New Features
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IBM® Cognos® Business Intelligence enables companies to outperform by giving business users the freedom they need to make smarter decisions. It offers:

- Analytics everyone can use to answer key business questions (p. 7).
- Collaborative BI and workflow that allows teams to share insights and gain alignment (p. 19).
- Actionable analytics everywhere to put insight into action (p. 23).

This release also offers platform enhancements that help IT deliver enterprise-scale analytics (p. 27).

This document provides an organized view of the new features of IBM Cognos Business Intelligence. For more information about new and changed features, see the specific product documents such as installation guides and user guides.

**Audience**

This guide is for information technology administrators, data modelers, report authors, and users of IBM Cognos Business Intelligence. To use this guide effectively, you should be familiar with one or more of the following items, depending on your role in your organization:

- IBM Cognos Business Intelligence and its components
- The existing server environment and security infrastructure in your organization
- Your company’s business requirements
- Your company’s business intelligence environment
- Database and data warehouse concepts
- Security concepts

**Finding information**

To find IBM® Cognos® product documentation on the web, including all translated documentation, access one of the IBM Cognos Information Centers at http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp. Updates to Release Notes are published directly to Information Centers.

You can also read PDF versions of the product release notes and installation guides directly from IBM Cognos product disks.

**Using quick tours**

Quick tours are short online tutorials that illustrate key features in IBM Cognos product components. To view a quick tour, start IBM Cognos Connection and click the Quick Tour link in the lower-right corner of the Welcome page. Quick Tours are also available in IBM Cognos Information Centers.
Accessibility Features
Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. This product has accessibility features. For information on these features, see "Enabling access for more people" (p. 17).

Forward-looking statements
This documentation describes the current functionality of the product. References to items that are not currently available may be included. No implication of any future availability should be inferred. Any such references are not a commitment, promise, or legal obligation to deliver any material, code, or functionality. The development, release, and timing of features or functionality remain at the sole discretion of IBM.

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Chapter 1: Analytics everyone can use to answer key business questions

Organizations need to make the most of a workforce that is increasingly driven to multi-task, network and collaborate. IBM® Cognos® Business Intelligence delivers analytics everyone can use to answer key business questions.

Easily view, assemble, and personalize information
Business users often don’t know how to get at the information they need, and the available tools may not provide the freedom to combine and explore information in the way they want. IBM Cognos Business Intelligence provides features that allow business users to easily view, assemble, and personalize information to follow a train of thought and generate a unique perspective. Using a single place to quickly see a view of their business, users can quickly personalize content, build on others’ insights, and incorporate data from a variety of sources. These capabilities ensure that more people are engaged in providing unique insights and delivering faster business decisions. Giving business users greater self-service control reduces demands on IT and business intelligence systems.

Explore all types of information
If a separate tool is required, it is difficult to incorporate statistical results with core business reporting. IBM Cognos BI allows business users to consume fact-based statistical evidence to support key decisions directly in the IBM Cognos BI environment. The ability to explore all types of information from all angles to assess the current business situation provides a deeper understanding of the patterns that exist in data. This allows business users to quickly deliver reports that include statistical insight and validation, and distribute these reports to the larger business community.

Analyze facts and anticipate tactical and strategic implications
Business users need tools that let them accurately evaluate and identify the impact that different scenarios will have on the business and on the bottom line. IBM Cognos BI allows the business user to analyze facts and anticipate strategic implications by simply shifting from viewing data to performing more advanced predictive or what-if analysis. Understanding the scenarios that affect business enables the business user to make informed recommendations to the business and provides an increased competitive advantage.

New self service interface for business users
IBM® Cognos® Business Insight Advanced provides a single integrated environment for advanced business users who need to do more than consume reports and dashboards that have been authored for them.
Business Insight Advanced does not require you to use different user interfaces depending on whether the data is dimensional or relational, and whether your primary task is report authoring or data exploration.

Business Insight Advanced can be used to author new reports on relational or dimensional data. It can create and format a wide variety of reports including lists, cross tabs, charts, and financial statement style reports. It can also be used for OLAP exploration. You can seamlessly mix exploration and authoring activities without switching interfaces or modes.

Features of the self service interface

IBM® Cognos® Business Insight Advanced is both an extension of and a replacement for Report Studio Express authoring mode. This section describes major features that Business Insight Advanced has which Report Studio Express authoring mode did not.

For more information about any of these features, see the Business Insight Advanced User Guide.

Business Insight provides more flexible utilization of dashboards and reports

Sometimes business users need to create new reports or explore data from scratch to answer a new question. But often there is an existing report or dashboard that can be customized to answer the question. The integration of Business Insight Advanced into the Business Insight solution makes it easy to find that existing report or dashboard.

Business Insight Advanced can be used by itself or as part of the broader IBM Cognos Business Insight solution. When used as part of Business Insight, you use the dashboard mode of Business Insight to create, share, consume, and explore interactive dashboards. Then, to perform deeper analysis or customize the look of a report, you select a single report on the dashboard and graduate to Business Insight Advanced. There you can perform more advanced data exploration and customization, such as the addition of measures, conditional formatting, and advanced calculations. On completion of the advanced work you can return to the Business Insight dashboard mode where the dashboard will now show your customized and extended content.

Support for charting

In Business Insight Advanced, you can create reports containing charts to quickly communicate summary and trend data through visualization. You can create and customize charts in Business Insight Advanced. You can insert a specific chart type from any report with the insert chart button on the toolbar or by dragging a chart object from the Toolbox tab. When you insert a chart into a report that already contains a list, the list data is added to the chart automatically.

Support for relational data sources

Business Insight Advanced extends Report Studio Express’ data access through support for both dimensional and relational data sources, providing the business author with a seamless authoring experience no matter what the data source.

Business Insight Advanced can be used with packages that contain relational data, dimensional data, or a combination of the two.
**Data exploration in Business Insight Advanced**

The user interface of Business Insight Advanced is now designed for data exploration as well as authoring. It enables users to seamlessly mix authoring and exploration activities when working with their data.

When working with dimensional data sources, you can drill up and down in a report by selecting and then clicking data items. In addition, you can perform additional exploration actions by right-clicking a member in a set or using the **Explore** option on the **Data** menu.

**Use your own external data in Business Insight Advanced**

You can now supplement your enterprise data with your own external data file. You can import text, spreadsheet, and other personal files from your computer into Business Insight Advanced and create reports that contain your own data, or a combination of your own data and enterprise data. This allows you to build reports and dashboards which combine trusted enterprise data with external, departmental, or transient data sources, without the need to ask your administrator to set up additional data source connections.

After import, your external data file is protected by the same IBM Cognos security as your enterprise data, thus allowing you to report on your data in a secure environment.

**Easily lay out report pages**

With Business Insight Advanced you can create a wider variety of reports than with Report Studio Express authoring mode. You can create reports containing multiple views of the same data to quickly communicate different aspects of the data through visualizations and text.

You can design your report pages using a variety of layout options such as columns, rows, or quarters. Your report objects then fit into the report sections.

**Improved data filtering**

Business Insight Advanced includes a flexible and powerful capability to define data filters.

In addition to context filters, you can now add filters in your report to exclude data based on a condition. For example, you can select a value in your report, and filter out all values that are less than the one you selected. You can also combine filters to create more complex conditions.

You can also filter sets of members to show only the top or bottom values. For example, if you have a crosstab showing revenue for each product line for all years, you can filter the product lines to show only the top three product lines by revenue.

**Business Insight Advanced provides an enhanced user interface**

The Business Insight Advanced user interface is more intuitive and easier to use than Report Studio Express authoring mode. It includes the following improvements:

- A new **Properties** pane lists the formatting properties that you can set for an object in a report.
- You can access all the sorting options from the same sort button.
- For dimensional model data sources, you can switch between viewing a metadata tree and a member oriented data tree by clicking the buttons at the top of the tree panel.
The insert individual members button and the insert member with children button have moved to the Insertable Objects pane.

**Summarizing data**

You can now easily add a wider variety of summary types into your reports without having to use IBM Cognos Report Studio.

You can add the following summary values to your reports:

- total
- count
- average
- minimum
- maximum

**Considerations for upgrading to Business Insight Advanced**

Reports built with Report Studio Express authoring can be opened, edited, and extended with Business Insight Advanced.

Because Business Insight Advanced supports both relational style authoring and OLAP style exploration in a single interface, it is an attractive option for users of Query Studio or Analysis Studio. Reports built in Query Studio or Analysis Studio can be opened, edited, and extended with Business Insight Advanced.

**Changes to some actions to support exploration**

The focus of the Business Insight Advanced user interface is data exploration. As a result, the default behavior of some actions has changed. For example, double-clicking an item now drills down, and when inserting members, you now insert sets by default. If you prefer to use the defaults from IBM Cognos BI version 8.4, you can configure Business Insight Advanced to behave like the Report Studio Express authoring mode.

**Changes to default behaviors for inserting members into reports**

The following are new default behaviors for members when working with dimensional data sources:

- The default behavior for inserting members from the source tree into your report is now to insert members with their children and to create sets.
- The default behavior for double-clicking a member is now to drill up or down on that member.
- The default behavior for replacing a member is now to replace the entire edge rather than just one node.
New report consumption experience

Business users want to access and utilize the information that drives their decision processes in a simple visually compelling application. They need a level of capability that suits their needs, but can be expanded as skills and information requirements change.

The decisions that business users make often require changes to the view on the information. These changes can be minor, such as changing the way data is sorted, or more complex, such as using an existing report as the starting point for a new report. The business user wants to quickly change the view to address their questions, find results, and then take action. They do not want to wait for a report author to make minor changes for them. IBM® Cognos® Business Insight was developed to meet those needs.

Business Insight provides an integrated business intelligence experience for business users. This web-based tool allows you to use IBM Cognos content to build sophisticated interactive dashboards that facilitate collaborative decision making. These dashboards can include traditional business intelligence assets, along with IBM Cognos Real Time Monitoring information, TM1® Websheets and CubeViews, as well as external data.

Features from IBM Cognos Go! Dashboard and IBM Cognos Viewer are now merged into one user interface. This brings information consumption, rather than viewing and opening folders, to the forefront of the experience. IBM Cognos Viewer and IBM Cognos Connection are still available and maintained in this release.

The intuitive user interface provides a breadth of capability in one place rather than a depth of capability in any one area. The user interface is visually attractive, easy to use, and interactive.

Key features include the following:

- Free-form layout of dashboard elements
- Interaction that allows you to sort, filter and group data, perform calculations, change display types, customize the palette, and add comments
- On-demand menus and toolbars that are automatically activated when you select them with the mouse
- Seamless round-trip integration with IBM Cognos Business Insight Advanced. This allows for more advanced exploration and enhancement options for the objects included on the dashboard.

Integrated statistical insight

IBM® Cognos® Statistics, powered by IBM SPSS®, provides analysts with the ability to distribute reports with statistical insight to the larger business community, further expanding the breadth of reporting capabilities provided by IBM Cognos software.

Whether it’s obtaining additional insight into key business variables or predicting future outcomes, IBM Cognos Statistics provides the necessary fact-based statistical evidence to support key organizational decisions.

Because IBM Cognos Statistics is seamlessly integrated into IBM Cognos Report Studio, analysts no longer need to extract standardized trusted data from their BI data warehouse into a separate
tool to conduct and report on statistical information. Analysts can now easily assemble reports containing statistical information and distribute the information across the enterprise saving valuable time. The statistical capabilities provided by IBM Cognos Statistics are powered by the trusted market leading IBM SPSS statistical engine, enabling you to make the most of best-in-class analytics within your organization.

IBM Cognos Statistics is easy to use for existing Report Studio authors because it uses Report Studio objects, and provides a convenient wizard interface. For more information, see the Report Studio User Guide.

**Statistical Process Control**

Statistical Process Control (SPC) enables organizations to increase profitability through the reduction of errors, waste, and overall time spent within the process. With the introduction of SPC features, organizations can now consistently measure, monitor, and analyze variations in their business processes using IBM Cognos Statistics while leveraging their existing IBM Cognos BI content and infrastructure.

IBM Cognos Statistics is ideal for organizations embracing Six Sigma. It provides a wide range of SPC capabilities including control charts such as X-bar charts and P-Charts, metrics such as process capability, process performance indices, and the ability to flag exceptions using control rules. In addition to sharing statistical insight through Report Studio, organizations can also easily monitor and share the results of their critical business processes through dashboards created by IBM Cognos Business Insight.

**Data analysis and testing**

In today’s competitive environment, it is important to recognize the factors that influence business outcomes and understand the relationships between key business variables. Without knowing the relationships within the data, analysts and decision makers are not aware of the ripple effects that changes can have, and it is difficult for them to test their assumptions. IBM Cognos Statistics addresses this problem by providing key statistical tests. Statistical analysis techniques exposed in Report Studio include regression, correlation, t-tests, chi-square, and ANOVA tests.

**Insight into the distribution and shape of data**

In conducting and communicating statistical analysis, it is important to understand the shape and distribution of your data. IBM Cognos Statistics provides several features to help you understand the shape of your data. Visualizations, such as a histogram, can provide quick insight into the distribution of a data set to identify whether the data is normally distributed, as in a bell curve, or skewed. Alternatively, a boxplot can uncover anomalies within the data set that, if not identified, can distort the results of your analysis. IBM Cognos Statistics also provides descriptive statistics such as mean, standard deviation, variance, and skewness to provide a fast and easy way to access basic statistics about your data set.

**Installation considerations**

IBM Cognos Statistics introduces new functionality that is not in previous versions of Report Studio. IBM Cognos Statistics requires a separate installation which is dependent on an IBM Cognos Business Intelligence version 10.1.0 installation. For more information, see the IBM Cognos Statistics Installation and Configuration Guide.
Enhancements to Report Studio

Report Studio enhancements are focused on accelerated authoring and richer capabilities.

For more information about enhancements to Report Studio, see the Report Studio User Guide.

Enhanced charts

Chart enhancements concentrate on improved effectiveness of communication. The new bullet chart and extensions to pie and gauge charts are especially beneficial in dashboard reports. Additional enhancements provide superior presentation through conditional notes and markers and improved legends.

Current default charts and legacy charts

Report Studio has a new default chart technology. Any new charts added to a report created in a previous release use the new default charts.

The new default charts have more properties that allow you to customize more aspects of the chart. In addition, the current default charts offer you a preview of the style changes that you make to your chart.

If you prefer to continue working with the legacy charts, you can select the Use legacy chart authoring option.

You can also convert legacy charts to the current default charts if you wish to use the new chart features.

Bullet charts

You can now create bullet charts to complement your dashboard reports and as an alternative to gauge charts. A bullet chart features a single primary measure, such as current revenue. It compares that measure to one or more other measures, such as the target or planned revenue, and displays it in the context of a qualitative range of performance, such as poor, satisfactory, or good.

Chart matrix

You can now convert a complex nested chart into a matrix configuration that shows multiple small charts arranged in rows and columns. The numeric scale of all the charts is the same so that you can easily compare and analyze values from each chart.

Customize the legend

You can hide or show the legend and change its position relative to the chart object, chart area, or by using a specific report expression.

If there are items in your legend that are too long, you can truncate them at a specific number of characters. You can also show the values of the data items in your legend.

Legends can display trend lines and conditional item entries.

Enhanced pie charts

You can customize how data labels appear in a pie chart, including their format and placement.

To make your pie charts easier to read and analyze, you can now do the following:
Pull out pie slices from the rest of the pie to highlight them.

Set the position at which the first slice in a pie chart appears.

Summarize the smaller slices in a pie chart to avoid having many tiny slices in your pie.

**Enhanced chart styles**

You can create a new chart palette or edit an existing one, by changing such things as colors, fill types, and patterns.

You can add drop shadows to chart elements such as lines in line charts.

You can customize the color, style, and weight of chart gridlines or set the background of your chart to display bands of color.

**Chart axes**

To make your charts easier to read, you can now customize the color, style, weight, and transparency of chart axis lines and specify where to display major and minor gridlines on the chart.

**Color by value in scatter and bubble charts**

In scatter and bubble charts, you can now specify data to appear in different colors based on the data values. The color of the points or bubbles adds an additional aspect to the chart to assist you in finding relationships in large amounts of data. The legend identifies the values represented by each color.

**Bubble size**

In a bubble chart, you can now set the maximum and minimum bubble size and specify the smallest bubble to show in the chart.

**Positioning and formatting notes**

When you add a note to a chart, you can now set the note’s position relative to the sides of the chart area or chart body. You can also use a report expression to position the note next to a data item within the chart. For example, in a bar chart showing revenue for each product line by country, you could type [Country]=’Canada’ to position the note relative to the Canada bar. You can also customize the background of the note with color and background images.

**Enhancements to the user interface**

Report Studio includes the following features to enhance the user interface:

- You can now position the **Insertable Objects** and **Properties** panes to the right of the work area, to match the user interfaces of Business Insight and Business Insight Advanced.

- You can now insert a specific chart type from any report with the insert chart button on the toolbar. When you insert a chart into a report that already contains a list, the list data is added to the chart automatically.
● When working with dimensional data sources, the insert individual members button and the insert member with children button are now in the Insertable Objects pane. These buttons have the same function as they did in the previous release.

● When working with dimensional and mixed model data sources, you can now switch between viewing the full data tree and the dimensional-only data tree by clicking the view package tree button and the view members tree button. These same buttons are available in the expression editor.

● You can now remove all of the filters at once from your report by using new options that are accessed from the filters button.

● Expanded tooltips for toolbar buttons now include a description of what the button does. To see a tooltip, pause the pointer over a button in the toolbar. You can turn off the expanded tooltips (Tools, Options).

**Improved set operations**

To provide faster more effective authoring of complex dimensional queries, you can now perform more operations on a set of members when working with dimensional data sources. You can do the following by right-clicking a set, and clicking *Edit Set*:

- Exclude members from the initial set or from the set as it is currently shown.
- Move members to the top or bottom of the set.
- Show only the members with the top or bottom values.
- Filter the members in a set.
- Expand and collapse a member to add its child members below it as new rows.

**Preview reports when opening and saving**

You can now see a preview of the report when you open or save it (Tools, Options, Display report preview).

**Column titles when drilling down or up**

When you drill down or up, you can now specify whether the column title shows the member caption value or the level label value.

**Custom properties for prompts**

You can now customize the text that instructs your report users how to use report prompts. For example, you can now change the default text that appears above a search text box from *Keywords* to the text of your choice.
Simplified calculations

To add a calculation, you now choose to add either a Query Calculation or Layout Calculation object from the toolbox tab.

Function description improvements

The functions that you can use to create calculations now include improved descriptions and more examples. The descriptions and examples appear in the Report Studio user interface and in the Report Studio User Guide.

New default report style

IBM Cognos BI includes a new default report style with updated colors and gradients. If your report uses a custom report template, it will appear the same in this version of Report Studio as it did in previous versions. By default, new reports appear in the new report style.

If you want to create new reports with the custom template style, you can edit the default template for new reports to match your custom template.

List enhancements

You can now specify whether to automatically include an overall aggregate summary in the list footer.

You can also specify whether grouping a column automatically makes it the first column in the list. You enable these behaviors in the Report Studio options, by selecting the Group and automatic summary behavior for lists check box.

A new Render property allows you to hide columns from the output of list reports.

Simplified business intelligence consumption for users

IBM® Cognos® Report Studio has a new active report output type that provides a highly interactive and easy-to-use managed report. Active reports are built for business users, allowing them to explore their data and derive additional insight.

Active reports are an extension of existing Report Studio values and the IBM Cognos platform. Users will continue to benefit from the enterprise value of one version of the truth, and new interactive control types in Report Studio will serve as building blocks for creating active reports.

Layout

Users need to have their data organized in a way that is easy to consume and understand. Some prefer seeing the numbers and others prefer seeing a visualization, such as a chart.

To help report authors deliver content in the most consumable way possible, Report Studio provides new layout controls:

- Tab controls, which are used for grouping similar report items
- Decks of cards, which are used for layering report items
• Hiding or showing list columns, which allows users to control the data they see by using check boxes

**Filtering and sorting**

Users need to focus on the data they are most interested in. By allowing report authors to add easy-to-use controls to a report, users are able to interact with the data and filter it to obtain additional insight.

To help report authors deliver the content in the most consumable way possible, Report Studio provides several new filtering controls:
• List and drop down list controls
• Interactions with charts
  For example, clicking a category in a chart filters the data in a list.
• Radial buttons
• Check boxes
• Toggle buttons
• Push button controls

**Upgrade considerations**

Active reports are an extension of traditional IBM Cognos reports. Authors can upgrade existing reports and upgrade them to be interactive by adding the controls mentioned above, providing end users with an easy to consume interface.

Like existing IBM Cognos reports, you can run active reports from IBM® Cognos® Connection as well as schedule and burst them to users.

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**Enabling access for more people**

IBM® Cognos® Business Intelligence now includes features to help you create reports that are more accessible to people with a physical disability, such as restricted mobility or limited vision.

When creating reports using Report Studio and Business Insight Advanced, you can do the following:
• Add alternative text for non-text objects, such as images and charts
• Add summary text for crosstabs, lists, and tables
• Specify whether table cells are table headers

When using IBM Cognos Business Insight or IBM Cognos for Microsoft Office, report consumers can do the following:
• Navigate without a mouse using arrow keys and function keys. For more information, see the *Business Insight User Guide*. 
● Use any combination of high contrast system settings and browser minimum font settings to control the display. For example, when you set the operating system to high contrast, graphic icons are replaced with text icons for easier viewing.

● Use the Freedom Scientific JAWS screen reader. Note: JAWS is only supported with the Mozilla FireFox browser for this release of IBM Cognos Business Insight.

● Switch from graphs to tables and control the palette settings to meet their specific accessibility needs.

Business Insight is accessibility enabled. The documentation includes alternate text for all graphics so that screen readers can interpret graphics. The accessibility features, including keyboard shortcuts, are documented as well. For more information, see the Business Insight User Guide.

IBM Cognos BI provides the ability to enable accessible output at many levels. Users can enable accessible output by report, or they can choose to enable accessible output for all reports using a user preferences setting. Administrators can control assessable output as a server-wide option, so that all reports for all IBM Cognos users have accessibility features enabled. Accessibility settings in the user preferences and report properties overwrite this setting. For more information see the IBM Cognos Connection User Guide and the IBM Cognos Administration and Security Guide.

For accessible report authoring recommendations, visit the Human Ability and Accessibility Center (http://www-03.ibm.com/able/).
Chapter 2: Collaborative business intelligence and workflow

Organizations need more agile and responsive decision making processes to effectively respond to market opportunities and challenges. IBM® Cognos® Business Intelligence provides tools that support collaborative business intelligence and workflow allowing business to share insights and gain alignment.

Establish decision networks
Teams that do not share insights or solicit input from colleagues limit their ability to make informed decisions. IBM Cognos BI helps teams establish dynamic decision networks, connecting people to information and other people, and drive toward a collective intelligence. Efficient decision networks reduce the time, expense, and resources required to gather information.

Provide transparency and accountability
Business users must fully understand and trust the data that they use to make business decisions. Business users need to understand what has happened to data from source to report. IBM Cognos BI features ensure that all user communities have the same understanding of data, providing transparency and accountability to drive alignment and consensus. When users understand and are confident about the information they use, IT spends less time dealing with questions about data.

Communicate and coordinate tasks
Actionable insights are often lost because it is not easy to capture the insight as a task. IBM Cognos BI provides the tools that teams need to communicate and coordinate tasks to engage the right people at the right time. Any member of a team can initiate a task and assign activities to the appropriate team member. The team can track activities from creation to closure to ensure better business outcomes.

New collaboration capabilities
The new collaboration capabilities in IBM® Cognos® Business Insight support business users by providing a bridge between using IBM Cognos Business Intelligence to discover a business problem and acting to resolve it.

Decision making is often a team activity. Individuals create and receive reports, perform analysis, and monitor dashboards. When the time comes to act on this information, individuals come together with their colleagues to make decisions. As well as collaborating through email, phone calls, and meetings, business users now have the ability to collaborate while creating or viewing reports, performing analysis, or monitoring dashboards.

There are two ways you can collaborate using IBM Cognos Business Insight:

- Using comments
• Using activities

You can also use the additional enterprise social software capabilities in IBM® Lotus® Connections.

Comments

Comments, also referred to as annotations, allow you to collaborate on the content of a report on a dashboard. You can add simple comments to a report so that other users viewing the same report will have additional context or information about the report. Those users can respond with further comments about the report.

This type of collaboration is useful, for example, to add a reminder to investigate low sales figures for a particular product, or to explain an anomaly in the data that could be a cause for concern.

The comments feature of Business Insight is different from the existing IBM Cognos BI option that allows report users to add comments to a saved report. When you upgrade from a previous release, comments in saved reports are maintained but the comments are not upgraded to the new Business Insight comments format.

Activities

Activities is a web-based collaboration tool for collecting, organizing, sharing, and reusing work related to a goal. Members of an activity interact in an online location in which they create, collect, and share a set of ideas and resources to support a goal. An activity is a way for you to organize your work and collaborate with others in a shared web space. Because it is easy to invite new members, you can quickly gather the right people and resources you need to get the job done. You can post messages, share files and links to web sites, and create and assign to-do items. Activities are part of IBM® Lotus® Connections and are integrated with IBM® Cognos® Business Insight.

Activities is a key part of IBM Cognos Business Insight. When individuals identify business problems and opportunities using IBM Cognos BI, they often need to collaborate to share information with colleagues and to make team-based decisions. With activities, you can collaborate on the content of an entire dashboard and solve the problems or capitalize on opportunities in a faster and more structured way.

For example, you might have previously collaborated with another colleague, using comments to indicate low sales figures for a particular product. You then decide that a more detailed investigation about the sales figures is required in order to resolve the problem. You can set up an activity that involves collaborating with other team members, so that you can track the history and outcome of that activity in a single place.

Using activities for collaborative decision-making can facilitate the whole decision-making process. Activities created in IBM Cognos Business Insight provide the following:

• A single place to gather each participant’s ideas and opinions
• A link to the IBM Cognos Business Insight dashboard so that teams can conduct further analysis as required
• A single historical record of how issues are resolved and how decisions are reached
• The ability to track and audit decisions and initiatives
• The ability to include all stakeholders and interested parties in the decision-making process
• A record that can be viewed by people who join the activity after it has started to quickly understand its history

**IBM Lotus Connections**

You can use the social software for enterprise capabilities provided by IBM Lotus Connections to collaborate with colleagues outside of the dashboard. For example, having used the collaboration capabilities on the dashboard to investigate low sales figures for a product, your team may conclude that a new marketing campaign is required to promote the product. You could use Lotus Connections to set up a wiki, and to collaborate using a Lotus Connections community.

With Lotus Connections you can do the following:

• Set up a networking profile
• Set up and join communities
• Create blogs
• Bookmark your favorite websites
• Create activities
• Share files
• Create wikis

**Improved data lineage support**

Consumers and report authors now have the ability to leverage the strength of both IBM Cognos Lineage Viewer and IBM InfoSphere Metadata Workbench.

You can configure a single environment to take advantage of both the ease of deployment and maintenance of the IBM Cognos Lineage Viewer, as well as the exploration and analysis power of InfoSphere Metadata Workbench.

A new entry point for IBM InfoSphere Metadata Workbench allows users to leverage IBM Cognos Lineage Viewer for report and model information, and enables the ability to launch the Metadata Workbench to view ETL, source data, and impact analysis information.

For more information about lineage, see the *IBM Cognos Administration and Security Guide*. 
Chapter 2: Collaborative business intelligence and workflow
Chapter 3: Actionable analytics everywhere

The actionable analytics available with IBM® Cognos® Business Intelligence enables business to put insight into action.

**Adopt mobile and real-time analytics**

Employees in the field, the growing ranks of telecommuters, and business partners who are not connected to the intranet need tools and information to be fully involved in decisions. IBM Cognos BI delivers mobile and real-time analytics to tackle the challenges of compressed decision cycles. This ability extends the reach of BI and analytics to a broader audience of consumers who normally are not connected to the BI infrastructure.

**Integrate analytics everywhere**

Business users need BI in the context of where they make decisions. IBM Cognos BI makes BI available where business users make and act on decisions, including third-party applications and applications that can consume web services. Business users can combine BI content with external web and application data sources and systems for broader business insight. For developers, the task of embedding BI content into third-party applications and portals is simplified.

**Inform business processes**

Lack of process hampers the ability to consistently address critical business performance issues. With IBM Cognos BI, you can implement a manageable and traceable process that involves all stakeholders. Organizations can then understand the steps and people involved in making a decision.

**Enhancements to IBM Cognos Mobile**

IBM® Cognos® Mobile provides timely and convenient access to IBM Cognos Business Intelligence information from a mobile device. This provides decision makers with access to business critical information wherever they are and whenever they need it.

Key enhancements include the following:

- **Support for iPhone and iPad**
  IBM Cognos Mobile now supports iPhone devices. Users can use familiar iPhone actions to access the same business intelligence content and IBM Cognos Mobile features that have been available on other devices in previous releases. In addition, users can create a list of favorites and select one dashboard or report to automatically display on the Welcome screen whenever they start IBM Cognos Mobile.

- **Enhanced user interface support for both older BlackBerry editions and the newer editions, Storm and Curve**
IBM Cognos Mobile now supports the enhanced BlackBerry user interface for BlackBerry OS 4.2 and higher. The new user interface is easier to navigate than the traditional one and provides the user with an improved overall experience when accessing BI content.

- **Support for IBM Cognos Business Insight**
  Along with reports and analyses, users can now have dashboards that were created in IBM Cognos Business Insight delivered to their devices.

- **Improved prompting**
  IBM Cognos Mobile now offers improved prompting in the web application for the iPhone. Prompting no longer uses only prompt identifiers, but can now include the surrounding text and formatting that desktop users see. Users are able to run prompted reports intuitively by using prompting mechanisms that suit the mobile device.

- **Drill up and drill down**
  IBM Cognos Mobile now offers drill up and drill down capabilities. These features allow users to gain additional insight into the information they are consuming. Users can see which fields within the BI content on their devices they can drill up or drill down on. After drilling up or drilling down on one or more of those fields, they can return to the original report where they began the drilling process.

### Enhanced event management

IBM® Cognos® Business Intelligence introduces the ability to capture user action information for BI events and processes in a way that can be managed and audited. In previous versions, event authors could configure agents which would detect events within a BI data source and take action based on preconfigured criteria. Tracking user interaction with these events was limited to email and Cognos portal entries. Tracking email changes to entries alone does not provide the ability to define how users are expected to respond to an event and there was no way to capture what a user does with information provided by the event agent.

The enhanced event management features permit event authors to configure tasks to be assigned to individual users or groups of users. These tasks can include expectations about when work on a task must be started and completed. Tasks can request approval for actions to be taken based upon an event. A task can request that a user decide how the agent should proceed to execute configured tasks based upon the user’s analysis of or reaction to the event condition or task contents.

The IBM Cognos platform includes a new service to support enhanced event management functionality called the Human Task Service. This service is based on an open specification called WS-Human Tasks. IBM is leading the working group to define the WS-Human Task standards along with participation from other web standards community members.

The new enhanced event management tasks can be created as part of an agent within Event Studio as well as within a new user interface for IBM Cognos Connection called My Inbox. Task types include approval requests, ad-hoc tasks, and notification requests. All tasks remain within the IBM Cognos environment. Email notifications are generated when tasks are created, worked upon, or progressed to completion by a user. Tasks can be assigned to a Cognos Group or Role, however,
after a task is claimed, it is owned by the claiming user. The capabilities and roles of task users are implemented in IBM Cognos BI as defined by the WS-Human Tasks specification. Task users are defined as Potential Owners, Owners, or Stakeholders. Stakeholders are users who are interested in the outcome of a task.
Chapter 4: Platform enhancements to simplify and cost-effectively scale enterprise analytics

Organizations need more agile and responsive decision making processes to effectively respond to market opportunities and challenges. IBM® Cognos® Business Intelligence delivers advances for IT to simplify and cost-effectively deliver enterprise-scale analytics.

**Accelerated model design with guided workflow driven modeling**

Many organizations find that it takes too much time and too many iterations for IT to build the right models. IBM Cognos BI provides guided workflow driven modeling that is based on established best practices. A workflow driven modeling process reduces the amount of time required to deliver the right model.

**Optimized performance with in-memory processing**

It is hard to meet performance expectations because of complex processing requirements and related overhead on systems. In IBM Cognos BI, in-memory processing on 64-bit systems delivers optimized query generation with pattern intelligence, security-aware caching for query plan and query, and on-demand data and metadata caching for executed reports. These features help to deliver faster results and increased business satisfaction.

**Streamlined life cycle management with the ability to seamlessly upgrade**

The increasing scale of upgrade projects creates a challenge for IT. IBM Cognos BI reduces the complexity and risks of an upgrade by providing greater control over the upgrade process. IT can now use a staged upgrade approach to quickly deliver on new business requirements and manage costs. Other features make it easier for IT to track the application life cycle and validate content in a variety of environments before an upgrade.

**New assisted modeling**

Model Design Accelerator is a new feature in IBM® Cognos® Framework Manager that provides an assisted modeling experience for building a relational star schema model. This simplified entry point to Framework Manager will enable novice users to build models and become familiar with the modeling process. Experienced users of Framework Manager will benefit from a streamlined, top-down modeling workflow that allows them to quickly build and deploy models. Model Design Accelerator lets the modeler focus on creating a presentation layer tailored to reporting requirements.

To start, select a data source and choose the tables and views you wish to use in Model Design Accelerator. To build the star schema model, you simply drag and drop columns from your tables into the query subjects in the workspace. Existing data source relationships are automatically detected and displayed in the workspace. To enhance your reporting options, you have the ability to add model joins via a relationship editor.
As you work, each action is evaluated against modeling proven practices. Potential issues are identified and a description of the issue and the possible solutions are displayed. Once finished, a Framework Manager model will be generated which can then either be further refined in Framework Manager or published directly to IBM Cognos Connection.

For more information about Model Design Accelerator, see the Framework Manager User Guide.

New in-memory analytics

IBM® Cognos® Business Intelligence offers improved query functionality and performance through the use of the dynamic query mode. This new mode uses in-memory query processing, which allows report authors and advanced business users to do faster business analysis and make quicker decisions.

By employing an enhanced Java™-based interface, the dynamic query mode provides key query optimizations that address query complexity, large data volumes, and performance.

For more information, see the IBM Cognos BI Dynamic Query Guide. Also, the Dynamic Query Cookbook is available in the Proven Practices section of the IBM Cognos Customer Center (http://www.ibm.com/software/data/cognos/customercenter/).

Performance improvements with the dynamic query mode

The dynamic query mode provides several new features for improving query performance.

One key area is optimized query generation and performance. The dynamic query mode provides in-memory calculations and aggregate operations, along with smart query processing that combines multi-dimensional and relational concepts to achieve improved performance.

By using a 64-bit cache facility, the dynamic query mode delivers security-aware smart caching. It uses in-memory optimizations to increase query performance and data cache reuse. Smart caching includes the following features:

- Scheduled and automatic management of the cache ensures that the cache contents remain relevant and timely while reducing the repetitive query load on the data source. This allows utilization of the existing infrastructure and improves the user experience for business analytics.

- Smart load controls maximize the availability of memory for the most accessed data ensuring consistently fast performance. The system is self managing and monitors the most used data and acts accordingly

Setting up the the dynamic query mode

The use of the dynamic query mode affects configuration, administration, and modeling.

Installation and Configuration Considerations

Some configuration is required before you can use the dynamic query mode.

For more information, see the IBM Cognos BI Installation and Configuration Guide.
Administration Considerations
When you create new data source connections, you have the option to specify that they use the dynamic query mode. You can also administer the Query Service and manage the cache.
For more information, see the IBM Cognos Administration and Security Guide.

Framework Manager Considerations
In Framework Manager, during publishing, you can enable a package to use the dynamic query mode.
For more information, see the Framework Manager User Guide.

Lifecycle Manager Considerations
You can use Lifecycle Manager to test reports in the dynamic query mode prior to upgrade.
For more information, see the Lifecycle Manager User Guide.

Improvements to system management
Routine activities consume a significant portion of day-to-day IT activities. IBM Cognos Business Intelligence features continue to provide enhanced abilities to assist administrators in the management of BI applications, servers, and security. Enhancements in scheduling, administration, and audit features build upon the mature and robust IBM Cognos administration functionality to provide even greater management flexibility and insight into activities and load on the IBM Cognos BI server platform. The features allow IT to respond faster to problems and to deliver improved business user convenience and satisfaction.

Enhancements to scheduling
This release of IBM Cognos BI includes several enhancements to scheduling.

Intra-day scheduling
Scheduling in IBM Cognos BI now permits even more granular management of server resource availability and performance through use of intra-day scheduling options. Intra-day scheduling permits the restriction of recurring jobs or reports to execute within a specified window of time. For example, you can schedule job A to execute once every 30 minutes, every day between the hours of 9:00 p.m. and 11:00 p.m., and schedule job B to execute between 8:00 a.m. and 8:00 p.m. only on Saturdays and Sundays.

Controllable capabilities for user based scheduling frequency
IBM Cognos Administration lets you restrict or grant access to product functionality through settings called capabilities. Administrators can reduce the overhead required to manage IBM Cognos applications and servers by permitting users to access specific functionality which is normally only used by administrators. One such capability is the scheduling of reports or jobs processed by IBM Cognos servers. Administrators can now permit or deny users the capability to schedule activities without losing control of the balance of server processing load. User based scheduling can now be managed through a capability setting which permits or denies users access to certain schedule fre-
frequencies and priorities. When you create a new schedule, users will only be able to see the scheduling options that they are authorized to access.

**Enhancements to IBM Cognos Administration**

The IBM Cognos Administration console provides a central interface for the management of system resources and insight into the status of services and user activities. Enhancements to IBM Cognos Administration console features in this release of IBM Cognos BI provide a greater level of detail related to IBM Cognos BI server utilization.

**Better insight into upcoming activities**

Administrators can now view scheduled activities down to a single hour. Enhancements to the Upcoming Activities chart provides administrators with the ability to drill down within a day's scheduled activities to view peaks for processing load. This can reveal possible opportunities to balance load based on information requirements and available resources, making it possible to optimize utilization of all available server resources.

**The ability to suspend upcoming activities**

Administrators can resolve potential processing issues by suspending non-critical activities and allowing them to be processed during an off-peak scheduling window. Schedules can be suspended for a defined amount of time to allow for server load or supporting system downtime. If a reporting database unexpectedly goes offline, for example, schedules can also be suspended and then resumed once the database outage is corrected.

**Additional details available about current activities**

After activities are running, administrators may need to identify which application service and hardware resources are being utilized in order to make decisions about future activity scheduling and resource allocation. IBM Cognos Administration now provides the process ID for currently running activities along with the duration or execution time of the last successful run of the activity.

**View dependencies for package data sources**

Administrators can now view data source dependencies for individual packages through the package actions interface.

**Improved credential management**

This release of IBM Cognos Business Intelligence includes several enhancements to credential management.

**Automatic update of trusted credentials**

For IBM Cognos BI deployments that do not implement a single sign-on (SSO) solution, stored credentials used for running scheduled activities can be automatically updated. When a user logs into the IBM Cognos BI application with a user name and password, the trusted credential used to run schedules when not logged in will be refreshed as well. This removes the burden from the end user of having to remember to manually refresh their trusted credentials and may eliminate failed activities caused by changed or expired user credentials.
User based credential management
Administrators can now configure user based credential management for data source access. In previous releases, credentials used to access data sources are either configured and stored centrally by an administrator and used by all users accessing the database, or users are prompted to provide credentials from an external namespace or from the underlying database. Administrators can now elect to have users manage their own data access signons which will be stored under a user’s profile. This provides administrators with an optional mechanism to eliminate the need to manage data access signons and reduces the effort required for administrators to manage an IBM Cognos BI deployment.

Improvements to auditing
Auditing facilities now provide the ability to track the IP address of users accessing the system. The ability to identify system events by IP address will help administrators and network analysts to track the source of network communications related to IBM Cognos BI applications.

Improved upgrade processes
The new name for Upgrade Manager is IBM® Cognos® Lifecycle Manager. Traditionally, testing report content between two versions has required time consuming and tedious work. With IBM Cognos Lifecycle Manager, validating that reports from two different versions have no differences is much easier than before. IBM Cognos Lifecycle Manager provides a validation workflow that allows you to do all tasks required during the upgrade validation, including approving or rejecting differences to reports. The tool also allows you to add notes to report objects during the upgrade process so that decisions can be tracked and followed up on until the upgrade project is complete. IBM Cognos Lifecycle Manager also allows for an exportable report that can be distributed to all people in the organization. The information in the report allows you to track progress and measure the success of the upgrade.

A few of the key enhancements include the following:

- You can now create benchmark projects to compare reports from a single environment. For example, you can compare snapshots against a baseline.
- In addition to reports in PDF format, you can now compare reports in HTML, XML, CSV, Microsoft® Excel 2007, Microsoft Excel 2002, and Microsoft Excel 2000 Single Sheet format.
- You can now compare reports in any language that IBM Cognos BI supports.
- You can quickly test dynamic query mode without changing the query mode of the users accessing the environment.
- You can set a date-time value as a project configuration option.
- You can now view report execution times for source and target reports.
- You can import an archived project into a new project, allowing you to reuse previously executed content.

For more information, see the Lifecycle Manager User Guide.
Support for multi-version coexistence

Multi-version coexistence allows for a more seamless upgrade experience for the end user by allowing administrators to upgrade the IBM® Cognos® software in stages. During the staged upgrade, users have access to two versions of the product through a single common portal entry point. This feature will give administrators the time they require to upgrade content from the previous version without affecting the business users requirements of accessing new features.

Multi-version coexistence will allow an installation of the latest version of IBM Cognos Business Intelligence to display content hosted in an earlier version of IBM Cognos BI through a single IBM Cognos Connection portal. In some upgrade scenarios, a staged upgrade is going to be required to allow users to take advantage of new features and functionality quickly while administrators upgrade the existing content running in an earlier version. This staged upgrade approach will allow more flexibility during the upgrade process by allowing applications to move as they are ready. The all or nothing approach to upgrade is eliminated. Single applications or groups of reports no longer delay the upgrade of an IBM Cognos BI environment.

Enhanced search capability

Enhanced search allows users, regardless of their knowledge of business intelligence, to embrace the decision-making power of IBM® Cognos® Business Intelligence. Users can quickly and securely access both structured and unstructured information using standard search interfaces, and then use this information to dynamically create BI content. Enhanced search is the default search method within IBM Cognos BI. Cognos administrators can control whether enhanced or standard search modes are utilized, and which users or groups will leverage the enhanced search capability.

Enhanced search, and other IBM Cognos BI features, help to create a self-service BI environment that reduces the burden on IT. Because it is easier for users to access the information they need, IT spends less time finding and distributing reports, and creating redundant reports and analysis when an existing report would meet user needs. IT maintains administrative control over search targets and indexing. Using enhanced search also reduces the need to create and maintain drill paths between related reports.

Enhanced search is integrated with existing IBM Cognos security features to deliver a single security environment for all users regardless of how they consume reports. Users only see the reports, metrics and analysis that they have been given permission to view. Security options include the ability to suppress report titles and descriptions.

The key benefits of enhanced search for users include the following:

- Search assisted authoring

  Queries are dynamically created based on search terms allowing users the ability to further refine the query in the most appropriate IBM Cognos studio. This gives the user a great head start and takes the ambiguity out of designing queries from scratch.

- Full data searching

  Users often have difficulty finding relevant reports because of the large number of reports or the folder structure used to organize the reports. Also, similar report titles and descriptions can suggest that different reports answer the same question. Full data search allows users to locate
relevant reports by searching for specific terms, such as a customer name, product name, or location, that rarely show up in titles or descriptions.

- **Search assisted exploration**

  If a user selects a search result that is associated with a cube data source, the user is taken to the appropriate drill location and they can then continue their analysis in Analysis Studio. This provides users, who may not be familiar with the data, a launching point for further analysis.

For information about how to set up and configure enhanced search, see the *IBM Cognos BI Installation and Configuration Guide*.

For information about creating and updating the index for enhanced search, see the *IBM Cognos Administration and Security Guide*.

### Expanded support for SAP BW data sources

IBM® Cognos® Business Intelligence continues to expand and improve support for SAP BW data sources to ensure that you are able to gain maximum return from your SAP BW investment. Both system administrators and report authors benefit from enhancements.

#### Ability to create personal packages for SAP BW data sources

System administrators and business users need to be able to quickly and easily provide report authors with access to SAP BW data sources. To expedite this process it is now possible to create a package directly from a new or existing SAP BW data source. This functionality is available to business users directly from IBM Cognos Connection. System administrators will also find this functionality in IBM Cognos Administration. This new functionality bypasses the need to publish packages from Framework Manager by providing a web-based wizard that walks the user through the creation of a package from a new or selected SAP BW data source. To prevent the proliferation of personal packages by users, system administrators are able to restrict package creation based on specific SAP BW data sources. For more information on creating personal packages for SAP BW data sources, see the *IBM Cognos Administration and Security Guide*.

#### Prompting for SAP BW variables

SAP BW variables are parameters in a SAP BW query that your business warehouse administrator sets up. When the queries run, the SAP BW variables are filled with values. SAP BW variables are automatically exposed as prompts when you run a report or when you add data to a report.

Prompting for SAP BW variables in IBM Cognos BI has improved. You are prompted for optional variables when you initially drag and drop data items.

#### Time-dependent hierarchies

Time-dependant hierarchies now automatically reflect hierarchy or structure changes. When a structure is imported into Framework Manager, each SAP BW time hierarchy is depicted as an individual level. Report Studio users can use these structures to report on and compare levels that are valid for a specific time period.
Intuitive report naming

When you run a report in an export format such as PDF, delimited text (CSV), or Microsoft® Excel (XLS), the IBM® Cognos® report name is now used as the exported file name. This allows you to save the report output using the same name as the original report, making it easier to identify and manage content.

Enhancements to supported environments

To review an up-to-date list of environments supported by IBM® Cognos® Business Intelligence products, including information on operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the IBM Cognos Information Center (http://publib.boulder.ibm.com/infocenter/cogic/v1r0m0/index.jsp).
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