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**Introduction**

This tutorial consists of interactive tasks that enable you to learn how to use IBM® Cognos® Insight. Cognos Insight is a data exploration and planning solution.

**Audience**

For analysts and business users who are looking to more easily access and understand key business information, Cognos Insight empowers you to independently discover, explore, and share this information, and then take action. In contrast to spreadsheets or other point solutions that create information silos, Cognos Insight can be seamlessly woven into a workgroup or larger corporate entity.

**Finding information**

To find IBM Cognos product documentation on the web, including all translated documentation, access one of the [IBM Cognos Information Centers](http://pic.dhe.ibm.com/infocenter/cogic/v1r0m0/index.jsp). Release Notes are published directly to Information Centers, and include links to the IBM Support portal.

**Accessibility Features**

Accessibility features help users who have a physical disability, such as restricted mobility or limited vision, to use information technology products. Cognos Insight has accessibility features. For information on these features, see the accessibility section in the [IBM Cognos Insight User Guide](http://pic.dhe.ibm.com/infocenter/cinsight/v10r2m0/index.jsp), which is available on the [IBM Cognos Insight Information Center](http://pic.dhe.ibm.com/infocenter/cinsight/v10r2m0/index.jsp).

**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.

**Samples disclaimer**

The Sample Outdoors Company, Great Outdoors Company, GO Sales, any variation of the Sample Outdoors or Great Outdoors names, and Planning Sample depict fictitious business operations with sample data used to develop sample applications for IBM and IBM customers. These fictitious records include sample data for sales transactions, product distribution, finance, and human resources. Any resemblance to actual names, addresses, contact numbers, or transaction values is coincidental. Other sample files may contain fictional data manually or machine generated, factual data compiled from academic or public sources, or data used with permission of the copyright holder, for use as sample data to develop sample applications. Product names referenced may be the trademarks of their respective owners. Unauthorized duplication is prohibited.
Chapter 1. The setting for the tutorial

In this tutorial, you work for the Sample Outdoors Company. You will use IBM Cognos Insight to examine and review corporate data.

By using the sample workspaces to perform a set of tasks, you can explore Cognos Insight and learn how it can help you use your corporate data to fully understand how your company is doing now and what lies ahead.

Specifically, you need up-to-date information that will enable you to perform the following activities:

- Determine the current state of your company.
- Identify trouble spots.
- Perform what-if analyses to help plan the future direction of the company.

You will assume different roles as you perform the tasks in the tutorial.

The Cognos Insight samples

To use this tutorial, you must download the Cognos Insight samples from the Getting Started with Insight community (https://www.analyticszone.com/wikis/home#/wiki/W688ee50d7e7f_4322_b0bb_006007324321/page/IBM%20Cognos%20Tutorial%20and%20Samples).

Each workspace includes the following widgets that enable you to understand and interact with your data:

- Tabs, to make it easy to browse through the workspace
- Crosstabs, to view dimensions and perform basic analysis on your data
- Charts, to clarify numbers and communicate comparisons, relationships, and trends
- Text, to create a title or add an explanation
- Images, to add visual impact

The Cognos Insight window

The Cognos Insight window includes the following parts:

The actions icon

Clicking the Actions icon expands a menu that includes options to create, open, save, print, export, and close workspaces.

A crosstab and chart widget

Widgets are the pieces of a Cognos Insight workspace. One type of widget contains a crosstab, or grid, and a chart. The data in the crosstab is linked to the data that appears in the chart, so when you change the data in the crosstab, the chart data changes as well, and when you change the data in the chart, the crosstab changes as well.

A widget toolbar

The widget toolbar appears when you are working in a widget. It includes
icons that are particular to the widget, such as the **Change chart** icon, which enables you to change the type of the chart that appears in the widget.

**The overview area**

The overview area is displayed above a crosstab or chart. The overview area tells you what dimensions and measures appear in the crosstab, chart, or crosstab and chart. The overview area is divided into three sections: rows, columns, and context. These sections represent the dimensions and measures that appear in the rows, columns, and context of the crosstab, chart, or crosstab and chart. For example, if the Products dimension appears in the rows section of the overview area, then products also appear in the rows of the crosstab.

**The content pane**

The content pane displays all of the cubes, dimensions, measures, and attributes that you can work with in the current workspace. From the content pane, you can also import, create and delete, move, and edit the elements in the content pane. The content pane also displays import processes, which enables you to refresh data from a specific import.

**Explore points**

An explore point is a list of the elements in a dimension. You can click the elements to filter the data in the crosstab, chart, or crosstab and chart.

**Tabs**

Workspaces can be divided into several tabs. From the tabs area, you can create, delete, and rename tabs.

**The tab thumbnails icon**

Clicking the tab thumbnails icon displays small graphics of each tab so that you can navigate to another tab using these graphics instead of the tab names.

The following figure displays the locations of the parts of the Cognos Insight window.
Figure 1. The parts of the Cognos Insight window
Chapter 2. Installing Cognos Insight

Before you can begin following this tutorial, you must have IBM Cognos Insight installed on your computer.

The way in which you download and install Cognos Insight depends on the other Cognos products in your environment.

**Procedure**

Perform one of the following procedures depending on which Cognos products you have:

<table>
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<th>Option</th>
<th>Description</th>
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<td>Cognos Insight and IBM Cognos Express®</td>
<td>See “Installing Cognos Insight from a Cognos server” in the Cognos Insight Installation and Configuration Guide on the Cognos Insight Information Center (<a href="http://pic.dhe.ibm.com/infocenter/cinsight/v10r2m0/index.jsp">http://pic.dhe.ibm.com/infocenter/cinsight/v10r2m0/index.jsp</a>).</td>
</tr>
<tr>
<td>Cognos Insight and IBM Cognos TM1®</td>
<td>See “Installing Cognos Insight from a Cognos server” in the Cognos Insight Installation and Configuration Guide on the Cognos Insight Information Center (<a href="http://pic.dhe.ibm.com/infocenter/cinsight/v10r2m0/index.jsp">http://pic.dhe.ibm.com/infocenter/cinsight/v10r2m0/index.jsp</a>).</td>
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<tr>
<td>Cognos Insight and IBM Cognos Business Intelligence</td>
<td>See “Installing Cognos Insight from a Cognos server” in the Cognos Insight Installation and Configuration Guide on the Cognos Insight Information Center (<a href="http://pic.dhe.ibm.com/infocenter/cinsight/v10r2m0/index.jsp">http://pic.dhe.ibm.com/infocenter/cinsight/v10r2m0/index.jsp</a>).</td>
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Chapter 3. Importing data

As a sales executive at the Sample Outdoors Company, you want to review your order data to analyze your company’s performance. You have a spreadsheet file that includes this data, so you decide to import the file into an IBM Cognos Insight workspace for analysis.

Procedure

1. From the Microsoft Windows Start menu, launch IBM Cognos Insight.
2. From the Get Data menu at the top of the window, click Import Data. The import wizard appears, displaying the Import Data - Select Data Source page.
3. To import a file, beside the Name field, click Browse. A new Open window appears where you can browse the files on your computer.
4. Navigate to where you downloaded the samples, and then open the Orders_language_code.csv file. For example, if you want to work with the Spanish sample file, open the Orders_ES.csv file. The data from the file appears in the import wizard.

Tip: You can expand the File Details section to display details about how your source data is imported. In this example, the default options are appropriate. You decide that you don’t want to import all of the data from your file into Cognos Insight.

5. In the Columns section, in the Import column, clear the check boxes for the following data items to indicate that these items should not be imported:
   a. Order number
   b. Month
   c. Order size
   d. Unit sale price
   e. Ship date
   f. Sales representative
6. Click Advanced. The Import Data - Data Mapping page of the import wizard appears. This page provides details about how your data will be imported. Note that Cognos Insight automatically nested the City element within the Country or Region element, because cities are logically child items of countries or regions.

Tip: You can drag items from the Source Items list to the Target Items hierarchy, and you can drag items to different positions in the Target items hierarchy. When you drag items, your cursor changes to display information about where you can drop the item and what the item will become if you drop it in that position.

The figure below shows the Mapping pane as it should appear after step 6.
7. Click **Summary**. The **Import Data - Importing** page of the import wizard appears. The **Import Messages** pane displays the actions that Cognos Insight will perform when you import the data. The **Property Summary** pane displays the settings that you chose in the **Properties** pane for each target item. You can use this summary to review and compare the properties of each type of data, including the cube you are creating and its dimensions, levels, attributes, and measures.

8. Click **Import**.

Your data appears in a new Cognos Insight workspace. The workspace includes a crosstab and a column chart, and your data hierarchy appears in the content pane on the right, under the heading **Data**.

The figure below shows the workspace after importing the CSV file.
The crosstab displays the following data from your new cube:

- The **Product** dimension appears in the rows of the crosstab.
- The three measures in your cube, **Order Revenue**, **Order Quantity**, and **Count**, appear in the columns of the crosstab.

The chart displays the following data from your new cube:

- Products are plotted as columns in the chart. For example, there is a column for **Infinity** in each group of columns.
- The three measures in your cube are plotted as groups of columns in the chart. For example, there is a group of three columns for **Order Revenue**.

The overview area above the crosstab identifies the data that appears in your crosstab:

- The rows section shows that the **Product** dimension appears in the rows of the crosstab.
- The columns section shows that the **Orders language_code Measure** dimension appears in the columns of the crosstab. The name of the measures dimension depends on the name of the cube, which comes from the name of the file that you imported. For example, if you imported the Spanish sample file, **Orders_ES.csv**, your cube would be named **Orders ES**, and the measures dimension would be called **Orders ES Measures**.
- The context section shows that the **Customer** dimension, the **City** dimension, and the **Order date** dimension appear in the context of the crosstab. The dimension names in the context section represent the totals for
the dimensions, such as **Total of Customers**. The **Order date** dimension appears as **2007** in the context section, because only 2007 was included in the source file.

**Tip:** You can click the dimensions in the rows, columns, and context sections of the overview area to change the data that is displayed in your crosstab and chart. For example, click **Total of City**, and then click **Austria**. Now only the data for Austria is displayed in your crosstab and chart instead of the data for all cities. To return to displaying the data for all cities, click **Austria** in the context section, and then click **Total of City**.

You decide that you want to add data about sales representatives to your workspace so that you can see which sales representatives were responsible for the most revenue.

9. From the **Get Data** menu, click **Import Dimensions**. The import wizard appears, displaying the **Import Dimensions - Select Data Source** page.

10. Click **Browse**, and then navigate to and open the same file that you imported previously. The data from the file appears in the import wizard.

11. In the **Columns** section, below the **Import** column, click **Exclude All**, and then select only the **Sales representative** check box.

12. Click **Import**. The new dimension is imported, and it appears in the content pane in the **All Dimensions** list. The import process you just ran also appears in the content pane on the right, in the **All Imports** list.

13. In the content pane, expand the **All Dimensions** list, and drag the **Sales representative** dimension onto the **Orders language_code** cube. The cube is named differently depending on the language of the file that you imported. For example, if you are imported the Japanese CSV file, drag the dimension to the **Orders JA** cube. The Add Dimension window appears.

14. In the Add Dimension window, leave the **Share dimensions** option selected, and click **OK**. Sharing a dimension means that the same dimension will appear in the list of all dimensions and in the cube. If you clicked **Duplicate dimensions**, you would create a copy of the **Sales representative** dimension and add that copy to the cube. Your crosstab displays revenue by product, and you can filter by changing the customer, city, date, or sales representative in the context section. You can also choose to display order revenue, order quantity, or unit sale price as your measure. When you change the crosstab, the chart is also updated. The figure below shows the resulting workspace, including the **Sales representative** dimension in the overview area and the content pane. You do not need to save this workspace to continue the tutorial.
15. Click the **Actions** icon, and then click **Close**.

16. When you are prompted to save the changes you made to the sample, click **No**.

**Figure 4. The new workspace with all data imported**
Chapter 4. Navigating the tabs in the workspace

As a sales executive at the Sample Outdoors Company, you need to keep track of how the company is doing.

To do this, you want to look at the company’s sales data for its products to determine whether there are problem areas that need further investigation. Tabs are used to categorize the data and help you navigate it.

**Procedure**

1. Click the **Actions** icon and then click **Open**.
2. Navigate to where you downloaded the samples and double-click **Orders_language_code.cdd**.
3. Click the **Orders** tab. The **Orders** tab appears.

   There are four tabs along the bottom of the Cognos Insight window. Using tabs can help you organize data and filters to hide or focus on specific data. For example, you can use tabs to tell a story about your own business by separating the aspects of your business into meaningful divisions that allow you to quickly view and analyze your data. Each tab displays different information, but all the tabs are part of the same workspace.

   **Tip:** You can also change tabs by clicking the action buttons at the top right of the canvas. For example, the **Orders** tab includes three action buttons: **Samples**, **Products**, and **About this Sample**, as shown in the following figure. Clicking an action button takes you to the corresponding tab. You can add action buttons like these to any workspace by clicking **Action button** from the **Insert** menu.

   On the **Orders** tab, there are three crosstab widgets and two chart widgets. Along the left of the workspace are three explore point widgets. The **Orders information** crosstab shows that sales are much lower for the **Kodiak** line than for the other two lines. You want to explore the data to find more information about the sales.

4. In the **Products** explore point on the left of the workspace, click **Kodiak**. This selection filters out product information for the **Infinity** and **Legend** products, as shown in the following figure.
Tip: You can use the **Clear this explore point** icon to display all the products again. If you clear the explore points, ensure that you select **Kodiak** again to continue with this tutorial.

5. In the pie chart, hover over the pie slices to display sales information for the countries or regions where the **Kodiak** product line is sold.

6. In the **Customers** explore point, click **Kanga Kapers**. The following figure shows the resulting workspace.
The following information appears on the Orders tab now:

- The Orders information crosstab shows the sales revenue for the Kanga Kampers company and also shows that all sales occurred in February.
- The Sales by country crosstab shows the sales revenue by country or region. All sales occurred in Australia.
- The area chart shows the sales graphically.
- The pie chart shows the breakdown of sales by country or region.
- Below the area and pie charts, the Order details crosstab shows more details about the Kanga Kampers sales, such as City, Order quantity, and Sales representative.
- In the Order size explore point, note that all orders are within the 1-5000 range.

7. Click the Products tab at the bottom of the Cognos Insight window. This tab includes information about surveys, products, sales, and revenue in a crosstab, several charts, and some graphics and text.

8. Click the Actions icon, and then click Close.

9. When you are prompted to save the changes you made to the sample, click No.
Chapter 5. Exploring the data

As a sales account manager, you know that sales are down for the Legend line of products. You want to drill into the data in your workspace to determine where there may be sales opportunities. Focusing on key aspects of your data is easy to do in Cognos Insight. It is also important because it allows you to see differentiators in your data that you may otherwise not have known about from a common spreadsheet.

Procedure

1. Click the Actions icon, and then click Open.
2. Navigate to where you downloaded the samples and double-click Orders_language_code.cdd.
3. Click the Orders tab. The Orders tab appears.

   There are four tabs along the bottom of the Cognos Insight window. Using tabs can help you organize data and filters to hide or focus on specific data. For example, you can use tabs to tell a story about your own business by separating the aspects of your business into meaningful divisions that allow you to quickly view and analyze your data. Each tab displays different information, but all the tabs are part of the same workspace.

   Tip: You can also change tabs by clicking the action buttons at the top right of the canvas. For example, the Orders tab includes three action buttons: Samples, Products, and About this Sample, as shown in the following figure. Clicking an action button takes you to the corresponding tab. You can add action buttons like these to any workspace by clicking Action button from the Insert menu.

   On the Orders tab, there are three crosstab widgets and two chart widgets. Along the left of the workspace are three explore point widgets. The Orders information crosstab shows that sales are much lower for the Kodiak line than for the other two lines. You want to explore the data to find more information about the sales.

4. On the left of the Cognos Insight window, in the Products explore point, click the Legend product.

   This hides product information about the Kodiak and Infinity products, as shown in the following figure.
You see that orders have dropped sharply in July. You want to further explore customer sales for that month.

5. In the Customers explore point, there are seven customers listed. The four customers that are listed in bold at the top of the list are the customers who ordered Legend products. If you clear the Legend product and select the Kodiak product, the Customers explore point changes to display the customers who ordered Kodiak products at the top of the list and in bold.

The chart showing the order size over time is an area chart. For a more effective representation, you want to change it to a bar chart.

Before distributing this workspace, the administrator locked the widgets to preserve data integrity and prevent users making accidental changes to the data. However, you need to edit a crosstab, so you must unlock the widgets.

6. Right-click in the area chart widget, and then click Unlock widget. The area chart looks like a line chart with the area below the line filled in with a solid color.

7. Click the Change chart icon, and from the list, click Bar, and then click outside the chart to confirm the selection.

8. Right-click the bar chart, and then click Lock widget.

Tip: To lock all widgets, place the cursor in the background of the workspace, right-click, and then click Lock all widgets.

9. In the Customers widget, click each of the customers who bought Legend products to see sales by month and country or region to help you determine when and where to target your sales campaigns.

10. Click the Actions icon, and then click Close.
11. When you are prompted to save the changes you made to the sample, click No.

Results

From exploring the data in the workspace, you can tell that there may be sales opportunities for the **Legend** line of products among the three companies that did not order the **Legend** products. There may also be opportunities to increase sales to your current customers.
Chapter 6. Customizing your view of the data

You can customize the data in your workspace to see different information than what is displayed by default.

Procedure

1. Click the Actions icon [Actions], and then click Open.
2. Navigate to where you downloaded the samples and double-click Orders_language_code.cdd.
3. Click the Insert a new tab icon [Insert a new tab].
   A new tab appears at the bottom of the Cognos Insight window. The new tab is called Tab 5.
   Tip: You can rename a tab by right-clicking the tab, clicking Rename, and then typing a new name.
   You now have a blank canvas to use for creating a new view of the data.
4. Open the content pane to see all the dimensions and measures that have been imported into this workspace.
5. Drag the Orders information cube onto the workspace.
   By default, dragging the cube displays the first dimension, Total of Order number, and all the measures that are available in the cube. In this case, there is only one measure, Order Revenue.
   The overview area above the crosstab identifies the data that appears in your crosstab:
   • The rows section shows that the Order number dimension appears in the rows of the crosstab.
   • The columns section shows that the Orders Measures dimension appears in the columns of the crosstab.
   • The context section shows remaining dimensions in the context of the crosstab. The dimension names in the context section represent the data that is displayed in the crosstab. For example, if the Products dimension displays the Legend item in the context section, then the data in the crosstab is only for the Legend product. If the Products dimension displays Total of Products in the context section, then the data in the crosstab is for all of the products.
   Instead of the Order number in the crosstab rows, you want to see the Products. To do this, you need to swap the Products dimension for the Order number dimension.
6. From the content pane to the right of the Cognos Insight window, drag the Products dimension to the rows of the crosstab. Ensure that the rows section of the overview area is now displaying Products.
   As well as the total of products, you want to see customer information.
7. From the content pane, drag the Customers dimension to the right of Products in the rows section of the overview area.
   The crosstab displays the revenue for all products for all customers and the revenue for all products for each customer, as shown in the following figure.
Next, you want to see revenue information.

8. From the content pane, drag the Month dimension to the right of the Orders Measures dimension in the columns section of the overview area.

This adds revenue columns for January to July, as shown in the following figure.

9. To see the quantity ordered by month, click Total of Order size in the context section of the overview area, and then click each entry to see the quantity that each customer is buying each month.

By swapping, nesting, and positioning your data set, you can create the views and perspectives that you need to help you analyze your data.

10. Click the Actions icon, and then click Close.

When you are prompted to save the changes you made to the sample, click No.
Chapter 7. Performing a what-if analysis

As the human resources manager, you need to determine the business impact of making changes that affect the structure and staff of the Sample Outdoors Company. In this case, you want to see the effect of increasing salaries by 5%.

Procedure

1. Click the Actions icon, and then click Open.
2. Navigate to where you downloaded the samples and double-click HumanResources_language_code.cdd.
3. Click the Employee expenses tab at the bottom of the Cognos Insight window.
4. Right-click in the Employee expenses widget, and then click Unlock widget.

   Tip: To unlock all widgets, right-click the background of the workspace, and then click Unlock all widgets.
5. In the Employee expenses crosstab, right-click Pay, and then click Duplicate.
6. Type What-if Pay 5 to rename the column. You decide to use a formula to calculate a 5% increase in salaries. For more information about formulas, see the IBM Cognos Insight User Guide on the Cognos Insight Information Center (http://pic.dhe.ibm.com/infocenter/cinsight/v10r2m0/index.jsp).
7. Click the cell at the intersection of the What-if Pay 5 column and the Total of Country row, type inc5, and then press Enter.

   The values in all the cells in the What-if Pay 5 column increase incrementally by five percent. The following figure shows the updated crosstab and chart.
You can create what-if scenarios to forecast, plan, and differentiate the possibilities of your data set.

8. Click the Actions icon, and then click Close.
9. When you are prompted to save the changes you made to the sample, click No.
Chapter 8. Manipulating and analyzing data

As the manager of the Sample Outdoors Company who is responsible for training, you need to cut costs. To help you determine where you can cut costs, you want to compare costs for given periods of the year.

Procedure

1. Click the Actions icon, and then click Open.
2. Navigate to where you downloaded the samples and double-click HumanResources_language_code.cdd.
3. Click the Employee training tab at the bottom of the Cognos Insight window.
   This tab provides at-a-glance course information. It shows the courses by name, a list of attendees, the total course enrolment by course, and graphs of the course cost, the number of days, and the enrolment by month.
   Now, you want to group January, February, and March so that you can analyze the data by quarter.
4. Right-click on the crosstab under Employee training by month, and click Unlock Widget.
6. Right-click the selected columns, and then click Insert Parent. Note that the selected members are grouped under a new member called Member 1.
7. To rename Member 1 to something more meaningful, right-click Member 1, click Rename Member and type Quarter 1.
   You can now see that the course costs for the quarter are $32000, which is close to the total for the month of July. You may want to explore further to see why there is such a difference so that you can decide whether you need to take action.
   Creating hierarchies of parent-child relationships allows you to expand your data set and gives you enhanced control of your application.
8. Click the Actions icon, and then click Close.
9. When you are prompted to save the changes you made to the sample, click No.
Chapter 9. What's next?

In this tutorial, you have learned some basic skills to apply when exploring your data in IBM Cognos Insight.

There is much more that you can do in Cognos Insight. For instance, you can create calculations or design your own workspace and add widgets such as tabs, crosstabs, charts, text, images, and web pages. If you have a license for IBM Cognos TM1, IBM Cognos Business Intelligence, or IBM Cognos Express software, you can use Cognos Insight to publish, distribute, and control your workspaces. To learn how to perform these tasks, see the *IBM Cognos Insight User Guide*, which is included with every edition of Cognos Insight. The user guide is available from the Help menu in Cognos Insight.

The following workflow example illustrates how Cognos Insight works with other products in the Cognos family.

1. User A creates a workspace (or CDD file) in Cognos Insight that shows worldwide sales by salesperson and by country or region. User A decides to ask for a manager’s input before finalizing the workspace. So User A emails the workspace to User B, a manager.

![Figure 11. Workflow of User A sending a workspace to User B](image)

2. User B reviews the workspace and makes some minor changes to how the data is displayed. Then User B emails the workspace back to User A.

![Figure 12. Workflow of User B sending the workspace to User A](image)

3. User A likes the changes that User B made, and wants to share the workspace with other employees. User A has permission to add files to his company’s Cognos Business Intelligence server, so User A uses the *Share* feature in
Cognos Insight to add the workspace to the Sales folder in Cognos Connection.

4. User C finds the workspace on Cognos Connection, and decides that the International Sales team would also benefit from the information in the workspace. User C opens the workspace from Cognos Connection and updates the data from the company’s sales database. User C then asks the Cognos TM1 server administrator to publish and distribute the workspace to the Cognos TM1 server and Cognos BI server so that other users can access the data online.

5. The Cognos TM1 server administrator publishes and distributes the workspace and model to the Cognos TM1 server and the Cognos BI server. Publishing and distributing adds an application and the data model to the Cognos TM1 server, and adds a data source connection and reports to the Cognos BI server. The administrator also schedules a refresh of the data in the model from the company’s database so that users can refresh the report data.
6. User C finds one of the published reports on Cognos Connection and schedules a PDF report to be regularly burst to the International Sales team.

Figure 15. The server administrator publishes and distributes the workspace

Figure 16. User C bursts a report to the International Sales team
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