update your preferences in the Cognos preferences to reflect your desired time zone. The default time zone for Cognos is Greenwich Mean Time.

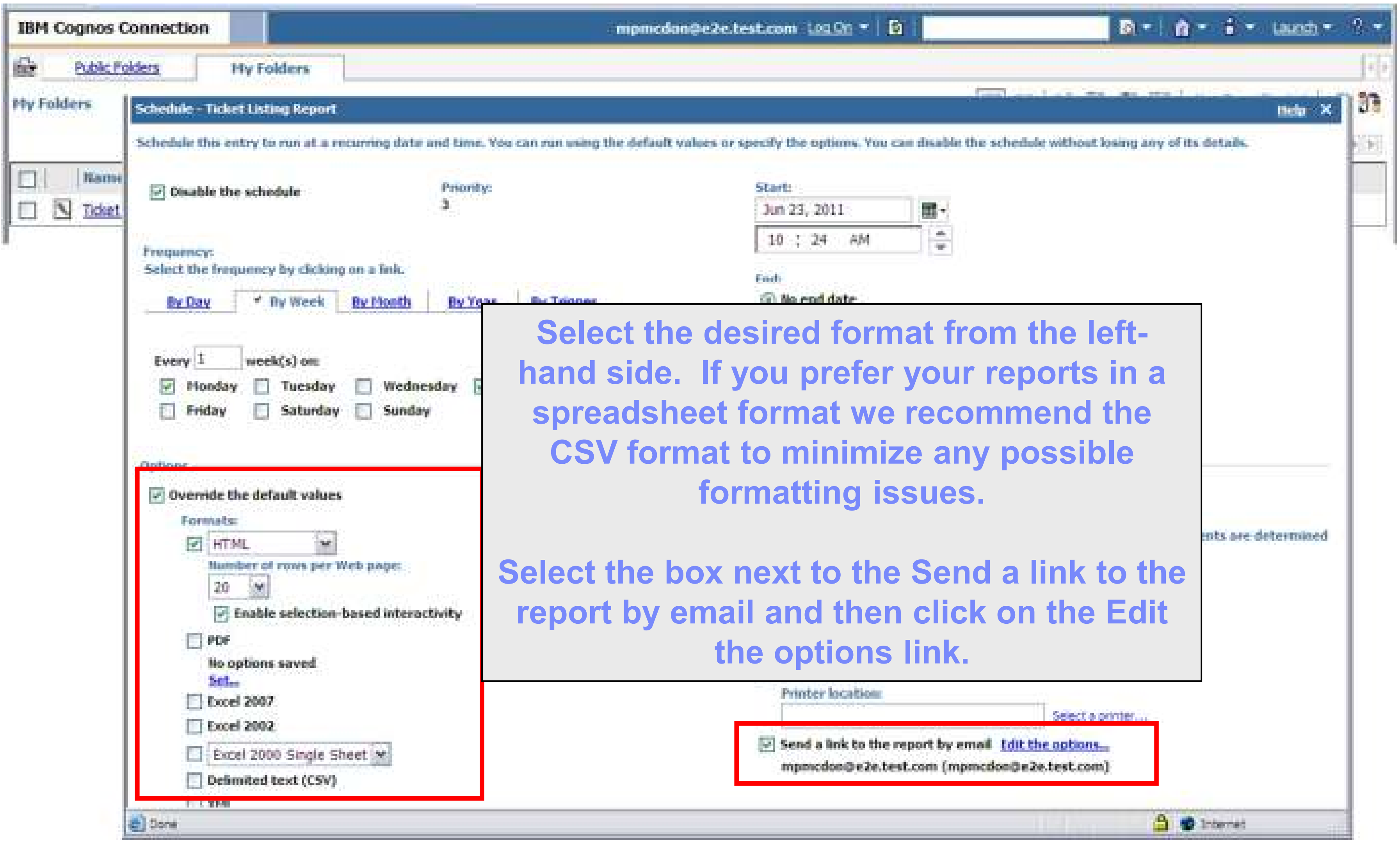
If you would like the report to be emailed per the schedule the following few slides show how to set up the email portion.

Emailing from the My Folders view



In the Options section check the box to the left side of Override the default values for an email delivery of the report and then use the right-hand side of that section to add email information.

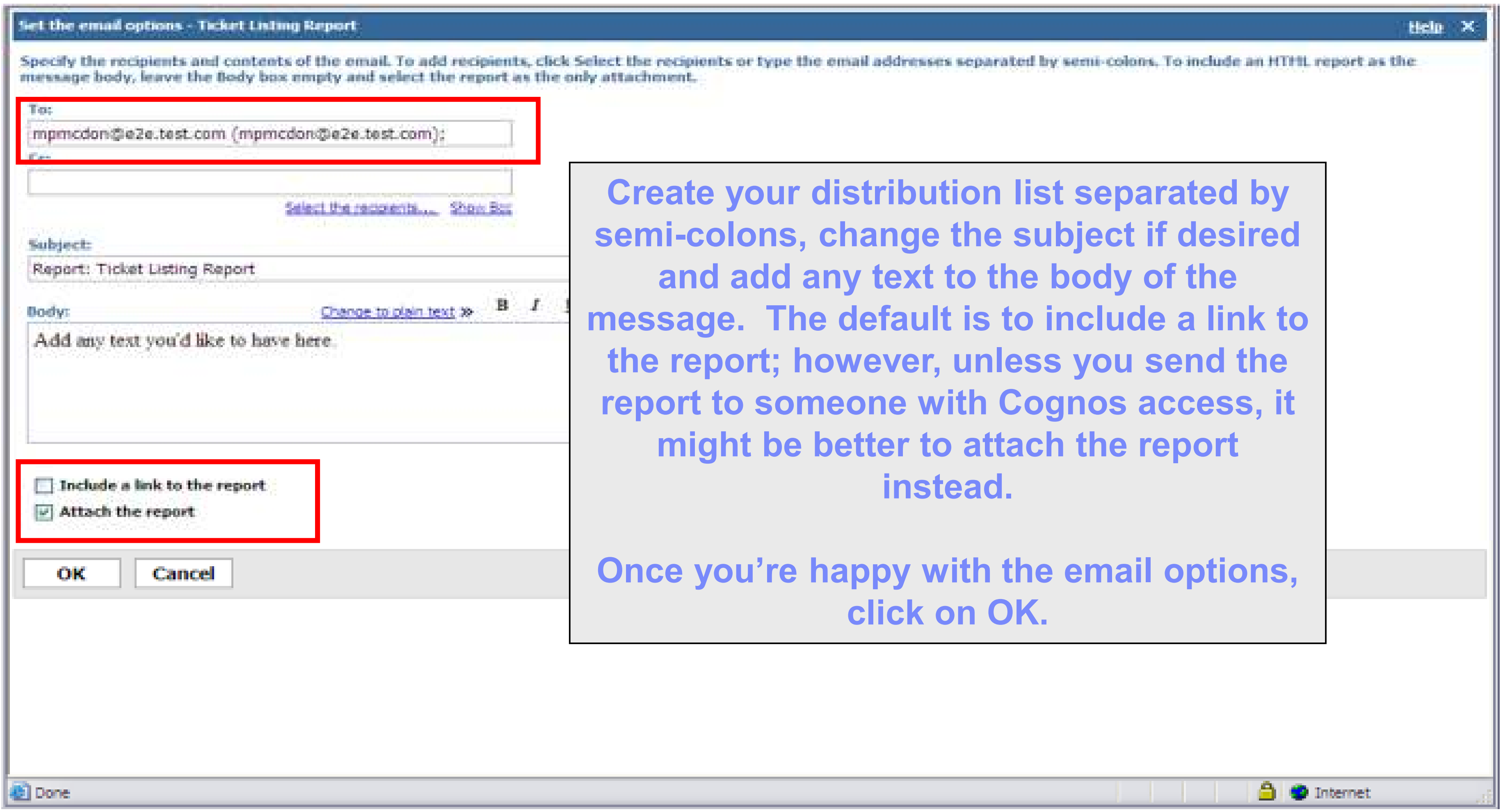
Emailing from the My Folders view (continued)



Select the desired format from the left-hand side. If you prefer your reports in a spreadsheet format we recommend the CSV format to minimize any possible formatting issues.

Select the box next to the Send a link to the report by email and then click on the Edit the options link.

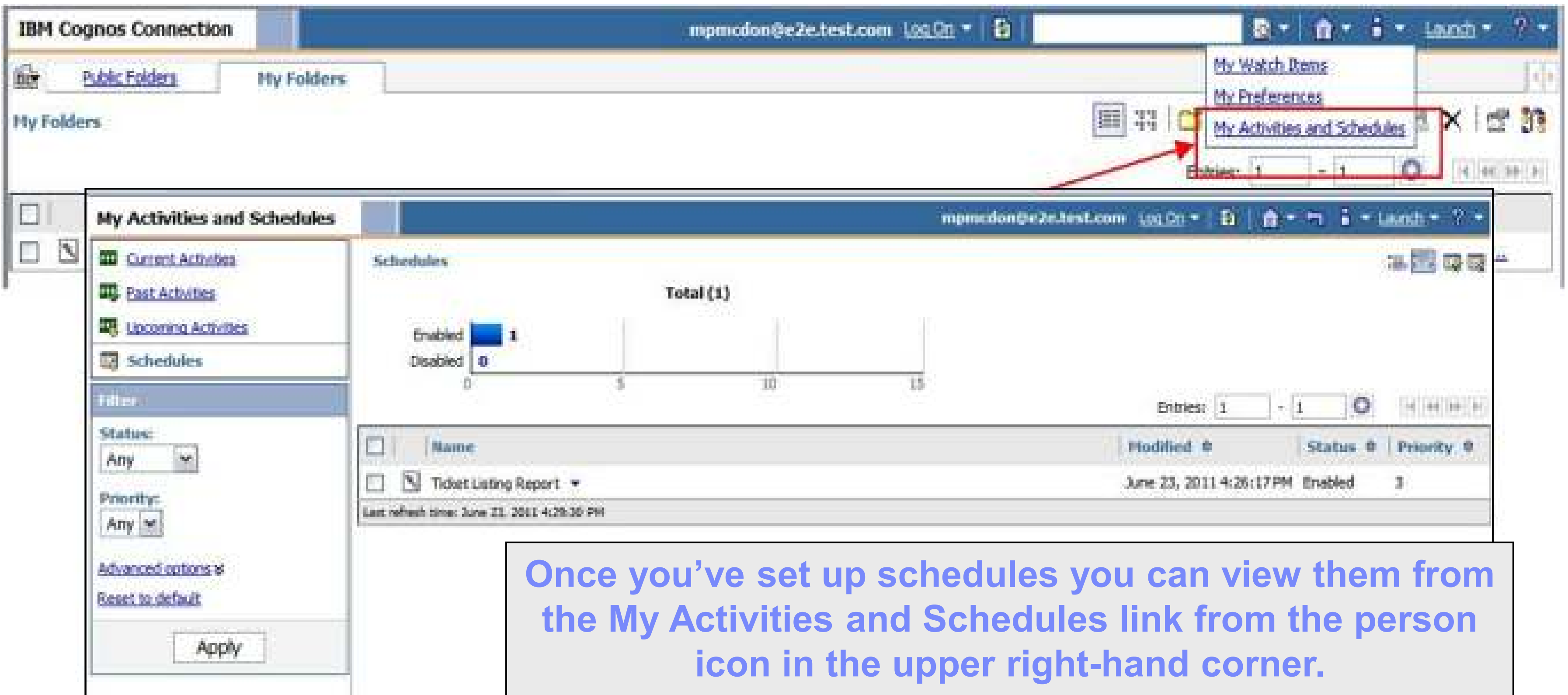
Emailing from the My Folders view (continued)



Create your distribution list separated by semi-colons, change the subject if desired and add any text to the body of the message. The default is to include a link to the report; however, unless you send the report to someone with Cognos access, it might be better to attach the report instead.

Once you're happy with the email options, click on OK.

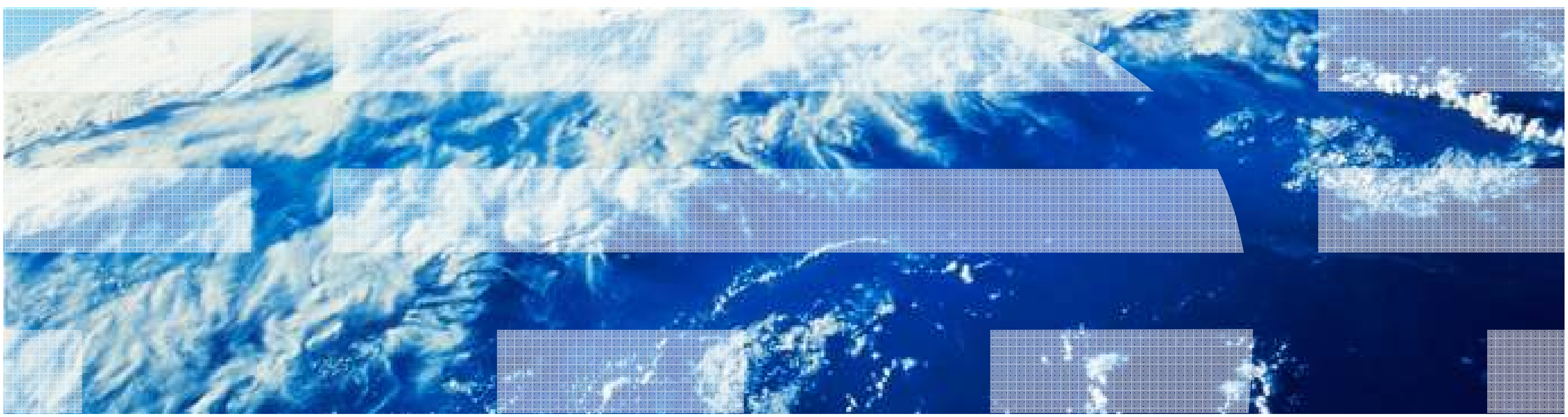
Accessing your schedules from the My Folders view



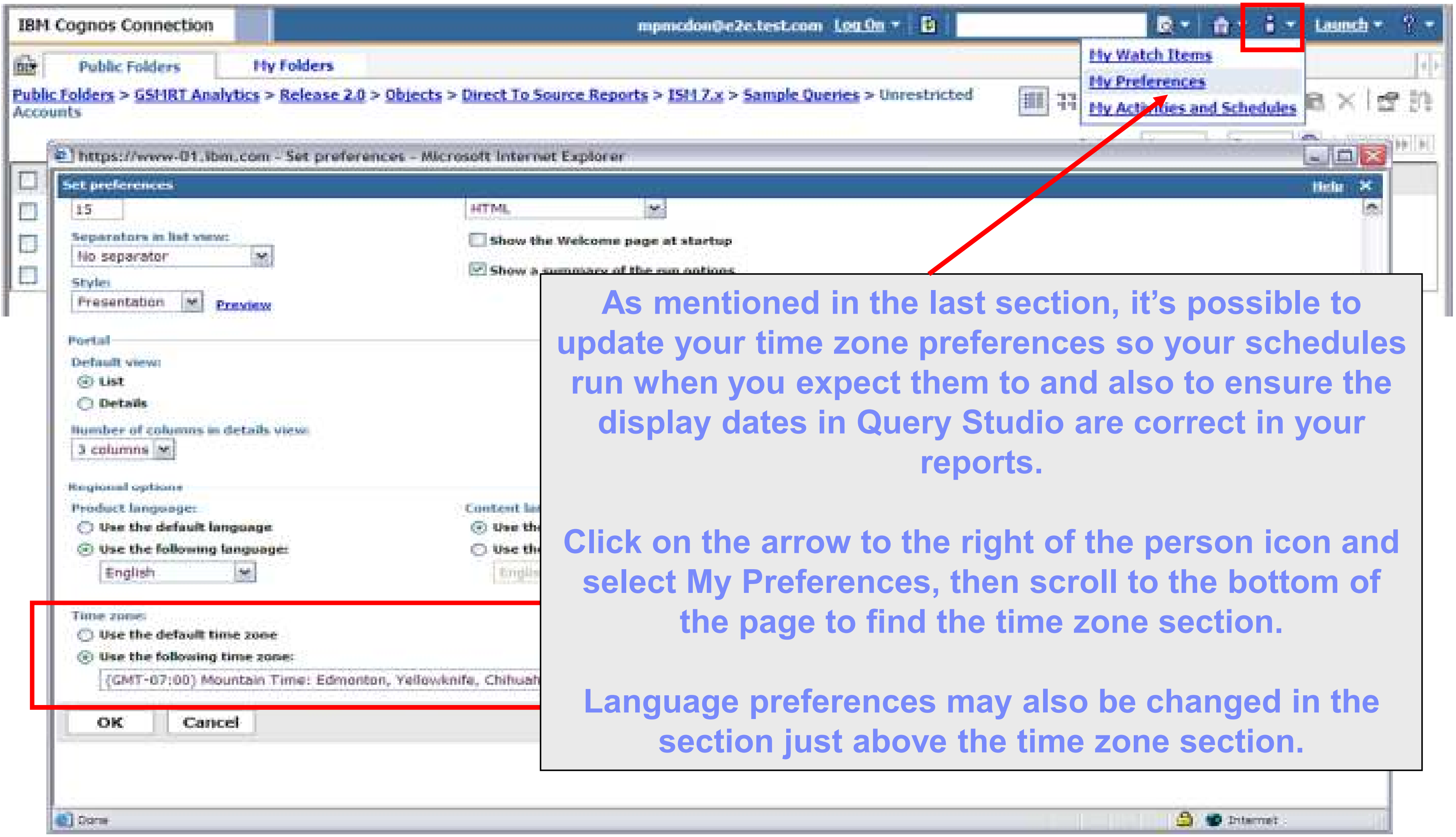
Once you've set up schedules you can view them from the My Activities and Schedules link from the person icon in the upper right-hand corner.

The person icon is also where you can change your time zone preference by going into the My Preferences section and scrolling down to the bottom.

Updating Preferences



Updating language and time zone preferences

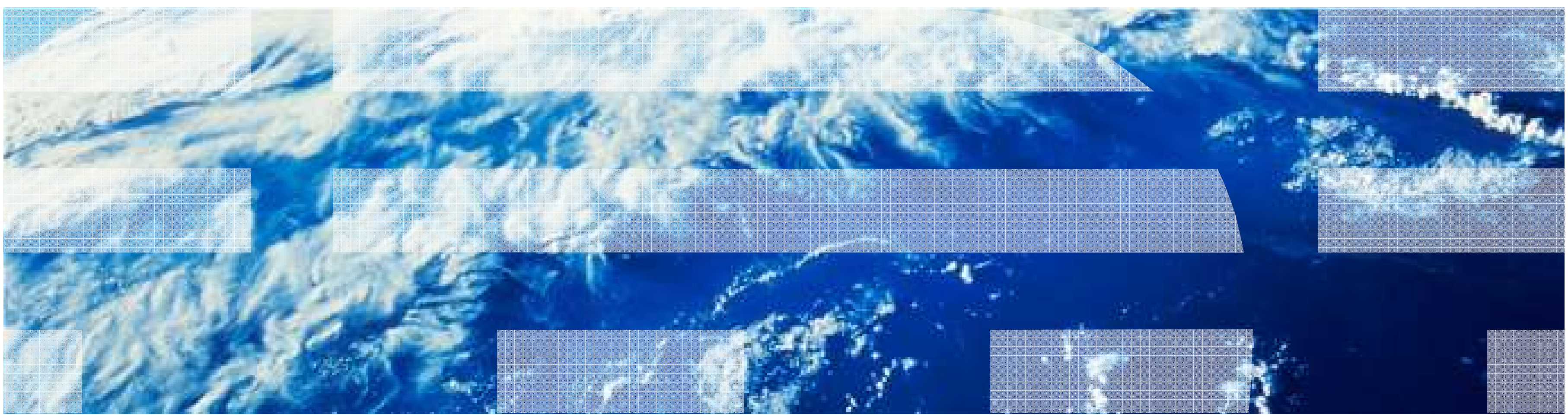


As mentioned in the last section, it's possible to update your time zone preferences so your schedules run when you expect them to and also to ensure the display dates in Query Studio are correct in your reports.

Click on the arrow to the right of the person icon and select My Preferences, then scroll to the bottom of the page to find the time zone section.

Language preferences may also be changed in the section just above the time zone section.

Appendix



GSMRT Analytics Query Studio pros and cons

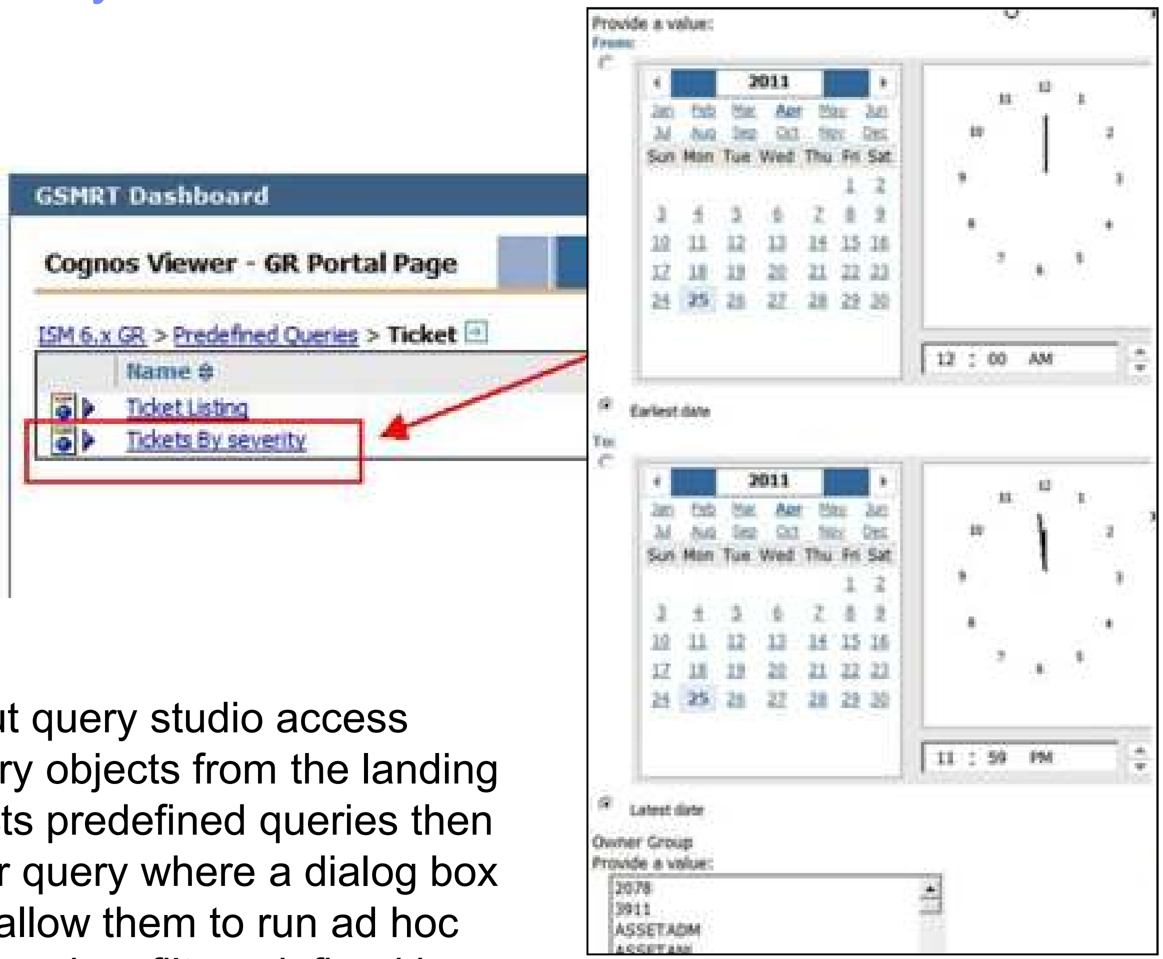
Pros

- In Cognos, if four columns are requested, only those four columns are queried. Result = GREAT performance and quick returns of data!
- Excel 2007 support is available in Cognos for report outputs. This allows for data with more than 65k rows to be dumped to Excel.
- Robust filtering:
  - Filters can be applied to nearly any column
  - Filters display all possible values (loaded dynamically) from the database for easy selection
  - Multi-select filters with list controls (no need to learn complicated syntaxes to specify filters)
  - Ability to specify OR condition in filters
  - All filter conditions are sent directly to database, resulting in great performance
- Ability to create charts in your report.
- Robust formatting – changing font styles, column names, borders, and more are all available when the results are run in HTML format.
- Ability to create pivot table like reports.
- Robust sorting and grouping functionality.

Cons

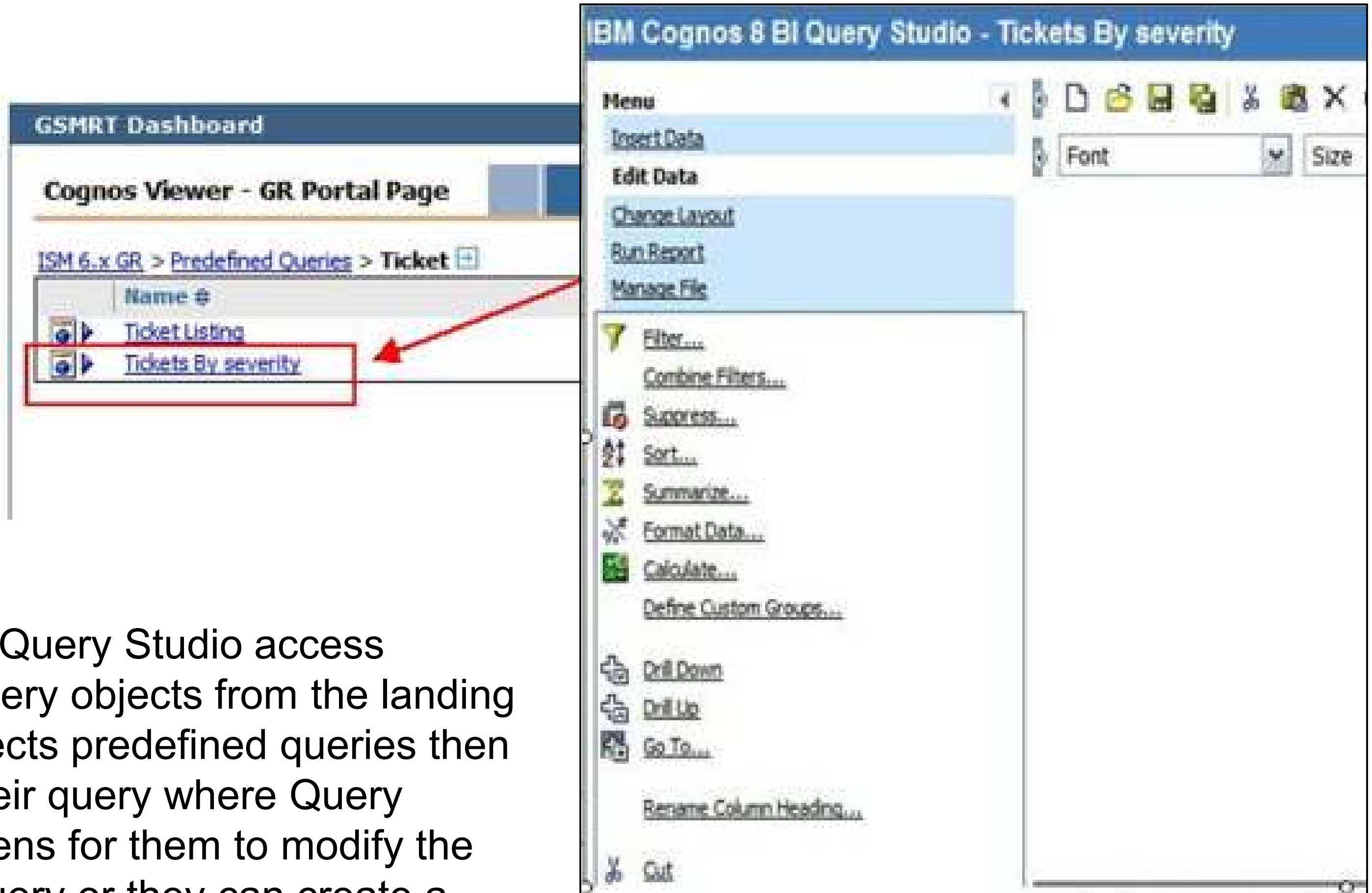
- Not everybody on an account will receive access to create queries. Custom queries created by the GSMRT team will be accessible to everyone.
- All queries created by an end-user are private to that user.
- Training is required on Query Studio.

GSMRT Analytics user view



User without query studio access selects query objects from the landing page, selects predefined queries then selects their query where a dialog box pops up to allow them to run ad hoc reporting based on filters defined in query studio.

GSMRT Analytics Query Studio user view



User with Query Studio access selects query objects from the landing page, selects predefined queries then selects their query where Query Studio opens for them to modify the defined query or they can create a new query.

Excel download help

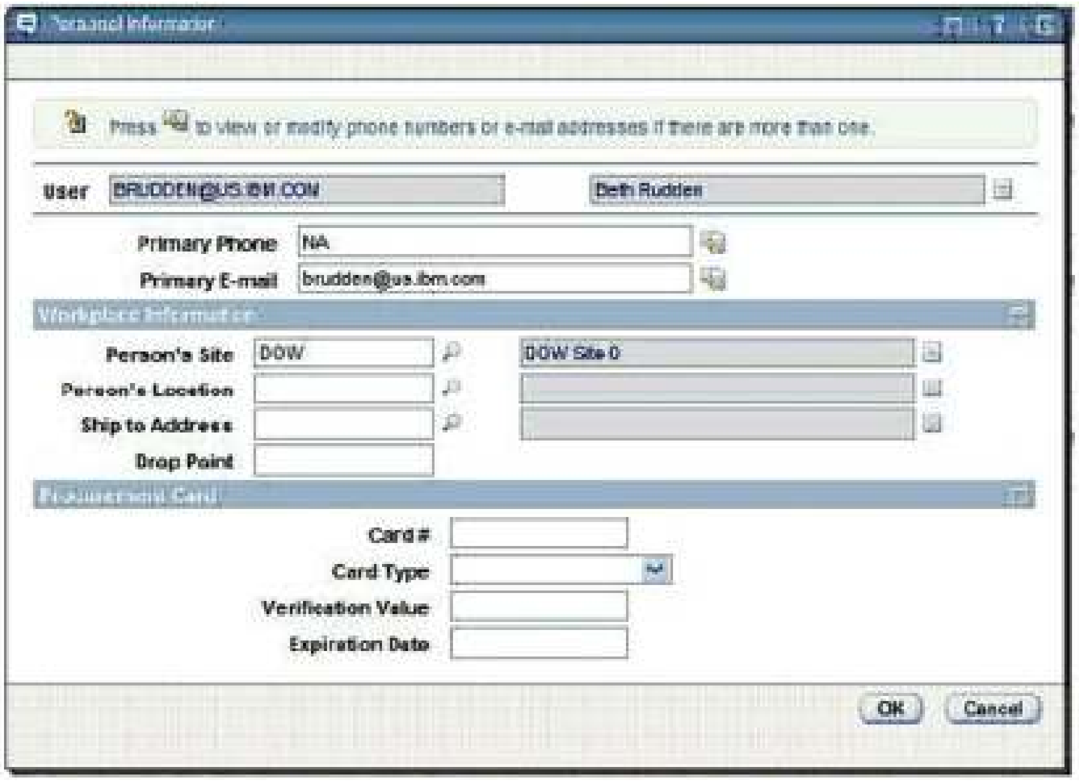
Option 1) This method is the simplest of all and **should always be used as the first option to solve all Excel download problems with Cognos or Actuate.** The path is Tools - Internet Options - Security tab. Click on sites and add the ISC site (www.ibm.com/services/connection) to trusted sites. Once this is done, any download problems should go away.

Option 2) IE|Tools|Internet Options|Security Settings|Custom Level

This option will work for both Actuate and Cognos. This is a safer method and the only time it is not possible to use this is when external customers cannot modify security settings on Internet Explorer.

Checking your email address in ISM

To update the email address associated with the user ID on ISM. In ISM -> go to Profile -> User Information



Report names and samples are illustrative of current reports and report packages. We are continually making enhancements to our reports and offerings. Therefore, report names, content and packages may change and vary from what is furnished in this presentation and these samples should not necessarily be considered final representations of items we may be engaged to deliver in the future.

GSMRT Training Team

August 2013

End of User Guide